

# Planning Study Report June 2015

*A discovery*

*process*

*for*  
**FIRST PARISH CHURCH, UCC**

# BRUNSWICK, ME

*Prepared by:*



Full Harvest Fundraising  
*Raising People. Raising Money.*

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*Revised*

**“Now there are varieties of gifts, but the same Spirit, and there are varieties of services, but the same Lord, and there are varieties of activities, but it is the same God who activates all of them in everyone.”**

*First Corinthians 12; 4-6*

## ***Background***

First Parish Church contacted Full Harvest Fundraising in February 2015 to discuss a consulting relationship to assist the church in looking at a potential capital campaign. Peter Heinrichs and Susan Lewis (co-founders of Full Harvest) met in person with church leaders several times over coming months as plans for what eventually led to this Study began to gel. A contract for this study was signed in March 2015.

From May 12-26, Peter and Susan conducted confidential interviews with a cross-section of people in the congregation, and with a number Brunswick community leaders. All but one interview were conducted in person. One community interview took place by phone. In all, they interviewed 46 church households, totaling 65 individuals – and 10 community leaders. A copy of the results of the community interviews has been shared with leaders of Council and the Facilities Study Team.

No names appear in this report in conjunction with information provided by church members, but interviewees consisted of a mix of top pledgers, staff, and representatives of various constituencies that make up the congregation irrespective of giving level. They ranged in age from young adults to seniors and their history with First Parish spanned from a handful of years to half a century or more. Most currently have or have had a high degree of participation in church activities and committees. Current activities identified by interviewees include: choir, bell ringers, Deacons, Jane's Team, stewardship, long range planning, council, finance, greeters and ushers, adult and/or children's education, earth care, outreach, 300<sup>th</sup> anniversary, building and grounds, labyrinth, confirmation mentorship, and a host of other committees and volunteer roles.

This report is being shared with church leaders on June 4, 2015, with Ministry Forum on June 6, and with those who wish to attend from the congregation on June 14. At the conclusion of the June 14<sup>th</sup> meeting, the Planning Study contract will have been fulfilled. We look forward to taking next steps with a new contract.

### ***Purpose***

This document is not a Feasibility Study. A Feasibility Study proposes a project or projects, presents design plans and estimated costs, and outlines a case for a possible capital campaign. The case states what the vision is behind the project, who this vision is important to, and how the project can impact your current membership, the wider community, and generations to come. A Feasibility Study, in other words, seeks specific feedback (including projected pledge dollars) on a clearly documented proposal.

We have called this current process of discussions with leaders of First Parish, interviews with 46 households in the church and 10 community leaders, a "Planning Study." The purpose of this Planning Study is to look at the congregational input that will give shape to a set of possible building projects in the church sanctuary and Pilgrim House. An actual Feasibility Study, with defined projects and their costs, may follow at a later date.

### ***Findings***

#### **Familiarity with the projects under consideration**

- **Most of those interviewed described themselves as "somewhat" or "very familiar" with the proposed projects for the Sanctuary, which include:**
  1. Adding a ramp from the Sanctuary to Vestry;
  2. Modifications to the front of the Sanctuary; and
  3. Opening up choir loft visibility with a railing

People reported slightly less awareness of the ramp project, most likely because there are 3 different schemes under consideration and many weren't aware of the differences between the schemes. At most, only 5 people were "not familiar" with any of these projects.

- **Most described themselves as "somewhat" or "very familiar" with the proposed options for Pilgrim House, which range from:**
  1. Making repairs and updates to the roof, windows and doors and adding an elevator, and accessible bathrooms;
  2. Doing the work in Option 1 plus adding a new Fellowship Hall and kitchen onto the building facing Maine Street; and
  3. Razing the current structure and creating a new, accessible building yet to be designed

There appears to be slightly less awareness of these proposals than of the Sanctuary projects. Nine (9) to 11 people said they are "not familiar" with the various Pilgrim House options.

- We noticed that while most identified themselves as "familiar" with the projects, **a number of these people were not (yet) aware of the *current details* of the projects until our conversation with them.** Their familiarity was of a more general nature and based on information from previous proposals from years past. This led us to the observation at the end of this report about the importance of communication and not making assumptions about awareness that isn't actually there.

### **Support for the projects under consideration**

We asked people what level of support they would give to each of the proposals for the Sanctuary and Pilgrim House, choosing from a range of 0-5 with 0 = no support and 5 = complete support.

- **The Sanctuary modifications and Ramp projects both received considerable support and received a similar number of "votes". Although the Choir Loft project appears to have fewer supporters (many told us that although it is their third priority) they would be in favor of proceeding if the money is found for all three projects and if they hear that the Choir Loft project is important to Rev. Mary Beard and Ray Cornils and to choir members.**
  - **Sanctuary modification: 59 gave this a 3 or higher/6 gave lower than a 3**
  - **Ramp: 56 gave this a 3 or higher/5 gave lower than a 3**
  - **Choir Loft: 42 gave this a 3 or higher/24 gave lower than a 3**

[Note that a few people declined to vote for projects saying they would need to know more before deciding.]

- **Of the three options under consideration for Pilgrim House, the greatest level of support was given to the proposal to repair and update the roof, windows and doors; install an elevator; create more accessible bathrooms; and construct an addition with a first floor Fellowship Hall with kitchen.**

➤ 45 gave this a 3 or higher/11 gave this lower than a 3

**The second highest level of support was given to the proposal to raze Pilgrim House and rebuild.**

➤ 38 gave this a 3 or higher/23 gave this lower than a 3

**The lowest support was given to the most basic option, which would make repairs and updates to room, windows and doors, install an elevator and create more accessible bathrooms, but not add on a new Fellowship Hall.**

➤ 30 gave this a 3 or higher/33 gave this lower than a 3

**Do you support authorizing church leaders to take the next step and spend money to obtain estimated costs and design proposals for one or all of the projects at a cost not to exceed \$100K?**

- **Bottom line: For the majority, this is a “yes”, but first...**
  - **Many people are looking for a commitment to a process that is well communicated to the congregation.** The process would address such questions as: When will congregation receive more information, and how? When and how will their input be sought? What approval votes will be taken and when? What is the target date for a final decision? How will this be communicated?
  - **Many are asking for the vision for this project to be articulated before moving into the design and estimating phase.** Some called it the vision, others used the word “mission”, “value” or “needs” that the project meets. One person asked how it fits with the Strategic Plan.
- **For comparison purposes, many would support exploring design and cost options for retaining Pilgrim House and adding the elevator, bathrooms, Fellowship Hall, etc. and razing and rebuilding.**
- Some people asked where this money to pay for the design, etc., will come from?
- Several want to make sure the congregation can vote on pursuing the next steps of design and cost estimates
- Several asked if it can be done for less than \$100K

## **Would people participate in a capital campaign to fund the projects chosen in a congregational vote?**

- The concept of a capital campaign received a positive response and it is clear that most people have been expecting this for some time. All but four pledge units we interviewed responded “yes” to this question (42 out of 46).
- Several, including some key funders, noted that the level of their giving will depend on how excited they are by the vision behind the project. In other words, answering the question of how life at First Parish will be significantly enhanced by the project(s).
- We didn’t hear unanimity among the church’s top potential donors who were interviewed in favor of any one Pilgrim House proposal.
- Two are “undecided” and two said “no”

## **How important is it to you that the church more actively explore opportunities to expand partnerships with community organizations that use Pilgrim House and/or the Sanctuary? Potential outcomes might be new uses of the building, creating new relationships and increasing rental income**

- The majority of people see this as “highly important” although there were varying responses to how they perceived the benefits (such as seeing the church be even more open and inviting) and pitfalls (such as taking on more responsibility as a landlord).

## ***Observations and Recommendations***

### **1. FINDING CLOSURE**

In the process of extensive interviewing (interviews lasted from 30-60 minutes), we observed that some larger questions seem to be on many people’s minds, more than straight answers to questions about which projects to move forward. It has occurred to us, therefore, that a more descriptive term for this document might be a “Discovery Process.” Many people interviewed were very appreciative of the opportunity for input and supportive of one or more options to improve both the Sanctuary and Pilgrim House. Just as clearly, we discovered that they also seek more information, a clear process for how decisions will be made, and a resolution (whatever that may be) to options that were explored years ago and, in their minds, never formally decided on by the congregation. Many people wondered out loud “whatever happened” with previous proposals that generated interest for them, such as expanding the vestry, joining Pilgrim

House with 185 Park Row, and perhaps building a skywalk to connect Pilgrim House with the church.

It feels to us as though this Planning Study and the 4Cs meetings have reopened a conversation that has been somewhat dormant of late, but still carrying considerable energy. **For some, there is hesitation about getting their hearts behind plans for Pilgrim House because they wonder what happened to the former plans to unify and expand the campus and whether that discussion can be reopened. We feel it will be helpful – even necessary – to address the resolution of people’s questions about the status of these ideas as part of the next step in planning.**

## **2. HONORING THE PAST THAT HAS LED YOU HERE**

We noticed that some people who had an important part in previous efforts to unify and expand the campus may feel that their gifts weren’t deemed important or valued because those projects took a different turn than expected. **We suggest that you find a way to celebrate and thank everyone who has offered their time, skills, talents, money and vision to bringing the projects to where they are today. Although the process has felt challenging for many, what if you imagine that it has all been happening *for* you, not *to* you? What have you learned, individually and collectively? Can a ‘No’ or a ‘Not Yet’ ever be a gift?**

## **3. MOVING FORWARD WITH SANCTUARY PROJECTS**

Based on the response we heard, we believe that the three proposed improvements to the Sanctuary are ready to be refined and taken to the proposal stage for a congregational vote. This stage involves deciding which of the three ramp schemes you wish to proceed with and obtaining final cost estimates for the work to be accomplished.

As part of moving ahead, we have a suggestion with respect to the ramp proposal (and also the elevator in Pilgrim House.) We noticed that those who have experienced mobility challenges or have been moved by witnessing the challenges of others, tend to support these ideas in a heartfelt way and want to spend the money to make them happen. Others have a more conceptual understanding of the value of a ramp (and elevator) and are less convinced that the money would be well spent. **We feel it could shed light on the access proposals to invite people who have faced challenges attending church and/or gaining access to the second floor of Pilgrim House to offer testimony of what it has been like for them and why it would make a difference for them to see these changes happen.**

## **4. CONSIDERING NEXT STEPS FOR PILGRIM HOUSE**

Even though there is support for the option of tearing down Pilgrim House and designing a new building, a majority of those interviewed support the option of renovating Pilgrim House and adding a first floor fellowship space. It is important to note, furthermore, that there is no unanimity of opinion among top potential donors. We feel that the congregation needs to digest the information from this report and resolve questions about former plans before deciding which option/s for Pilgrim House merit investment in designs and cost estimates. This process need not be lengthy, but deserves leadership's full attention. Please note in addition that there will likely be questions from the congregation concerning 185 Park Row (and possibly 183) and expansion potential in the vestry, and these questions will need to be addressed before recommending one Pilgrim House option over another. Leadership may wish to use the June 14 congregational meeting to cover past issues and receive input on current options, and then bring a recommendation concerning Pilgrim House plans at a following meeting, when further input from the congregation has been received and understood.

## 5. A BOUNTY OF VALUES

For some, the highest expressed value of First Parish is the "historical integrity" of the church's buildings, more strongly felt (among these members) than the value of "accessibility" or "worship facilitation" or something else. Others spoke strongly of valuing "accessibility," "worship facilitation," "music excellence," "mission-led service to others" or "building for the next generation" to name a few of the most heard. First Parish offers a rich opportunity to join with others who value the church for many reasons, all valid. This can offer a powerful invitation to learn from each other and to find respect for other perspectives, even while making decisions that affect the whole.

Unified consensus on all decisions may not be the outcome in such an environment, but we believe the real value is in how you honor the *process*. **There are rich opportunities for connection and growth in the process, not just the outcome. Imagine providing a covenant with each other for how you will move forward.** It could be a covenant of your collective intentions for how you want to be in relationship. Intentions such as remaining open-minded, inclusive, transparent, trusting, enjoying, playful, respecting the decision of the whole -- and never punitive or afraid of 'getting it wrong'!

## 6. BUILDING UP YOUR TEAM

The Facilities Study Team deserves a round of applause for restarting the conversation about moving forward with projects that are a "yes" for First Parish. But these are leaders who already wear other church hats (so to speak). It's our sense that the team needs to be expanded (or perhaps disbanded and reconfigured?) with more



parishioners who bring skills, gifts and interests to serve the needs of this next phase. We suggest you form a **Building Team** to obtain design proposals and costs for selected projects with people who have relevant expertise, a **Funding Team** to prepare a feasibility study process, and a **Communications Team** that builds a case statement and facilitates communication between the teams, the congregation and the community. Perhaps these teams would report to the Council. These are suggestions based on what we have seen work for other churches; you may have a sense of a different model would work for you.

## **7. THE IMPORTANCE OF TRANSPARENCY AND COMMUNICATION**

One of the challenges for many congregations considering a capital campaign is that leadership assumes the congregation is more familiar with the information about the projects and the process than they actually are. There's an old marketing adage that says if you wish to communicate one message to two-thirds of your constituency, you need to get it out there in at least six different ways. (We recently heard that the number has doubled to 12 different ways in today's world!) This means being responsive to how your parishioners of all ages will need to receive and understand information. It also includes sharing the reasons behind key or sensitive decisions to provide an understanding of the process. By building trust through a commitment to transparency, you will experience increased confidence within the congregation. This trust will pay dividends in the future capital campaign. Communicate important information in multiple ways, such as holding large and small group meetings where input is invited and recorded, developing and posting visuals (such as large design plans and photos), regular written updates that are handed out and mailed, e-newsletters, posting information on the church website and Facebook page.

## **8. RELATIONSHIP WITH THE BRUNSWICK COMMUNITY**

Our interviews with 10 Brunswick community leaders provided useful information as part of the current conversation about how First Parish's relationship with the community factors into its building plans. We learned from these leaders about their perceptions of First Parish (very positive), other capital campaigns occurring in Brunswick (none of which we feel would significantly impact a capital campaign at First Parish), potential foundation grants to help pay for a building campaign at First Parish (none that we can see), and potential space and service needs in the community that First Parish might consider addressing as it imagines its building plans (see the report on community interviews for ideas). It is interesting to note that the prevalent 'external' perception of First Parish as an historic "icon" mirrors the perception we heard from many parishioners. We can't help but wonder if this "historic" focus understates a larger story the church could be telling about its many vibrant ministries and programs, its beliefs and practices as a progressive church, its significant economic impact on Brunswick, and much more.

We suggest that you come to a decision early on in the process about whether you wish to have further conversations with the community to explore space needs partnerships as they relate to Pilgrim House and other church facilities. We also suggest that you establish a dialogue with Learning Land as soon as possible to discuss the ideas that are under consideration for Pilgrim House, with a goal of determining whether Learning Land continues to be a good ‘fit’ within the building.

## **9. WHERE HEARTS LEAD, MONEY FOLLOWS**

Many people wondered if the church can raise enough funds to renovate or replace Pilgrim House or to afford particular aspects of Sanctuary projects such as the Choir Loft railing. Some stated that the level of their financial commitment would depend on how “visionary” the case for the project turns out to be, or whether it meets their personal values of importance. In our work with churches, we have noticed that at the beginning of contemplating projects that will be funded by a capital campaign there are some who fear that the money can’t be raised. No amount of persuasion – even a feasibility study (which will be done at First Parish) that shows the money *is* there – will change their minds. Not until the campaign has ended and the goal has been reached, that is. This is a trust walk, a step-by-step process of following where the Heart of God is leading you. Trusting the process changes everything.

## **10. A FEW MORE THOUGHTS**

We’re wondering if asking these questions might be helpful in bringing clarity to the question of what to do about the bricks and mortar:

- Where is God in this?
- What is this for?
- How do *you* want to be in it?

## ***Recap of Suggested Next Steps***

**These are initial suggestions that might be helpful as you develop your own process for the next phase leading up to the Feasibility Study. As you imagine this process, is there a natural rhythm that wants to unfold for you? Is there a way of being connected with one another that wants to happen?**

1. Take time to digest Planning Study Report (How long?)
2. Prepare and communicate (ahead of time) agenda for June 14 Congregational meeting
3. Review feedback from Council/June 4, Ministry Forum/June 6, and Congregation/June 14. (Who does? By when?)
  - Share results with congregation. (How? When?)
4. Schedule review of past proposals and questions with the congregation (What format? When?)
  - Honor volunteers who have contributed so far (How? When?)
5. Early on: Hold an exploratory conversation with Learning Land (Who? When?)
6. Establish Teams to work collaboratively and report to Council
  - Building Team – Obtains designs and costs
  - Funding Team – Prepares Feasibility Study plan and schedule
  - Communications Team
    1. Communicates this process to congregation
    2. Begins drafting Case Statement
    3. Facilitates internal and external sharing of information about the process and results and news from each step
7. Open conversations with existing and potential “community partners” on uses of Pilgrim House by outside organizations (Who? When?)
8. Schedule Building Team Report to share recommendations on design plans and costs with congregation (When? How?) Note: Look at putting info out there via many outlets, such as newsletter, website, e-blast, FB page, bulletin inserts, etc.
9. Plan a congregational vote on approval of the final proposed projects and to authorize proceeding with Feasibility Study (When?)



## Full Harvest Fundraising *Raising People. Raising Money.*

### **Results from the Community Interviews for First Parish Church, UCC**

In support of the church's process of considering changes within the Sanctuary and Pilgrim House, we reached out on the church's behalf to community leaders for an important broader perspective. Full Harvest Fundraising conducted ten interviews with leaders representing significant organizations in the Brunswick community. During May 12-14, 19 and 22<sup>nd</sup>, interviews were held with the following people selected by the church's Facilities Study Team:

- Mike Lyne – Real Estate developer
- Karen Parker – Executive Director, Midcoast Hunger Prevention Program
- Curt Dale Clark – Artistic Director, Maine State Music Theater
- Rev. Sylvia Stocker – Minister, Unitarian Universalist Church of Brunswick
- Kara Johnson – Director of Development, Midcoast Hospital
- Deborah King – Executive Director, Brunswick Downtown Association
- Jim Hornor – Co-Owner, Brunswick Inn and fundraising consultant
- Peter Ladner – Owner, Brackett Funeral Home
- Linda Smith – Business Development Officer, Town of Brunswick (joint interview)
- Jeffrey Hutchinson – Code Enforcement Officer – Town of Brunswick (joint interview)
- Kate Longley – Sr. Vice President for Finance & Administration & Treasurer, Bowdoin College

Questions asked in the interviews included the following:

1. How familiar are you with First Parish, its people, buildings and ministries?
2. What impact does First Parish have on the Brunswick community? What would be missing if the church were no longer here?
3. Have you had a chance to look at the information provided about possible building projects at First Parish? Do you have questions or comments?
4. If the church's building project were to include plans for space to be used by outside community organizations, who do you see taking advantage of that space?
5. What do you see as greatest challenges and opportunities facing downtown Brunswick today?
6. Are you aware of non-profit organizations in Brunswick who may be currently conducting or planning a capital campaign?
7. Are there other leaders in the community you feel it may be helpful to talk with about these questions?

The interviewees were very responsive and helpful. All had carefully read the material with the invitation letter. They recognize the historic and iconic presence of the church's sanctuary building, and to a lesser extent, Pilgrim House. They are familiar personally with pastors, leaders and key members of First Parish. All agree that, were First Parish to suddenly disappear from downtown Brunswick, there would be a hole in the fabric of the Brunswick Community. Several noted that members at First Parish also serve on boards such as Midcoast Hunger Prevention Program and Maine State Music Theater.

## **Key Learnings**

### *The impact of First Parish*

Unless the interviewee had direct experience of programs and people at First Parish (volunteers from First Parish to Midcoast Hunger Prevention programs, for example, or the church's membership in the Brunswick Downtown Association), he or she saw the church's primary impact on the Brunswick community through its historic buildings. Some pointed out that prominent members of the Brunswick community are also members of First Parish. Many indicated they are familiar with Rev. Mary Beard, Rev. Geoff Parker and Ray Cornils.

One interviewee, however, noted: "The Church has presence, but not influence."

### *The history of past building projects at First Parish*

Nearly all the interviewees volunteered that they were aware that First Parish had proposed some years back to unify its campus and remove the road that divides the sanctuary from Pilgrim House. They seem aware that the participants in the discussion included First Parish, the Brunswick Town Planning Commission, Bowdoin College and the Maine State Department of Transportation. Who was actually responsible for the final decision, which modified the traffic pattern around the sanctuary building but did not remove the "no name" road separating the Church campus, depends on whom you ask. Some thought the town was responsible, some thought Bowdoin College, and some the D.O.T. An interesting comment about the whole process came from one of the town staff interviewed, who said, "Sometimes I think we overthink things in Brunswick." This comment was echoed by another interviewee who said the culture in town is to "overprocess" decisions, which slows everything down.

**In the opinion of those interviewed, there is little point in revisiting the issue today.**

### *Views of the proposed building projects at First Parish*

In general, interviewees saw the sanctuary interior and accessibility issues as First Parish's prerogative, although several remarked that accessibility is "important to a graying population in the church and in the town." It should be noted that the Town Code Enforcement Officer

indicated that it would be a good idea to have the sanctuary plans reviewed by his office and the Fire Marshall's office for ADA compliance early in the process.

Possible plans for Pilgrim House elicited stronger responses:

- **Town staff indicated that any plans to demolish Pilgrim House and build a new building would face a lengthy and complicated review process under the "Village Review" requirements for the historic district.** Nearly everyone inquired about plans for parking.
- Several organizations considered ways their services might use renovated, accessible or larger space at Pilgrim House:
  - Conferences and break out space for 150-200 people with kitchen and accessible bathrooms. (Brunswick lacks such space)
  - Access to a Pilgrim House kitchen (if commercial-grade) for community events
  - Winter-time theater productions seating 200. Emphasis on accessibility, parking and upgrades to seating
  - Possible emergency "warming shelter" for the homeless in cooperation with Brunswick service agencies
  - Some non-profit service agencies may look for "satellite space" for their programs. Oasis and Independence Association were mentioned
  - Two interviewees asked about the continuing presence of Learning Land at Pilgrim House and what that agency's needs might be
- **Several organizations would like to be "at the table" if outside community organizations are invited to comment on plans for Pilgrim House.**

#### *Views of the economic health of downtown Brunswick*

Interviewees are "cautiously" optimistic about the economic health of downtown Brunswick. They are looking at the slow pace of growth and investment in Brunswick Landing and in downtown businesses. **Social service agencies point to the growing homeless population in Brunswick among singles and families who have jobs but cannot afford housing.** One said, "Just check out who's sleeping in their trucks in the Walmart parking lot!" It is interesting to note that several of these agencies (Midcoast Hunger, the Gathering Place, and Tedford Shelter) are now conducting or actively considering capital campaigns to expand their buildings and services. When we interviewed Karen Parker in her office at Midcoast Hunger Prevention, we saw boxes of food (soon to be distributed) stacked nearly to the ceiling of her office for lack of usable storage space.

#### *Other capital campaigns in the area*

There are a number of campaigns now underway or to be announced in the next year, though this information is not for publication on the FPC website.

**Although numerous organizations are seeking capital funds in the Brunswick area, it does not appear that there is direct competition for capital dollars with First Parish for a campaign in 2016 or 2017.** As one fundraiser sees it, lead donors in the Brunswick community each have a “top three” philanthropy list and share philanthropy dollars among their chosen charities.

**It does not appear that there are local grant dollars readily available for a building project at First Parish.** The Alfred M. Senter Fund gives to “cultural, educational and environmental” programs in the Brunswick area, but by reputation does not give to religious institutions. The Davis Foundation gives to “educational, medical and cultural/arts” charities across the State of Maine. The *Elmina B. Sewall Foundation* “supports work in Maine to improve the well-being of people, animals and the environment.” No other funds were mentioned.