

Goal BG 4 of 6:

Adopt a schedule for activities to improve and enhance the appearance of the building and grounds.

This goal would achieve a much more supportive and welcoming environment for members and visitors at relatively low cost. It is important at this stage not to put a lot of money and effort into enhancements that would be undone by major renovations. However, the appearance of the buildings and grounds could be improved dramatically with relatively low cost, especially if members continue to be willing to donate time and effort. Although there have been substantial efforts at cosmetic improvements and enhancements, this effort has not been part of a regular plan.

Short range activities/action plan (one to six months):

Identify desired enhancements, develop budget and time line for implementation, and start improvements.

Improve process for handling minor maintenance and repairs.

Remove current clutter and adopt procedures for minimizing and dealing with clutter. Clutter is defined as any item for which there is no foreseeable use within the next five years. It includes, but is not limited to, sets of encyclopedias, worn-out chairs and pews, ugly couches, presumably nonfunctional lawnmowers, and stocks of materials exceeding reasonable storage space.

Ongoing attention to these needs has been sporadic. It appears that RE has taken responsibility for the RE wing, Worship has taken responsibility for the sanctuary, and no one has really taken responsibility for enhancements to any of the rest of the buildings in any systematic way.

Resources needed:

Approximately \$2,000 for first stage.

Responsible for tracking progress:

Buildings and Grounds Committee.

Note: Due to an excessive backlog of work needed in this area, it is suggested that a number of targeted "cleanup and organize" days be established. The B&G Committee can organize the efforts, but will certainly benefit from substantial volunteer labor.

Medium range activities/action plan (six to twelve months):

Complete list of improvements.

Develop a clear understanding of buildings and grounds standards to be followed, including storage, cleanup, kitchen maintenance, and posting of signs, notices, and other short-term information.

<p>Resources needed: To be determined as part of the short-range plan.</p> <p>Responsible for tracking progress: See notes under short-range.</p>
<p>Long range activities/action plan (one to five years): Continue improvement activities on an annual or semiannual schedule.</p> <p>Resources needed: Cannot be determined exactly at this time.</p> <p>Responsible for tracking progress: See notes under short-range.</p>
<p><i>This goal is compatible with UUA principles, the UUFC mission statement, and the UUFC affirmation. It supports the following in particular:</i></p> <p><i>UUFC Affirmation: We will make ours a positive, welcoming environment – one that includes the diverse perspectives of our spiritual community and builds a sense of connectedness.</i></p> <p><i>UUFC Mission: “create a welcoming and engaging environment”</i></p> <p><i>UUFC Principles: Acceptance of one another and encouragement to spiritual growth in our congregations.</i></p>
<p>Additional comments, including any thoughts of how this goal is linked to other goals:</p> <p>This is one of the areas in which the dysfunctional committee structure reveals itself.</p> <p>Activities undertaken in support of this goal should be consistent to the extent possible with Goal BG2 (Green Sanctuary).</p> <p>Activities undertaken in support of this goal would need to be coordinated with any renovations to the buildings and grounds.</p>
<p>Goal BG <u>BG 5</u> of <u>6</u> Upgrade signage, including a UUFC marquee to inform passersby of upcoming events.</p>
<p>Short term activities/action plan (one to six months)</p> <p>Solicit ideas and bids for updated exterior signage, including supporting lighting. Select desired package and implement.</p>
<p><i>Note: In anticipation of comprehensive renovations, the intent here is to improve signage for the short term. More permanent and compatible signage would be part of the comprehensive renovation.</i></p>

Goal BG 6 of 6

Provide for an adequate heating, ventilation, and cooling (HVAC) system.

Short term activities/action plan (one to six months)

Solicit bids to provide for adequate HVAC in all areas of the building. Select contractor and complete work.

Note: In anticipation of comprehensive renovations, the intent here is to immediately provide for acceptable health, safety, and comfort levels throughout the building. This recommendation reflects an immediate and critical need. It is likely that eventual renovations would further upgrade and change the HVAC system, especially pending green design standards approval and implementation.

Topic: Finance

Preamble

Long Range Planning (LRP) is charged with providing guidance to the Board of Trustees on the Fellowship's finances. *Finance involves any and all revenues and assets belonging to the Unitarian Universalist Fellowship of Columbia (UUFC).*

Summary of Situational/SWOT Analysis

In this section we summarize our overview of the Fellowship's current financial situation utilizing the SWOT (i.e., strengths, weaknesses, opportunities, threats) framework. We base this analysis on input obtained at open sessions with membership, feedback from specific individuals involved in the Fellowship's finances (e.g., current/former finance committee members and treasurers), as well as reviews of existing records.

Strengths. The Fellowship's primary perceived financial strengths are the property on which it is located and recent improvements in the area of financial management and related procedures.

Weaknesses. The Fellowship's areas of perceived weakness are low revenue relative to needs and inconsistent financial management and associated procedures (though they have improved over time).

Opportunities. The perceived opportunities facing the Fellowship fall into three broad areas: (1) increasing the rate of giving among current members, (2) increasing membership as a means of increasing revenue (independent of the rate of giving), and (3) leveraging existing assets.

Threats. We conceptualize threats broadly to include both internal and external factors that may potentially hinder fulfillment of the mission. External threats include unexpected expenditures (e.g., catastrophe or accident) that exceed insurance coverage and cash-on-hand. Internally, perceived weaknesses relate to organizational culture, particularly processes for resolving conflict that may result in the loss of active, generous members. An additional threat involves financial record-keeping procedures and the potential for a loss of confidence in the Fellowship's ability to keep accurate accounts of contributions.

Summary of Goals

F1 of 3: Increase revenues to a level sufficient to provide the staffing, programming, and environment necessary to fulfill the organization's mission.

F2 of 3: Ensure that the tracking, recording, and reporting of all revenue and expenditures is consistent with applicable laws, UUA guidelines, and generally accepted accounting practice. These processes should be open and transparent to membership and other relevant stakeholders.

F3 of 3: Determine the monthly contributions necessary to support agreed upon long-range recommendations.

Goal F1 of 3

Increase revenues to a level sufficient to provide the staffing, programming, and environment necessary to fulfill the organization's mission. This goal is compatible with UUA principles, the UUFC mission statement, and the UUFC affirmation.

LRP recommends that the Board of Trustees focus on donations (i.e., pledged and unpledged individual giving) as the primary approach to generating its operating income. Donor giving is indispensable to the life of any donor-driven organization. All else equal, donors will fund a mission they find compelling and an organization they find worthwhile. Donations are an incomplete, but nonetheless important measure of the organization's progress in realizing its mission. Consequently we view actual and potential revenue sources currently outside the organization as important, but clearly supplemental (e.g., rentals, sale of assets, current non-members).

Goal F1 of 3

Short-range activities/action plan (one to six months): Build awareness of the funding shortfall and continue to promote the UUA giving guidelines.

1. *Build awareness of current financial situation.* Members should know how much the Fellowship must generate per annum to meet its projected needs, in per donor terms. This can largely be done with frequent and varied reporting of the Fellowship's current financial status beyond quarterly statements of individual giving. One possibility is a quarterly progress report of pledges and expenditures. It could be delivered in the space normally allowed for a pulpit editorial. A brief summary report could then be e-mailed and/or included in the subsequent Unigram.
2. *Promote the UUA's giving guidelines.* We encourage the Board to institutionalize current efforts to promote the UUA guidelines as minimal standards for giving.

Resources needed: Time, Data from Shepherd's Staff (or other databases)

Coordination between finance, the administrator in charge of tracking the Fellowship's expenditures, and worship to decide on the most appropriate format for verbal delivery.

Responsible for tracking progress: Board President (in consultation with others)

Delivery of such a quarterly report should be the duty of the President of the Board (with input from the treasurer, finance, and the administrator).

Goal F1 of 3

Medium range activities/action plan (six to twelve months): Reform the structure of the Canvass process, with the goal of making its administration year-round.

1. *Canvass reform:* The President of the Board of Trustees should appoint a member of the Board to serve as de facto Chair of the Canvass for the length of his or her term on the Board. The Canvass Chair chief responsibilities would be: (1) determine Canvass strategy, such as

selecting the theme and setting appropriate financial goals, and (2) select a sub-committee to carry out administrative (e.g., measurement, benchmarking, coordinating the calendar) and implementation tasks (e.g., kickoff celebration, training). The finance committee should have at least one representative on this sub-committee.

Resources needed: Essentially no *new* resources are needed to make this change in structure. The goal is a more efficient use of volunteer resources by spreading out the enormous tasks necessary for the Canvass over the entire budget year.

Responsible for tracking progress: The Canvass chair.

Goal F1 of 3

Long range activities/action plan (one to five years): The Board of Trustees should produce and distribute an annual report detailing the activities of the Fellowship's program related functions along with a detailed financial report (as specified in the section on leadership).

Resources needed: Cooperation and timely reports from all committees receiving funding from the Fellowship for the budget year on their activities, data from the administrator on expenditures, and data from Shepherd's Staff (and other databases) on contributions. *An end-of-year report from each committee should be a condition of good standing with the organization and continued funding.*

Responsible for tracking progress: The annual report is the responsibility of the President of the Board of Trustees.

Describe how this goal is linked to other goals:

The LRP sees the role of finances as instrumental in aiding the organization in fulfilling its mission. Though raising revenue is not the mission, each of the other major goals listed in this long-range plan is quite likely to require an increased operating budget.

Additional comments:

Other Efforts. Although donor giving should be the primary source of the operating budget this does not preclude supplemental funding efforts, which are by nature quite diverse. We offer the following guidelines for evaluating supplemental funding opportunities.

- *Is it consistent with our mission?* Any and all funding efforts pursued by the Fellowship, or in conjunction with any of its programs, should be consistent with its mission and with any applicable guidelines offered by the UUA. Given this, the organization should then privilege funding opportunities closest in spirit to the core features of the mission (e.g., the tradition of selling organic produce from local farmers is mission consistent in a way that selling some other products may not be).
- *Is it limited in duration and scope?* The UUFC's operating budget is and should remain derived primarily from member donations. Thus, non-donor funding (e.g., sales or debt)

should never be pursued to buttress the operating budget. Rather they should always be directed at some discernable publicly stated goal that is limited in both duration and scope. Funding opportunities that might challenge the primacy of donor-based funding of the operating budget should be given the strictest consideration by the Board of Trustees, and ultimately the membership, prior to acceptance.

- *Does it generate sufficient return?* Non-donor funding efforts should generate a return (financial, goodwill, publicity, etc.) sufficient to warrant utilizing the finite resources of the organization. Some estimate of this return, in the most precise terms available, should be part of the decision process.
- *Is it feasible within current capacity constraints?* The Fellowship must consider its capacity to carry out its responsibility in any funding efforts. Only if it has sufficient program expertise, appropriate staffing, physical space, and financial capital to meet any obligations should it consider any revenue generating opportunity.

Goal F2 of 3

Ensure that the tracking, recording, and reporting of all revenue and expenditures is consistent with applicable laws, UUA guidelines, and generally accepted accounting practice. These processes should be open and transparent to membership and other relevant stakeholders. This goal is compatible with UUA principles, the UUFC mission statement, and the UUFC affirmation.

Goal F2 of 3

Short-range activities/action plan (one to six months): Continue with current efforts to make reporting of individual giving consistent and timely.

Resources needed: No new resources needed

Responsible for tracking progress: Treasurer, Finance committee

Goal F2 of 3

Medium range activities/action plan (six to twelve months): Prepare for a professional audit-style review of financial record keeping at the Fellowship.

Resources needed: Accurate records of contributions and expenditures for specified period

Responsible for tracking progress: Treasurer, Finance committee

Goal F2 of 3

Long-range activities/action plan (one to five years): A professional audit of financial record keeping at the Fellowship.

Responsible for tracking progress: Treasurer

Goal F3 of 3

Determine the monthly contributions necessary to support agreed upon long-range recommendations.

Goal F3 of 3

Short-range activities/action plan (one to six months): Review cost of implementing LRP recommendations with the membership, including monthly income necessary to support those recommendations. Make final determination of LRP goals to be addressed based on membership's ability to meet expected financial obligations.

Responsible for tracking progress: Finance Committee

Goal F3 of 3

Medium range activities/action plan (six to twelve months): Begin collections of funds designated for specific goal areas (e.g., building funds, full staffing funds) to "bank" those funds for future expenditures. This activity may be described as a funds drive (e.g., a capital funds drive, etc.).

Responsible for tracking progress: Finance Committee

Topic: Membership Development

Preamble

Members are the heart and soul of any congregation. Their energy and spiritual gifts move the organization forward or impede its progress. Their generosity and faithfulness in supporting the fellowship sustain physical assets, nurture positive programmatic elements, and ensure a future for the organization. Members are the one element without which a spiritual community cannot exist. It is essential in planning long-term goals to examine the composition and characteristics of membership. Who are the members now; how do they interact with each other and the community; what do they, individually and communally, want from membership; how can they be nurtured and encouraged; how can they be challenged to deeper levels of commitment to the fellowship; what is the optimal number of members to advance the identified goals and concerns of the fellowship; and what methods can be employed to invite and retain members to achieve the optimal congregational size?

Analysis of strengths, weaknesses, opportunities, and threats (SWOT)

In looking at membership, input received was examined in terms of member characteristics, structural characteristics and assets (defined as physical structures or programs currently in place and functioning).

Strengths

Identified strengths of the UUFC membership include a highly educated and spiritually diverse group of individuals constituting a core of dedicated members who participate in leadership, fellowship, stewardship, and communal and individual spiritual development and worship. There is good institutional memory, with members who participated in the establishment of the fellowship and remain to sustain it. There are new members who come to us with energy and excitement about finding the Unitarian Universalist faith. We have active pledging by about 90 pledge units and contributions by non-pledging members, friends and guests. Many members are active in community service and social action and are known in the community for their talents and activism. We have strong links to the University community, with more than a few members who serve as educators and administrators there.

Structural characteristics of our congregation that are seen as strengths for membership development include a warm and welcoming part-time minister and talented guest ministers and lay discussion leaders. We have several active committees investing time and energy in the fellowship. There are social opportunities such as the September set and supper club; adult education opportunities such as the forum, book discussion groups and spiritual exploration interest groups; and participatory opportunities such as choir and religious education. Efforts have been made and are underway to maintain better records related to attendance and pledging, to improve new member contact and orientation, and to provide opportunities for discussion among members about shared goals and visions. Assets to support membership development include our communication outlets (the

Unigram, Sunday bulletin, the “wayside pulpit,” and informal email trees); our desirable central location in a neighborhood with demographics favorable to our attracting visitors and new members; and a building with “room to grow” – capacity to absorb higher attendance at worship services, religious education, social events, and community accessible programs (UU Coffeehouse, rentals, etc.)

Weaknesses

Identified weaknesses for membership development related to membership characteristics are indirect communication and triangulation among members, a lack of modeling of what it means to be a good member, inactivity and lack of commitment by some members, and reluctance to directly address issues in a manner consistent with UU principles. Structural characteristics which contribute negatively to membership development were identified as a lack of vital information about current members and friends, guests, new members and inactive and resigned members; gaps in programs that nurture membership such as religious education, nursery, new member orientation and integration, adult religious education, meaningful and consistent rituals, and inclusive and welcoming social activities; lack of policies that clearly define membership, desired levels of participation, leadership development and continuity of congregational management and planning; and poor development and maintenance of avenues for outreach and publicity such as the website, community media outlets, and strategic advertisement targeted to an identified demographic desirable to our fellowship.

Opportunities

Member characteristics perceived as opportunities included our fellowship’s diversity of spiritual paths, member talents and leadership skills, and the number of members associated with institutions demographically attractive to our fellowship (i.e., universities, state government, business community, and service organizations). In terms of structural characteristics of the fellowship constituting opportunities for member development, input sessions noted the possibility of redefining and invigorating membership through a thoughtful and measured examination of our individual and corporate strengths and potential; campus ministry and outreach; access to The Mountain for retreats and leadership school; the UU Coffeehouse and community rentals; the potential for new ritual development and support for established rituals; the possibility of conducting an inventory of member skills and interests with an eye to leadership development; the hiring of a new RE director to lead a comprehensive program of religious education for our young people; review of congregational policies and procedures and development of consistent programs for member development, especially as it concerns new member orientation and retention of current members; and the possibility of hosting interfaith activities, a natural community building activity for our faith tradition. Existing assets which could be deployed in membership development include our display area in the social hall, new progressive community media outlets, our visible location with the wayside pulpit which could be developed to communicate information about our activities and events; and our website and Sunday bulletins, along with possible development of online information gathering and dissemination venues such as listservs or online groups.

Threats

Input on threats to membership development produced two main problems in terms of member characteristics – ineffective communication (i.e., complaining rather than discussing issues) and complacency (inaction in the face of obvious problems). Structural membership issues perceived as threats included lack of a consistent organizational structure understood and affirmed by the membership; poor leadership development and continuity of knowledge transfer to new leaders; low morale generally; failure to regularly and consistently collect and act on feedback from the membership; lack of respect for the services, rituals, and worship space; lack of participation by the complete membership (rather than just a few traditionally active members); inconsistent quality of programmatic offerings; lack of affirmation and recognition for the positive and nurturing contributions of members; and the possible loss of our “niche” to other progressive religious bodies operating effectively in the community and attracting our demographic away from the UUFC. Threats to membership development in terms of assets were primarily perceived as poor condition and unattractiveness of the physical plant – worship space, outdoor areas, classrooms and social area.

Discussion

The UUFC appears to be on fairly solid footing in terms of membership, with the aforementioned core group of faithful, supportive members and the potential for attracting new participating members. The main issues to surface during input sessions and committee discussions are the need for dependable and ongoing data collection efforts regarding member demographics, participation and leadership potential; a clear and concise definition of what membership means on all levels; and a well-defined goal for membership development consistent with UUFC capacity and expressed desire for growth.

Goal # M1 of 4:

Collect and maintain significant and useful information on the current membership.

Short range activities/action plan (one to six months):

Update membership information, including membership status (i.e., active, inactive, moving to “friend” status, etc.), and current contact information for directory.

Resources needed:

Information on the current member database and member volunteers to conduct review and report results.

Responsible for tracking progress:

Membership committee.

Medium range activities/action plan (six to twelve months):

Identify member needs, wants and assets that may be used for the good of the congregation. Analyze and report results.

Resources needed:

Volunteer(s) experienced in research and analysis to collect information and formulate report of findings as they relate to membership development.

Responsible for tracking progress:

Board of Trustees

Long range activities/action plan (one to five years):

Conduct yearly updates and reports. Use the information in ways that have benefit to the UUFC and its members.

Resources needed:

Same as for short and medium range activities.

Responsible for tracking progress:

Membership committee and Board of Trustees.

Additional comments, including any thoughts of how this goal is linked to other goals:

There is a need for a determination of true membership status for the entire congregation and a concomitant need to remove from active status those who self-identify as non-members, those who have not been involved in any activity in the fellowship for a pre-determined period of time, and those who wish to remain connected to the fellowship as "friends" rather than members. Individuals counted as members on our rolls create obligations for the fellowship in terms of district and national dues and expenses and also create expectations about the ability of the fellowship to sustain its goals and objectives through monetary gifts and gifts of time and talents. A realistic assessment of membership assets requires that membership be defined very clearly and that at least annual reviews of membership be conducted to provide this very necessary information to the Board.

Goal # M2 of 4:

Formally define membership in the UUFC and communicate desired level of participation by members in actively supporting the fellowship by attending services and programs, by providing financial support sufficient to underwrite the goals and mission of the fellowship, and by commitment to Unitarian Universalist principles in all interactions between members of the fellowship.

Short range activities/action plan (one to six months):

The board should undertake to develop a membership definition statement to be included as part of the congregational by-laws.

Resources needed:

Board member volunteer(s) to develop and write statement.

Responsible for tracking progress:

Board of Trustees.

Medium range activities/action plan (six to twelve months):

Membership definition statement should be presented to the members at annual meeting.

Resources needed:

Agenda space at annual meeting; duplication of document for dissemination.

Responsible for tracking progress:

Board of Trustees

Long range activities/action plan (one to five years):

Membership definition statement should be provided to all current and potential members and the defined desires level of participation by members should be encouraged and reinforced to members in the development and furtherance of congregational goals and objectives.

Resources needed:

Written copies of membership statement included in venues accessible to members (i.e., website, official records, membership directory, etc.

Responsible for tracking progress:

Board of Trustees.

Additional comments, including any thoughts of how this goal is linked to other goals:

A clear and unequivocal definition of membership will allow the Fellowship and the Board to move forward with the stated goals and objectives of the long range plan and will encourage and guide those who are unsure of their own relationship to the Fellowship to commit to membership or clarify their own need and/or desire for connection to the UUFC. A membership definition statement that embodies Unitarian Universalist principles, our covenant with each other, and the mission of the Fellowship should encourage and uplift the members and inspire confidence in and respect for membership status. A warm and welcoming definition of "friend" status should permit and encourage continued involvement with the Fellowship for those who wish us well and want to remain connected.

Goal # M3 of 4:

Define membership goals (i.e., what does the UUFC intend to provide for its members?).

Short range activities/action plan (one to six months):

After review of the long-range planning recommendations, the board, with the advice and help of the membership committee, should set a short-term membership goal.

Resources needed:

Time for review and analysis of long-term planning recommendations; consensus of board.

Responsible for tracking progress:

Board of Trustees.

Medium range activities/action plan (six to twelve months):

Specific membership development activities should be defined supporting the stated membership goals of the Fellowship

Resources needed:

Volunteer(s) to formulate a program for outreach and leadership training to encourage membership development and promotion of the Fellowship in the community.

Responsible for tracking progress:

Board of Trustees

Long range activities/action plan (one to five years):

Review other aspects of the UUFC to determine if membership needs are being addressed.

Resources needed:

Same as for medium range activities.

Responsible for tracking progress:

Membership committee and Board of Trustees.

Additional comments, including any thoughts of how this goal is linked to other goals:

Once a membership goal has been stated, a program of development activities must ensue to invite, encourage, and retain members who will contribute not just in numbers but also in quality of engagement and support for the improvement of our relationships with each other, our programs and activities, and our impact on the wider community.

Goal # M4 of 4:

A membership package should be developed and used consistently to welcome and introduce visitors and potential members to Unitarian Universalist principles and concepts, the history of the church, the structure and organization of our Fellowship, and the path to full engagement as a member in the UUFC.

Short range activities/action plan (one to six months):

Review materials available from national and our own materials currently being used to connect with potential and current members. Develop a draft recommendation for what should be included in the membership package.

Resources needed:

Volunteers and/or Board members hours for collection, review and analysis of materials

Responsible for tracking progress:

Board of Trustees.

Medium range activities/action plan (six to twelve months):

Adopt and put into use the recommended materials. Train individuals involved in greeting, contacting and encouraging new members in the use of the materials.

Resources needed:

Volunteer(s) and/or Board or Membership Committee participants with time to implement the use of materials and train others in their use. Printed materials from national and printed copies of materials specific to the UUFC as well as online versions posted to the website for easy access.

Responsible for tracking progress:

Board of Trustees

Long range activities/action plan (one to five years):

Continue to review and update the membership package, with attention paid to the value of materials in engendering the desired response. (Are mail-in cards used? Do visitors pick up materials and take with them? Do greeters and board members know where to obtain materials and do they routinely get the materials in the hands of visitors and potential members?)

Resources needed:

Same as for medium range activities.

Responsible for tracking progress:

Membership committee and Board of Trustees.

Additional comments, including any thoughts of how this goal is linked to other goals:

Visitors are engaged while they are with us by our personal contacts with them, but they can be encouraged, mentally and spiritually stimulated, and attracted to our Fellowship for a return visit by what they take with them when they leave. Materials that are attractive, informative and clear about who we are, how we conduct our search for truth and meaning, activities and programs that we share with each other, and opportunities to become more engaged in our community will provide a tangible way to bring them back to us to explore the possibility of membership.

Appendix A

Input Sessions

Including information received during verbal input sessions, and in writing

Note: Contributors are listed at the end of each input topic

Leadership

Following is a summary of input on the topic of "leadership". Members provided this input during scheduled discussions, and in writing.

Strengths

Currently: strongest leadership in years

Bylaws structured to spread leadership, e.g., co-council, chairs do not serve as board members, broad leadership

Over the years, there is a core that sticks through thick and thin

Strong lay, as well as paid, leadership, e.g., Neal Jones

Strong core of volunteers who work to keep things going

Some committees are hanging in there

A real commitment to doing things democratically

No rushing to rash and ill-considered decisions

Strong pulpit presence – ministerial leadership – e.g., research on how other churches handle issues

Board has made an effort to communicate with the congregation

Occasionally – maybe a strength – continuity in leadership, e.g., treasurer who repeated several terms

Reasonable number of new members who are potential members

Pretty good working relationship with other UU churches in the area

Funds dedicated to send people to leadership school

Paid all of our dues last year

Written input:

Wide cadre who have served in leadership

Balanced board: gender/age/UUFC affiliation

Board policy manual begun

"Board notebooks" begun

Bylaws analyzed and board and officer tasks/responsibilities highlighted

Visual display on social hall bulletin board

Isabel is very competent and easy to work with

Neal is terrific

Weaknesses

Not enough continuity of leadership from one presidency to another

We have never had explicit leadership development

We are not attentive enough to bylaws and procedures – to do so would take the

"personality" out of decisions – we are too casual

Bylaws have a few real problems, e.g., committees, how to get chairs (anticipate written list from Don Mohr)

Not enough congregational meetings – we should have them at least quarterly for each party to know what the other is thinking

We talk and talk, but do not follow up

We do not keep track of decisions

We do not have a system for keeping up with decisions, even knowing what they were

Bulletin boards are not an effective way to support information flow
Posted information on bulletin boards may be dated, may not get refreshed as needed, including committee information
Unclear what the board is supposed to do
Unclear how the board's performance would be evaluated
No universal understanding of our way of making decisions ("congregational polity")
No way to resolve conflicts
Disagreements carry over into personal conflicts
No clear way for individuals to resolve differences
No "feedback loop" to communicate resolution
Problems in committee structures -- issues fall between the cracks (Caroline Eastman may provide specifics)
No shared understanding on how boards vs. committees make decisions, e.g., can a chair make a decision? Unclear lines of authority
Individuals should not make decisions
Board needs to motivate volunteers
Too many committees

Written input:

Many highly invested leaders depart UUFC
Lack of continuity from board to board
Insufficient and timely training
Website not up to date
Committee structure still unclear -- especially record keeping, continuity, and incorporation of new committee members
Too few hours for the administrator
Lack of a full-time minister
Difficulty finding the correct person to take a concern, issue, or idea to
Sometimes the person in a position of leadership is not the "right" person for the job
In the absence of clearly knowing who and where to take ideas to, you end up getting mixed responses from the individuals you talk to -- some seem interested and supportive, others seem unresponsive
The UUFC has a "scarcity" mentality -- everything looks dumpy/shabby; decisions are made "on the cheap"

Opportunities

The LRP is an opportunity to analyze and make decisions
A consultant has recommended that the board should not make any decisions on issues that have not come through committees first -- we could strengthen committees, and give them clear authority, so that the board is not micro-managing
We could improve by sending people to leadership school, someone do leadership training each year for new committee members
Building community is an opportunity -- make it more clear how the community functions, so that people can see how they want to fit in -- defining who we are as a community is a real opportunity
Member orientation/community building

Better communication for improved congregational involvement
Do a flow chart of our organization showing how things get done
Have a visual display to assist
Webpage needs to be up-to-date
Opportunity to have a full time minister in the near future/next few years
Examination of relationship between committees and board can be examined and improved
Opportunity to examine and improve our bylaws
Bylaws could be streamlined
LRP process gives us an opportunity to address many of the identified weaknesses
Written input:
Review other ways to organize the work, i.e., more than finite committee tasks, e.g., consider structure of “ministry” as in the Augusta UU
Pursue idea of nominating committee as leadership development
With a strong administrator and fulltime minister, lay leadership would function better
Having a list, perhaps in the Unigram or website, of whom to go to for what would be very useful. An example of this is found on the All Souls Washington DC website, under the “leadership” section

Threats

Lack of implementation of any plan, whether due to resources, personnel, or whatever
We try to do too much – we must prioritize
Too few people with too much information
Idea that “information is not shared”
Communication is a “two-way street” – information is out there, but we have to take responsibility
Our dysfunctions are “profitable” – they are paying off for somebody somewhere – there is a lot of “organizational culture” that has to be dealt with – the real threat is resistance to change
We have struggled with the transition to being a middle-sized church – some may hold on to the virtues of a small group, and resist the virtues of a middle-sized group
The level of trust varies
In some areas the congregation is too dependent on a limited number of people
A tiny handful of people can wreck the entire process
We have not spread the base of our finances far enough – we worry that we are at the mercy of a few who might stop giving
Some members struggle with trusting an organization; they are not comfortable with trusting the organization
We have not recognized and appreciated efforts of many – if they are not appreciated, they just quit/leave
If we continue to act “poor”, and nickel and dime everything we do, it holds us back
When communication “comes to you”, there is no place to take it

Written input:
Bylaws will remain inconsistent
Same-old-same-old

Hurt feelings will remain unresolved

Elected leaders will be unclear what they are getting into until it is too late

When someone feels that one person rebuffs their ideas, resentment builds – we need to develop an organizational way to address ideas so that the response is not done at the “person to person” level

The following members contributed input on the topic of “leadership”

Mike Paget, Ann Cargill, Alice Leeper, Ann Johnson, Joe Long, Caroline Eastman, Pat Mohr, Ruth Thacker, Sandy Chubon, David Crockett, Mary McGriff, Carita Barr, Kathy Paget, Peter Kandis, Glenn White, Sej Harman, Regina Moody, and Tootsie Holland.

UUFC Long-range Planning Committee
Growth Input Session 03/09/2006

<p>Strengths:</p> <ul style="list-style-type: none"> Opportunity for programs, i.e. open to diverse/new programs Opportunity for inclusion Good reputation in community Family values Good frame/skeleton Well-defined niche Deal with issues/ orderly Unique offering Solid core of members History to share – more than “new age” Regularly have new people Illustrious members Wealth of programming resources Good connections Strong national organization Strong convictions 	<p>Weaknesses:</p> <ul style="list-style-type: none"> Apologetic about who we are Worried about our image Hard to understand as religion Offend some Christians Embarrassed Inarticulate Anti-evangelical Programs don’t translate to members Majority members are introverts Do poorly at accommodating diverse worship styles Apologetic about demographics Apologetic about not being Christian Anti-Christian bias Elitist Don’t admit weaknesses Written input received: Some perceive that the leadership is not open to different perspectives
<p>Opportunities:</p> <ul style="list-style-type: none"> Develop elevator speeches University Natural to do interfaith Campus Ministry Columbia is growing New people to the area are more likely to fit us Young people are seeking non-traditional religion Developing pragmatic opportunities Links to external causes More public relations GLBT are looking for a home Extended programs – Theater More discussion groups Unitarian Universalism for adults Folk choir DRE Social action focus (possible faith-based grants) Modified/more diverse worship programs 	<p>Threats:</p> <ul style="list-style-type: none"> Surrounding community biased against non-Christians Isolationism Theological diversity leads to paranoia Media ignores us Fear of unknown by newcomers Bias against integrated congregations Racism against us Internal complacency Lack of energy to grow Cramped/limited facilities

The following members contributed input on the topic of “growth”

Anthony Houser, Cheryl Soehl, Caroline Eastman, David Crockett, Glenn White, Joe Long, and Tootsie Holland.

LRP input session

Topic: staffing/religious education leadership/human resources

Date: 3/16/06

Strengths	Weaknesses
Neal Jones and Doug Riesner Many past presidents are members Isabel Oake Dedicated current staff Staff are willing to cover gaps Strong committees back up when we do not have staff Religious education volunteers go above and beyond in their willingness to teach and do the labor intensive work required – this causes them to miss the adult service Religious education committee is organized and works diligently (new) employee handbook John Squires has a long history with the building gives him great knowledge Have extra savings for (future) DRE salary Good current communication between paid staff, board, and committees Consensus to hire DRE RE is a good program Strong curriculum Emphasis on religious education vs. proselytizing Rotation in activities including 2 Sunday school days, 1 chapel day, and 1 social action day per month Current RE chair is strong, and the incoming RE chair is also strong Have a good idea of what we want in DRE	Lack of employment supervision Questions regarding custodial supervision/outcomes Poor membership ethos regarding all taking responsibility for cleaning, which takes away some of the already limited paid time for custodial work No clear lines of responsibility and supervision for any staff, resulting in difficulty knowing what staff are to be responsible for Lack of a consensus regarding part or full time positions Historically, the low salaries we pay – not up to UUA standards Lack of paid nursery staff Difficulty scheduling nursery staff Lack of paid minister of music Difficulty getting committed volunteers – volunteer coordination is difficult Over-reliance on volunteers Lack of recognition for volunteers Clear and consistent risk management policy implementation Under-reliance on volunteers – too often specific individuals just “do it themselves” instead of relying on volunteers Lack of conceiving of volunteerism as ministry Need someone to do background checks Lack of “communitarianism” RE and church services are scheduled at same time Criticizing and rumors are demoralizing to paid staff <u>Written input received:</u> Those who have done the hiring in the past had no experience with hiring or firing, so mistakes have been made, e.g., no background checks

<p>Opportunities</p> <p>New DRE soon</p> <p>Full time minister</p> <p>More fundraising</p> <p>Opportunities to revisit/redefine leadership/volunteers/paid staff/congregation relationships</p> <p>Opportunity to rethink definitions of paid staff needed, e.g., office administrator or congregational administrator</p> <p>Full complement of RE teaching volunteers</p> <p>1/3 of teaching volunteers are males</p> <p>Opportunity to train volunteers for tasks they may not feel comfortable or competent with, e.g., nursery work</p> <p>Full coverage for the five-day work week, a guarantee that a paid staff is here during all normal working hours</p> <p>With retirement of custodial staff, opportunity to clarify position and role</p> <p><u>Written input received:</u></p> <p>The current personnel committee has experienced members</p>	<p>Threats</p> <p>Hiring the wrong person</p> <p>Hiring a minister who does not include the full package of intellectual, spiritual, and pastoral care</p> <p>History of some conflicts within the membership regarding what they want in a minister</p> <p>Possibility of losing Neal Jones, who may have a package we might want/need</p> <p>The low salary that we traditionally pay for a minister has put us in a position of only being able to hire young, low-pay accepting, ministers</p> <p>Unwillingness to “sit through” things/services that we personally might not like, e.g., sitting in the social hall because we happen not to like the day’s sermon topic</p> <p>Unwillingness to support diversity of experience</p> <p>Poor enforcement of policy, e.g., SLED checks on volunteers and staff – you are asking for difficulties/problems</p> <p>Lack of checks and balances on decision making</p> <p>Lack of a qualified pool of applicants for positions</p> <p>Lack of strong finances to appropriately pay quality staff</p> <p>Lack of a strong enough financial package to have strong and supervised employee expectations, including advancement plans and evaluations</p> <p>We do not have enough funds on hand to pay salaries into a twelve month future, and continuing year-to-year</p> <p>Hiring non-members for their neutrality – we do not do that</p> <p>Unclear lines of authority and supervision leaves staff in vulnerable positions</p> <p>The big picture – all the areas of input clearly link together. If we falter in one area, it affects other areas. If we have a poor level of staffing, it impacts ambitions in other areas.</p>
---	--

	<p>In the UU, there is no one leader of person to blame. If we have a problem, each member bears responsibility.</p> <p>Many members may be very comfortable with our perceived level of dysfunction.</p> <p><u>Written input received:</u></p> <p>Leadership dealing with people they know instead of dealing with people who are competent</p>
--	--

The following members contributed input on the topic of “staffing”

Mike Paget, Sandy Chubon, Ann Cargill, Barbie Seymour, Janet Swigler, Carita Barr, David Crockett, Cheryl Soehl, Peter Kandis, Sej Harman, and Tootsie Holland.

Strengths	Weaknesses
Paid for	RE wing in bad shape – roots in foundation, mold (?), repaired termite damage
Location	Archaic heating and cooling
Main building in good shape	Lack of coherent interior decorating
Visible to passersby	Sanctuary seating is ugly and uncomfortable
Design	Electrical service needs updating
Historical value	Lighting is dated and ugly
Members have put sweat-equity into it	Sanctuary and social hall are not sound-isolated
Responds well to attention and care	Kitchen – old, seriously needs updating, cabinets are in very poor shape
Most things can be fixed relatively cheaply	Storage is severely lacking
Large (ground) footprint	Building is not clean and well-maintained
Great trees	Grounds are shabby – no plan, ugly
Barriers between UUFC and neighbors	Poison ivy
Large playground	RE furniture in bad shape
Diverse meeting spaces	Wooden chairs are in bad shape
Well situated on property	Bathrooms: small, no hot water, lack of privacy
No asbestos (we think)	Offices are in rough shape
Good roof (ten years?)	Chancel is not accessible
We have the original architects drawings	Inadequate parking
Nice piano	Handicap parking is not adequate
Stage area	Driveway is falling apart
Ability to tackle a project, e.g., library roof	Sound system is old/lacking
UU members are good at capitol fundraising	Old energy leaking windows
<u>Written input received:</u>	Outside lighting is very poor
Tremendous potential to be an attraction instead of a rundown looking building	Lack of updated looks
	<u>Written input received:</u>
	No one cares about the problems

<p>Opportunities</p> <p>Weaknesses are easily corrected</p> <p>Available space to create parking</p> <p>Strong mortgage value</p> <p>Repairs/updates are opportunities for community building through sweat-equity</p> <p>Location – in more progressive area, near USC</p> <p>Chance to re-examine how we organize to take care of buildings and grounds (committee?)</p> <p>Green design principles</p> <p>Human capitol</p> <p>Cash on hand is adequate and appropriate to pay for a design study</p> <p>With a more attractive building and grounds, more rental income can be expected</p> <p>UUFC could provide an attractive (religious) sanctuary facility for those who do not wish to be part of more mainstream religious groups</p> <p><u>Written input received:</u></p> <p>Start with cheap cosmetics, e.g.:</p> <p>Lighten up the entry area, colorful rug, better looking display tables, paint wood light, big artificial trees</p> <p>New heating and cooling might pay for themselves in savings and efficiency</p>	<p>Threats</p> <p>No additional space/land is available</p> <p>Poor committee structure/function allows confused responsibility</p> <p>The inertia to complain is easy</p> <p>We need to take action, not just do another plan</p> <p>Opposition to plans/projects</p> <p>We struggle to not look affluent – do we have a “hippie” mentality?</p> <p>The shabby look is a threat to new members and to keeping current members</p> <p>Potential for injuries in a poorly maintained building</p> <p>We have many “unwanted donations” (e.g., old furniture)</p> <p>Packrat mentality</p> <p>Custodial care is poor</p> <p>Hard workers get overworked and worn out</p> <p>There is limited “thanks” for volunteers</p> <p>To stay or sell and move – Do we have a consensus?</p> <p>Thinking “small” – nickeling and diming it</p> <p>Lack of a comprehensive plan</p> <p><u>Written input received:</u></p> <p>Money will be lost into salaries and insurance</p> <p>No current termite bond</p> <p>Electrical supply is so out-of-date and against code that if we had a fire, insurance might not pay</p> <p>Lack of interest by the Board</p> <p>“Behind the scenes” leaders do not care</p>
---	---

The following members contributed input on the topic of “buildings and grounds”
 Caroline Eastman, Mike Paget, Alice Leeper, Don Mohr, David Crockett, Joe Long, Regina Moody, Cheryl Soehl, Sandy Chubon, Dwight Pregler, Peter Kandis, Janet Swigler, Tootise Holland, and Betty Glad.

Long Range Planning Input session: February 2, 2006**Topic: finances**

Strengths Own the building Balanced budget By paying UUA dues, we have access to grants and low-rate loans Progress towards computerizing data Training for finance committee Moving towards database of members to allow accurate accounting Active finance committee Rental income Shared responsibility by finance committee Current: low outgo due to part-time staff	Weaknesses Better tracking of contributions needed Not enough \$ to support desired staff We act poor Lack of specific pledging amount guidelines Lack of clarity regarding needs We think short term instead of long range Different ideas about goals/priorities Low membership = low \$ Lack of accurate and available finance information Low morale <u>Written input received:</u> Members do not give much because they do not get what they could The place looks rundown – you don't feel good entering it The old ideas for raising money are not working
Opportunities Lots of potential new members in area Potential for positive response to PR Start new members with pledges Create an annual community festival like the Greek festival Good parties generate fun and money Lots of visitors = potential members Mortgaging the building would bring funds Valuable property could be sold, partially or totally <u>Written input received:</u> Two good ministers currently Some new ideas might help raise money	Threats Members stop calling and no one calls Not enough glamour Fear of taking a risk Major catastrophe would hit hard Low morale Nay-saying Security Reduced giving due to conflicts Lack of clear channels for problem solving Too many rumors instead of problem-solving <u>Written input received:</u> We lose good people

The following members contributed input on the topic of "finances"

Sandy Chubon, David Crockett, Buzzie Kelly, Linda Brinnison, Carita Barr, Mike Paget, Don Thacker, Betty Glad, Ann Cargill, Janet Swigler, Joe Long, Sej Harman, Caroline Eastman, and Tootsie Holland.

LRP input session

Topic: membership development

Date: 2/16/06

Strengths	Weaknesses
<p>Welcoming minister Making more efforts to greet visitors Consistent with orientation Strong dedicated core of members (Core = 90 pledge units; good institutional memory, long perspective; present and active and concerned) active group of young members (new) forum September Set, choir, supper club, Unigram Email communications, website Several committees currently seem active (worship, finance, membership) We are tracking attendance routinely Programs bring potential members in Coffeeshouse exposes non-members to UU Members and members are visible publicly Many Uus do important community work Wayside pulpit gets people's attention Social gatherings are good Individual gifts/talents shown in after-service activities Social action activities Highly educated/talented congregation</p>	<p>Lack of DRE director Nursery staff not consistent Retaining membership Nurturance/outreach/taking care of each other is inconsistent/haphazard Lack of a policy for dealing with difficult people (in process) Indirect communication/triangulation is a problem Date keeping-computer is inadequate – lack of organization/not systematic Too easy to become a member/stay a member Too many inactive members We integrate new members poorly We do not have an “orientation class”, especially if you are new to Uuism Website is not up-to-date and not interesting Our organizational culture is dysfunctional: limited set of expectations about what constitutes good membership Lack of modeling what is a good member Lack of incentive to become active We do not always know why people leave Lack of information about members/talents New committee members/chairs do not always get clear information about what is expected – poor organizational development We do not know how to promote ourselves Lack of campus ministry, both faculty and students <u>Written input received:</u> Some members are resistant to change</p>

Opportunities	Threats
<p>We have an interesting opportunity to “reformulate ourselves” – ferret out the dysfunction/self-examination</p> <p>Campus ministry</p> <p>Leadership school at The Mountain/access to retreat facilities and training</p> <p>Coffeehouse for promotions</p> <p>Committee “fair” – to explain</p> <p>Website, Sunday bulletins – opportunities for good and impressive communications</p> <p>Better mingling can cultivate members</p> <p>Better recognition of new members</p> <p>Display space in social hall</p> <p>Defining what “membership” is</p> <p>New/progressive community media outlets</p> <p>Opportunities in adult RE</p> <p>Well defined appropriate sized opportunities – helping members feel that their talents and interests can be used</p> <p>Visible corner – promote what is happening here, e.g., upcoming programs/sermons</p> <p>Rituals would be of interest</p> <p>Diversity of spiritual paths</p>	<p>Complaining, difficult people - rumors</p> <p>Metropolitan Community Church may now be “competition” as a progressive church</p> <p>Complacency is a threat</p> <p>Asking for feedback – a threat if we don’t</p> <p>We don’t nurture our community</p> <p>Dies a slow death from low morale</p> <p>Too many superficial interactions</p> <p>We drop the ball on good things that we do, e.g.,</p> <p>Lack of organizational structure is a threat</p> <p>Building threats – poor heat/air/ugly</p> <p>Lack of soundproofing from social hall during services</p> <p>Lack of respect for the service – interruptions, latecomers</p> <p>Lack of widespread participation</p> <p>Lack of recognition/affirmation</p>

The following members contributed input on the topic of “membership”

Janet Swigler, David Crockett, Cheryl Soehl, Sandy Chubon, Joyce Rodgers, Larry Siegel, Mary MacLachlan, Caroline Eastman, Peter Kandis, Gertrude Edge, Carita Barr, Mike Paget, and Tootsie Holland.

Appendix B

References

Mann, Alice, Raising the Roof: The Pastoral-to-Program Size Transition (Bethesda, MD: The Alban Institute, 2001)

Skinner, Donald E., "Giving Plate Away Ups Donations." UU World, July/August 2003, 49.

Mann, Alice, Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations (The Alban Institute, 2003)

UUA InterConnections: Colorado Church Treats Volunteers with Care (shared ministry facilitator)

<http://www.uua.org/interconnections/nourishing/vol8-3-nourishing.html>

<http://www.uua.org/programs/ministry/finances/index.html> (job descriptions, salaries)

<http://www.uua.org/programs/ministry/reco/> (RE credentialing)

<http://www.uua.org/TRUS/youth/resources.html> (youth ministry)

<http://www.uua.org>

<http://uuministryforearth.org>

UUFC Cottage Meetings—Visioning Process, Fall 1998

UUFC Capital Committee Study, Summer 2002

Membership and attendance data for 2004-2005

Lloyd Report

Appendix C

Executive Summary

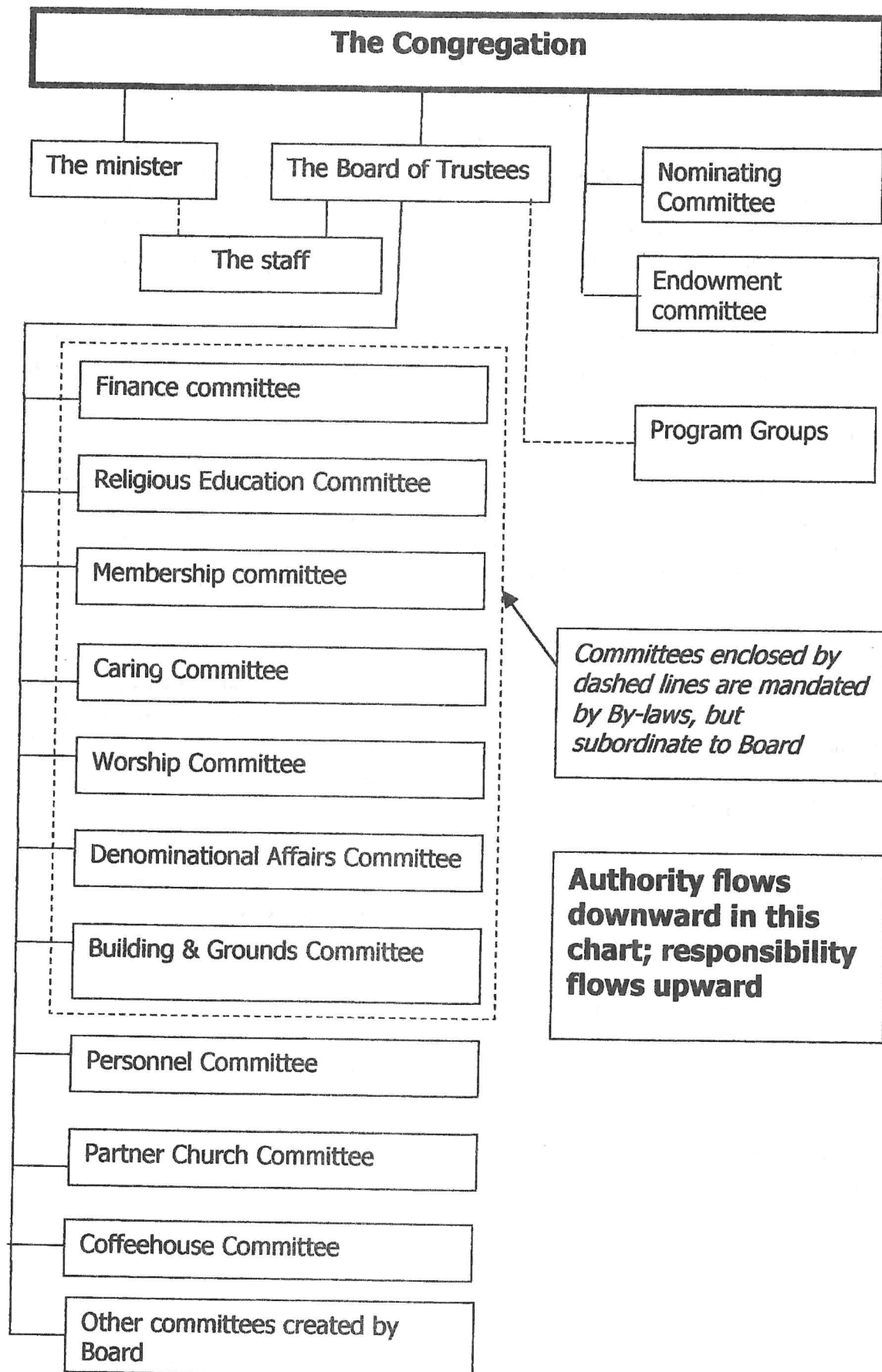
Long Range Plan

Unitarian Universalist Fellowship of Columbia

Executive Summary

Presented to the Board of Trustees

April 12, 2006



Overview

The Unitarian Universalist Fellowship of Columbia (UUFC) was established fifty-six years ago. During its history the UUFC has experienced significant growth, and more recently, a slight decline in membership. Membership currently stands at approximately 150. While there seems to be very little sentiment to “grow for growth’s sake”, there is a strong sense among members that many individuals in the Columbia area might find a church and spiritual home at the UUFC. There is a sense that our membership is poised for growth.

Periodically the fellowship has undertaken various forms of self-review. Whether to refocus the mission of the UUFC, to solicit feedback from members regarding how the church is meeting members’ needs and desires, or to simply regroup, the UUFC has many documents that summarize past reviews.

In August 2004, the minister of nine years, Rev. Patrick Price, resigned. Between that time and the fall of 2005, there was a growing sense that the UUFC needed a long-range plan. To better serve the membership within the UUFC, and to review our relationship to the community beyond the UUFC, the Board of Trustees (“Board”) convened a Long Range Planning team in November 2005.

The Long-Range Plan (LRP) Team

UUFC members interested in serving on the LRP team (“team”) submitted applications. From those applicants, the Board selected three members and a chairperson, and the nominations committee selected three members. The team members included Ann Cargill; David Crockett; Caroline Eastman; Joe Long; Cheryl Soehl; Janet Swigler, and Mike Paget, chairperson.

The Process

The LRP team included the following documents and input in their deliberations:

- Existing notes and reports from prior reviews and discussions
- Input from members who participated in a series of six input discussion sessions, and one individual interview
- Written input received from members
- Documents from the Unitarian Universalist Association
- Other writings (see Appendix “C” for references)

The LRP team received a document from the Board suggesting ten topics. The team agreed to consider all issues, grouping them into six topical areas:

- Leadership
- Growth
- Staffing
- Finance
- Buildings and grounds
- Membership

Each topical area was spearheaded by one of the team members. That team member developed draft reports that were shared with the full team for review and input. The chairperson merged all topical areas into the report document. This executive summary reviews the major issues and recommendations from the complete LRP Report.

Major Findings and Recommendations

Optimism

The team appreciated the candor, constructive thought, and guarded optimism prevalent during input sessions. There seemed to be a mature sense of willingness to work towards something larger than individual agendas.

Action

A frequent comment made across the input sessions was the sense that the UUFC does well at receiving input, but little comes of the input. It was the perception of the team that this issue may represent the growth struggles of moving from a pastoral to a mid-size congregation. Inherent in that transition is a need to go from individual to organizational decisions and actions. There was also some conjecture that the "dysfunction of poor organizational leadership and action" probably serves some purpose for selected members. That is, there may be some members who struggle to turn over authority to the organization due to a lack of trust in organizations, as well as recognition that some may feel a sense of having less personal control as the organization takes on more authority.

It will be very important that the Board determine a means to ensure that those designated as responsible for selected tasks complete any required work in a timely manner.

Trust

An over-riding recommendation of the team is that the UUFC strengthen its commitment to, and understanding of, organizational leadership. *There needs to be a clear line of authority, decision-making, and responsibility inherent in the structure and operations of the UUFC. Parallel to this recommendation is the understanding that leadership functions best with effective "followership". We need clear lines of input, decision-making, and action, and both the leadership and all members need to work within those lines.*

Future

A long-range plan is critical as any organization moves into its future. Without a LRP, the organization simply focuses on the issues of the day, while stumbling into a future. The better alternative is to find the balance between addressing the short-term issues, while implementing actions that will build the future that the UUFC wants. In this light, the team strongly recommends that any accepted recommendations include very clear tracking of progress, including identifying responsible parties, establishing timelines, and monitoring progress towards completion of the recommendations.

Linkage

Throughout the input and discussion process, repeatedly it came up that one topical area would be linked directly and indirectly to other topical areas. In writing these

recommendations, the linkages became very clear. A strong membership is made stronger with a full time minister, and the full time minister is in a better position to develop resources required to complete significant improvements on the buildings and grounds. Improved buildings and grounds are likely to result in increased membership, which, in turn, supports the full time minister.

Long Range Planning

The team recommends that long-range planning become part of the way of doing business at the UUFC. Specifically, it is recommended that a new long-range plan be developed every five years. Annual reviews and adjustments to a LRP are part of any effective operation. But the LRP must be in place to focus the energies of the church.

Enabling the Mission

Ultimately, the mission of the fellowship is not directly about buildings and grounds and staff and committees and procedures. The LRP recommends actions regarding resources and organizational structures that provide a place and a structure to support the mission of the UUFC.

A summary of recommendations follows.

Area	Goal	Short range 1-6 months	Medium Range 6-12 months	Long Range 1-5 years
Finance	F 1 Increase member giving	Build awareness Promote UUA giving guidelines	Beginning in 06-07, designate a Board member to chair the canvass to maintain attention to the canvass throughout the year. Pay UUA Fair share Produce Annual Report	Produce and distribute annual budget report, detailing activities and financial reports.
Finance	F 2 Ensure accurate and transparent tracking, recording, and reporting of all revenue and expenditures	Continue current efforts of reporting on an individual giving on an accurate and timely basis.	Prepare for a professional audit-style review of financial record keeping.	Conduct a professional audit-style review of financial record keeping.
Finance	F 3 Determine the monthly contributions necessary to support agreed upon long-range recommendations	Review cost of implementing LRP recommendations with the membership, including monthly income necessary to support those recommendations. Make final determination of LRP goals to be addressed based on membership's ability to meet expected financial obligations.	Begin collections of funds designated for specific goal areas (e.g., building funds, full staffing funds) to "bank" those funds for future expenditures. <i>This activity may be described as fund drives, e.g., a capitol funds drive, etc.</i>	

Area	Goal	Short range 1-6 months	Medium Range 6-12 months	Long Range 1-5 years
B&G	BG 1 Remain in the current location. Anticipate comprehensive renovations to the buildings and grounds.	NA	NA	NA
B&G	BG 2 Adopt Green Sanctuary principles	Appoint ad hoc Committee to research Green Sanctuary principles, including funding supports and design options.	Review recommendations for renovation for adherence to Green Sanctuary principles.	Review participation in Green Sanctuary program and recommend to Board whether or not to continue formal participation.
B&G	BG 3 Carry out appropriate renovations to meet congregational goals.	Send Requests for Proposals (RFPs) to selected architectural and/or general contracting firms.	Select firm for renovations and develop a staged plan for implementation. Start renovations.	Continue implement of renovations as identified in previous stage.
B&G	BG 4 Improve appearance of buildings and grounds.	Clarify procedures: process for repair and maintenance, standards for posting of paper and other temporary documents, kitchen organization and cleanup rules, dealing with clutter, etc.	Inform/train membership regarding building and grounds usage rules. Implement monitoring for compliance.	Continue improvement activities on an annual or semiannual schedule.

Area	Goal	Short range 1-6 months	Medium Range 6-12 months	Long Range 1-5 years
B&G	BG 5 Upgrade signage, including a UUFC marquee to inform passersby of upcoming events.	Solicit ideas and bids for updated exterior signage, including supporting lighting, Select desired package and implement.	<i>Note: In anticipation of comprehensive renovations, the intent here is to improve signage for the short term. More permanent and compatible signage would be part of the comprehensive renovation.</i>	
B&G	BG 6 Provide for an adequate heating, ventilation, and cooling (HVAC) system.	30 days: Solicit bids to provide for adequate HVAC in all areas of the buildings. 90 days: Select contractor and complete work.	<i>Note: In anticipation of comprehensive renovations, the intent here is to immediately providing for acceptable health, safety, and comfort levels throughout the building.</i>	This recommendation reflects an immediate and critical need. It is likely that eventual renovations would further upgrade and change the HVAC system, especially pending green design standards approval.
Membership	M 1 Use membership information more effectively.	Update membership information, including membership status and current contact information for directory.	Identify needs, wants, and assets that may be used for the good of the congregation. Analyze and report results.	Conduct yearly updates and reports. Use the information in ways that have benefit to the UUFC and members.
Membership	M 2 Update affiliation types in the by-laws.	Review and clarify membership categories.	Approve at annual meeting	Provide information to new, current, and potential members on an ongoing basis.

Area	Goal	Short range 1-6 months	Medium Range 6-12 months	Long Range 1-5 years
Membership	M 3 Define membership goals (i.e., what does the UUFC intend to provide for its members?).	Set short-term goals.	Define activities to support goals.	Review other aspects of the UUFC to determine if membership needs are being addressed
Membership	M 4 Provide a membership package to new and prospective members	Develop membership package	Adopt the membership package. Train individuals to greet, contact, and encourage new members in the use of the materials.	Evaluate and update the membership package on an ongoing basis.
Leadership	L 1 New operating procedures for Board of Trustees	Adopt new procedures (not requiring by-laws changes)	Revise by-laws	Identify and cultivate talent: Leadership development
Leadership	L 2 New operating procedures for Committees	Adopt new procedures (not requiring by-laws changes)	Revise by-laws	Leadership school participation Education
Leadership	L 3 Defined operating procedures for Program Groups	Adopt new procedures (not requiring by-laws changes)		Volunteer development and support Mediator training
Leadership	L 4 Develop concept of personal ministry.	Educate congregation about personal ministry.	Support and value expressions of personal ministry.	On an ongoing basis, provide recognition and support to the personal ministries of members.

Area	Goal	Short range 1-6 months	Medium Range 6-12 months	Long Range 1-5 years
Growth	G 1 Continue to emphasize expanding and improving religious education for children and youth.	Hire part-time Director of Religious Education (DRE).	Emphasize improved programming for children and youth.	Increase DRE position to fulltime, and expand the responsibilities to life span religious education.
Growth	G 2 Offer more religious education programs for adults.	Worship committee work with the minister to develop basic training courses on Unitarian Universalism.	Implement basic training courses on Unitarian Universalism.	Start a regular study course for adults.
Growth	G 3 Expand our outreach and visibility in the community.	Activate the Public Relations (PR) Committee. Use the PR committee to organize more community awareness and participation.	Develop a procedure for Board approval of a once-a-month special collection (above routine pledges) for an identified local need or charity. Begin outreach program to universities.	Evaluate the effect of the special collection. Publicize activities. Investigate faith based funding for prison ministry. Begin speakers' bureau.
Growth	G 4 Increase attendance	Adopt sign-in roster and make sure data is stored properly.	Increase attendance by 5% Advertise Sunday Service Personally contact newcomers Improve appearance of foyer Sign up newcomers for Unigram Follow up on people who leave	Increase attendance 5% a year Institute second Sunday service Increase size of sanctuary

Area	Goal	Short range 1-6 months	Medium Range 6-12 months	Long Range 1-5 years
Growth	G 5 Enhance communications.	Develop policies and procedures regarding publicity and information distribution, including the management and operation of the website.	Implement policies and procedures regarding publicity and information distribution, including the management and operation of the website.	
Staffing	S 1 Hire a full complement of staff.	Hire a part-time DRE Hire nursery staff. Define roles of all positions.	Begin process to hire a full-time minister.	Hire full-time minister Hire full-time life-span DRE Hire full-time Office Administrator Hire part-time bookkeeper
Staffing	S 2 Define job descriptions and evaluation guidelines for staff.	Assign Personnel Committee to review 2004 Staff Handbook position descriptions and evaluation procedures for staff.	Update Staff Handbook to include evaluation procedures. Implement procedures.	Update manual as needed.
Staffing	S 3 Provide compensation and benefits consistent with UUA standards.	Study appropriate salaries and benefits and decide on priorities.	Act on compensation and benefit priorities, moving incrementally toward long-range goal.	All staff members will be receiving fair compensation and benefits.
Staffing	S 4 Develop personal ministry of members.	Expand Membership Committee's role to include personal ministry.	Educate congregation about personal ministry as volunteers.	Hire a Shared Ministry Facilitator.

Appendix D

Buildings and Grounds Programming Notes

For

Requests for Proposals

List of Renovations
March 13, 2006

The purpose of this document is to serve as the basis for a Request for Proposals in the event that it is decided to move forward on major renovations of the current property.

1. Upgrades/replacement of HVAC system
2. Upgrade electrical system to code
3. Upgrade plumbing system to code
4. Additional off-street parking
 - a. Parking should meet city codes if at all possible
 - b. Fully accessible handicapped parking included
 - a. Use of porous material for paving
 - b. Covered protected drop-off entry area
5. Renovations of the sanctuary and associated seating area:
 - a. Upgrade or replacement of fixed seats, possibly with moveable (stackable?) chairs or pews
6. Integrate alcove with sanctuary
7. Increased seating capacity of at least 300
8. Sound insulation between the sanctuary and social hall
9. Replace folding curtain wall with solid wall
10. Appropriate level of accessible seating
11. Unified flooring
12. Avoid direct sunlight shining in eyes
13. Upgrade sound and lighting systems, including building in the capacity for multi-media presentations
14. Replacement of windows by more energy-efficient ones
15. Social Hall
 - a. Renovate stage area, including lowering the stage floor to approximately 14 inches high (two steps), and upgrading stage lighting and back and front curtains. Also, eliminate the exhaust fan opening on the rear wall of the stage.
 - b. Establish dedicated storage areas accessible to the social hall for folding tables, chairs, and other items.
 - c. Social hall furnishings: Replace existing wooden chairs with safer and more comfortable updated stacking chairs. Include rolling storage racks for stacking chairs.

- d. Update aesthetics of the social hall, including ceiling treatments, paint, and lighting.
- c. Redesign the library/office area adjacent to the stage to be used as an office, and to be available to support stage events via the door from that space to the stage.
- d. With the utility upgrades, provide sound and lighting management wiring taps at appropriate locations to support staged activities. It might be useful to provide these taps near the current folding wall, perhaps in a utility port on the (new) rear wall separating the social hall from the sanctuary.

2. Kitchen

- a. Renovate kitchen to current standards
- b. Replace existing cabinetry and countertops
- c. Replace existing appliances with appropriate commercial grade equipment
- d. Install required venting and safety equipment
- e. Consider removal of existing block wall (behind refrigerator) to open up floor area.
- f. Add a walk-in pantry for kitchen storage. This pantry may require a small addition to the rear of the building, or a re-configuring of existing (dedicated) kitchen space.

3. Bathrooms

- a. Provide hot water in bathrooms
- b. Expand bathroom capacity to handle maximum attendance at events of approximately 200
- c. Apply potty parity principles to equalize waiting time rather than units between the genders
- d. Provide truly accessible facilities, possibly through a family/handicapped room
- e. Move the bathrooms from the wall adjacent to the social hall to the areas now occupied by the DRE and administrator's offices. This would help sound insulate the bathrooms from social hall activities.
- f. Children's bathroom in RE wing

4. RE Wing

- a. Ensure long-term structural stability
- b. Improve half-basement storage area
- c. Expansion to two stories of heated space either by renovation of half-basement or addition of another level
- d. Demolish the rear part of the RE wing (often referred to as the "Fort Jackson" addition), and replace it with a new two-story addition.

- 5. The small octagonal library building is interesting, but is out of character with the main building. Relocate this building to the rear corner of the property, and shield it with landscaping to minimize the discrepant architectural styles. If relocation is not feasible, consider demolishing this structure.

6. Improved storage capacity

- a. Outside storage for lawnmower and hazardous materials
- b. Interior remodeling

7. Landscaping

- a. Landscaping materials could be identified that are appropriate for a green re-design of the property. The benefits of any such re-design would be direct to the users of the property, and indirect, as an educational statement, to the community at large.
 - b. Possible relocation/modification of playground
 - c. Benches/seating areas
 - d. Improved outside lighting
 - e. Courtyard
 - i. If the octagonal building were removed (see above), this would open up a potential courtyard area. The courtyard could be developed to include the memorial garden, as well as comfortable outside spaces for social activities and meetings.
 - f. Memorial garden: Members of the UUFC do not currently have the option of a "final resting space", or a space for memorializing deceased members. A memorial garden could provide that permanent location, including locations for plaques, and for the burial and/or dispersion of cremains.
 - g. Install aesthetically appropriate signage, including a marquis, for the UUFC. Such (electronic) signage could serve informational purposes for passersby, including informing them of upcoming events, sermon topics, and the Wayside Pulpit comments. Additional signage should direct members and visitors to the functions of the property, including parking, entryways, accessible areas, etc.
8. Sustainable construction and landscaping
- a. Use of LEED (Leadership in Energy and Environmental Design) standards
 - b. Use of native plants in landscaping
9. Accessible Facilities (any not mentioned earlier). Renovation plans should be submitted with projected costs and timelines for the complete renovation. Plans should also include proposals for two phases of renovation:
- a. Phase one would include the main building, including the sanctuary, social hall, kitchen, front hallway/office area of the religious education wing, and an initial upgrading of existing landscaping (to be compatible with and promote improvements to the building).
 - b. Phase two would include demolition and reconstruction of the (new) two-story religious education wing, and remaining landscaping and grounds renovations, including parking, the courtyard, memorial garden, and all remaining signage.