

**THE UNITARIAN UNIVERSALIST FELLOWSHIP
OF CENTRE COUNTY (UUFCC)**

LONG RANGE PLAN, 2006 – 2010

Endorsed by the congregation on

May 21, 2006

UUFCC PRIORITY GOALS

This Long Range Plan (LRP) represents the participation and input of many friends and members of the UUFCC. Specific details about the LRP for Programs, Administration, and Organizational Structure can be found in the body and appendices of this document. This document should be considered a guide, or starting point, from which to proceed in shaping the next five years at the UUFCC, not as the final authority in the execution of our plan. On this page, the Long Range Planning committee has identified several overarching goals to guide the leadership of the UUFCC during the next five years (2006-2010).

1. Improve financial management, which is essential to achieving the major goals identified on this page and many other goals identified throughout the LRP. Financial success will depend on serving the needs of our community, an organized financial team, and effective year-round stewardship.
2. Restructure the current UUFCC organizational and governance structure to better meet the needs of a growing congregation. The revised structure should include a Board of Directors, a Program Council, and an Administrative Council, and should be organized to facilitate communication among committees and members, distribute and minimize the burden of leadership positions, and encourage community growth.
3. Develop a Lifespan Religious Education (LRE) program that encourages wide participation by current friends and members and provides an opportunity for those not familiar with the UUFCC to discover our spiritual home. A successful LRE program will increase enrollment and participation in our traditional RE program on Sunday and expand the adult RE program to provide a diversity of programming for all of our current members and friends and for future members.
4. Establish the position of Volunteer Coordinator to facilitate: i) membership involvement in a growing community, ii) effective communication among committees and a growing staff, iii) participation in JPD and UUA activities, and iv) outreach to the Centre Region community.
5. Provide adequate space for the members and programs of the UUFCC community. As our annual budget improves as a result of anticipated membership growth and a corresponding increase in financial commitment within the next five years, building expansion will be a realistic consideration.

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EXECUTIVE SUMMARY

The Unitarian Universalist Fellowship of Centre County (UUFCC) was founded in 1950. From an original membership of 14, we currently include 268 members. We have a beautiful Fellowship Hall and campus, and many UUFCC friends and members support and participate in community-organized programs and activities. A full time Director of Religious Education (DLRE) was hired in 2005 and joins our full time minister in serving and leading our community. The previous Long Range Plan (LRP) was developed in 1997/98, so an updated 5-yr LRP was overdue. The process of developing the LRP has been generally well-received, with active participation by many members. A short-phrased mission statement was developed through several all-congregation exercises. Various planning clusters, representing all current committees, developed individual LRP's through workshops for each planning cluster. Budget projections relied heavily on historical trends based on actual UUFCC data from 1992 to 2006.

The current Covenant, Vision, and Mission statements were re-affirmed. The following short-phrased mission statement was developed as a result of this long range planning process, "*A spiritual community for celebrating religious freedom, religious tolerance, and reason.*"

This LRP specifically addresses the UUFCC Programs, Administration, and Organizational Structure.

Our Programs represent activities important to our community. Religious Education plans to create greater congregational ownership in the lifespan education program. Community Life & Fellowship Relations plans to increase participation of all friends and members in our community. Social Action & Outreach will improve the transparency of the selection process for social action projects to encourage participation by the whole Fellowship. Sunday Services & Music desire to develop services that continue to meet the individual and collective needs of the community, expand an already exciting music program, and improve the audio system to better accommodate everyone. Enhancing the Music Program will require increasing the Music Director position from ¼ to ½ time. Successful implementation of Programs' LRP should encourage membership growth and retention.

Administration includes Personnel, Property, and Finance. We recently hired a full time DLRE. To encourage retention of current personnel, we hope to provide salaries at UUA Fair Compensation guidelines. Additional personnel will be required to meet the needs of a growing Fellowship. In addition to maintaining our current building and grounds, building expansion has long been identified as a priority to address space issues. Fiscal responsibility will depend on sound financial planning, so a permanent Finance Committee will be necessary. Currently we are growing at a net rate of four members per year, and a 4% mean annual increase in pledges is expected for the next five years. Based on the current growth in membership / pledges, deficit spending is projected for the next three years. If proposed plans are successfully implemented, we might expect to have a net positive income within two years. This would require a net annual membership growth of 10 members.

The current UUFCC governance structure is consistent with a "Pastoral" size (50 – 150 worship attendance) congregation. Based on our current worship attendance, we are approaching a "Program" size (150 – 300) congregation, and should re-organize our governance structure to better meet the needs of our community. We should replace our current Board with a Board of Directors, a Program Council, and an Administrative Council. A Volunteer Coordinator and Stewardship Committee will be essential to successful growth and financial responsibility.

INTRODUCTION

Brief History

The Unitarian Universalist Fellowship of Centre County (originally known as the Unitarian Fellowship of Centre County) was formed in the spring of 1950. The original group included 14 members. Services were held in members' homes for a few months before gatherings began at the Friends' Meeting House. By October, 1951, meetings were conducted on a bi-weekly basis. Within two years, weekly meetings began. Sunday school was initially held jointly with the Friends. In time, the Unitarians decided to meet at the Odd Fellows Hall, and have a separate Sunday school under the directorship of Mary Oliver. Membership quickly doubled.

Groundbreaking for the Unitarian Chapel was held on May 12, 1959. The building was occupied by the next spring. It cost about \$35,000. With growth of the small Fellowship, there was need for a larger space for religious education (RE). A second building on Glenn Road was constructed for the RE program, in 1965. In November of 1970, the Fellowship voted to call its first minister. In August, 1991, we moved into our current building, which is situated on about five acres. In 2000, Mark Hayes answered our call to be our current settled Minister. Lois Durran was the first Music Director, augmenting an emphasis on aesthetics long favored by the Fellowship. In 2002, Amanda Sillicker became our current Music Director. In 2005, Jean Wiant became our first full time Director of Lifespan Religious Education.

Currently, we have 268 members in the Fellowship and 70 children enrolled in the RE program.

Our Legacy

Our current building is situated on an attractive campus, with a beautiful sanctuary and a wonderful view of Tussey Mountain from inside and outside the building and a wonderful view of Bald Eagle Mountain from outside. The RE classrooms are sometimes crowded with children, which has been discussed in the context of building expansion for several years. We also need additional office and storage space, and a bigger social room (see Building Expansion Committee Report, Appendix F).

Fellowship activities continue to grow. Under the umbrella of the Social Action Committee, several task forces have been set up, including task forces for the environment, Habitat for Humanity, and for children. Members of the Fellowship founded a highly successful program called A Book for Every Child, an annual December event in which several thousand new children's books are collected for distribution locally for those in most need. Our programs are diverse, providing opportunities for friends and members to participate in many community activities, including such activities as Small Group Ministry, All-Congregation Retreat, Dinner Club, TGIF, Wonderful Soulful Wednesday, 4th Wednesday Game Night, and many others. An integral part of our history is the diversity of activities undertaken both by individuals from the Fellowship as well as those Task Forces with a mandate from the Fellowship. Through these efforts we have joined with other individuals and other faith communities in the State College area as a way of letting our presence be known.

Long Range Planning Process

The current LRP Committee includes: Martha Butler, Mark Hayes, Bev Henshaw, Peter Jurs, Herman Richey, John Schmidt, and Jean Wiant.

The LRP Committee was charged by the UUFCC Board to develop an updated LRP report. The most recent comprehensive LRP report was developed in 1997-98. A short-term goal for the LRP Committee was to produce a draft LRP report that would accompany a Joseph Priestly District (JPD) Chalice Lighter Grant, due February 1, 2006. A final LRP report should be completed and presented at the congregational annual meeting in May 2006. A vision for this committee is to establish a repeatable process for maintenance and update of the LRP, including regular reporting of progress in carrying out the action plans.

The LRP process was initiated through an all-congregation exercise in developing a short-phrased mission statement (described below). The LRP Committee organized all existing committees into planning clusters for the purpose of developing individual LRP reports from each cluster. The organization of these clusters was based on the current UUFCC organizational structure, suggestions in the Alban Institute report (Appendix I), and discussion among the LRP Committee members. The individual LRP reports were developed in workshops attended by committee members representing each cluster. These LRP reports were summarized in the main text of this LRP report and included in their entirety as appendices.

Comments on a draft LRP were solicited from the entire congregation through electronic and hard copy distribution of the document and an all-congregation workshop. The Board provided input and reviewed the draft LRP prior to a congregational vote in May 2006.

Mission, Vision, and Covenant

The current UUFCC Covenant, Vision, and Mission Statements, endorsed by the congregation in November 2000, are:

Our Covenant: We, the members and friends of the Unitarian Universalist Fellowship of Centre County, covenant to: come together in a spirit of trust and respect; to love, listen, cry, and laugh; shaping a mutually supportive community that nurtures our minds and spirits, and celebrates the worth and dignity of us all. We commit ourselves to do this with caring, compassion, and understanding through open, honest communication.

The Vision of the Unitarian Universalist Fellowship of Centre County is to be a place where individuals feel safe, supported, empowered, challenged, and energized to share their talents, live their values, and be part of a beloved community.

The Mission of the Unitarian Universalist Fellowship of Centre County is to: articulate and promote liberal religion, provide a spiritual home for persons who seek to know the truth for themselves, and inspire and empower individuals to live out their values and principles in the community, both within and beyond our walls.

Two congregational gatherings, the annual Board retreat, and a ballot provided in the monthly newsletter and distributed at Sunday service were used to solicit input on congregational core values and to develop a short-phrased mission statement. Developing a short-phrased, or “bumper sticker”, mission statement was suggested in the Alban Institute report (Appendix I). The merit of a short-phrased mission statement is that it can be easily recalled, providing an identity statement with which friends and members can associate.

During this process there were many comments from friends and members indicating that the current Covenant, Vision, and Mission Statements still represented who we are. A list of congregational core values was generated and supported the consensus that these statements are still representative. One idea implied in these statements, but not explicitly stated, is that we are a Welcoming community. This was frequently mentioned during this process, but it was generally agreed that the current statements imply this important character of our community.

Several variants of a short-phrased mission statement were included on the final ballot available to all members and friends of the UUFCC. The short-phrased mission statement that received the most votes was:

A spiritual community for celebrating religious freedom, religious tolerance, and reason.

The LRP considered the merits of formalizing this short-phrased mission statement with a congregational vote, but decided in favor of simply presenting this statement as the outcome of the process described here. The exercise in developing this statement re-affirmed the relevancy of our current Covenant, Vision, and Mission Statements, and this short-phrased mission statement is simply a shorter version of our current Mission Statement.

PROGRAM PLAN

The program plan represents those congregational activities important to the friends and members of the UUFCC. By our actions we express who we are. A vision of our desired program is represented here. Detailed goals, and plans to achieve those goals, are presented in the corresponding appendices.

Religious Education

1. Create greater congregational ownership in the lifespan religious education program through
 - a. Increased financial resources for RE programs.
 - b. Volunteer participation by a greater percentage of the congregation.
 - c. Leadership development for RE lay leaders.
 - d. An RE archive to record the program's history.
2. Ensure that RE programs are afforded appropriately sized, adequately furnished, and aesthetically pleasing space in the current building and in any future expansion projects.
3. Maintain the ongoing campaign to promote the lifespan religious education program to the Fellowship, Centre Region, and Penn State University communities.

Community Life & Fellowship Relations

1. Encourage full participation of all friends and members in a community in which we carry out the vision of the UUFCC.
2. Develop successful membership coordination that engages friends and members to participate in and feel a part of our community in ways that fulfill their needs.

Social Action & Outreach

1. Develop a selection process for social action projects that is transparent to and includes the whole Fellowship.
2. Develop and foster continuity and coordination in social action activities that encourage participation from prospective volunteers, document the current infrastructure, and allow the Fellowship to respond quickly to time-sensitive topics.

Services & Music

1. Continue to provide Sunday services that are responsive to the individual and collective needs of the Fellowship and are consistent with the UUFCC Mission, Vision, and Covenant.
2. Develop an expanded and exciting music program.
3. Install an improved audio system in the sanctuary, lobby, social room, and religious education wing, so that services can be adequately heard anywhere in the building.

ADMINISTRATIVE PLAN

The administrative plan documents the means by which our Fellowship hopes to carry out the program plan. An overview of the administrative plan is presented here. Additional details are provided in the corresponding appendices.

Personnel

1. Provide personnel support in proportion to their importance to our community. A full time DLRE is a recent addition to our growing staff. Increasing the Music Director position (from ¼ to ½ time) will be important during the next five years.
2. Consistent with needs identified under Finance, provide a professional accountant who will manage the increasingly complex finances associated with our growing community.
3. Provide a professional service or staff member to maintain a clean building that will be attractive to fellowship friends, members, visitors, and potential renters.
4. A single full-time professional Minister should be sufficient for the next five years, but the ministry would be enhanced by the addition of a student / intern minister during that period. Addition of a second minister (assistant or associate) may be considered in the longer term depending on actual congregational growth.
5. Personnel growth within the next five years should include a Volunteer Coordinator and perhaps longer term (5 -10 yr) a sexton.

Property

1. Address the issue of building expansion in the next five years. Inadequate space for RE, social room, coat room and lobby have all been identified as issues to resolve. Other items that need to be resolved include shortage of storage space, poor acoustics in the social room and sanctuary, and a cluttered hallway. The April 2004, UUFCC Building Expansion Task Force Report indicated, "... three principle space needs and desires that could be served by an expansion of the present facility. They are: 1) Religious Education, 2) Social Room, and 3) Special functions, including offices, music facilities, foyer, bathrooms, and storage areas."
2. Maintain the interior and exterior of the facilities, providing an aesthetic appearance that is important for the personal enrichment of our community. A goal set forth in the Goodwin Report, before the current building was constructed, was that "We desire a beautiful building, inside and out that takes advantage of its site and its views." The 2004 UUFCC survey indicated that the three highest priorities for expenditure were (a 3-way tie): i) Annually set aside money in our Emergency Building Repair Fund, ii) Improve our audio system for the spoken word in the sanctuary, and iii) Start a capital campaign for expanding our facilities.
3. Improve the sanctuary aesthetics by regularly rotating the displays.

Finance

1. Develop and maintain finances adequate to support Fellowship activities.
2. Address issues that will be particularly relevant during the next five years.
 - a. Develop a Finance Committee to adequately meet the current and increasing demands of a growing community.
 - b. Develop and maintain a year-round Stewardship Committee
 - c. Provide personnel salaries that fully meet UUA Fair Compensation guidelines
 - d. Finance a building addition.

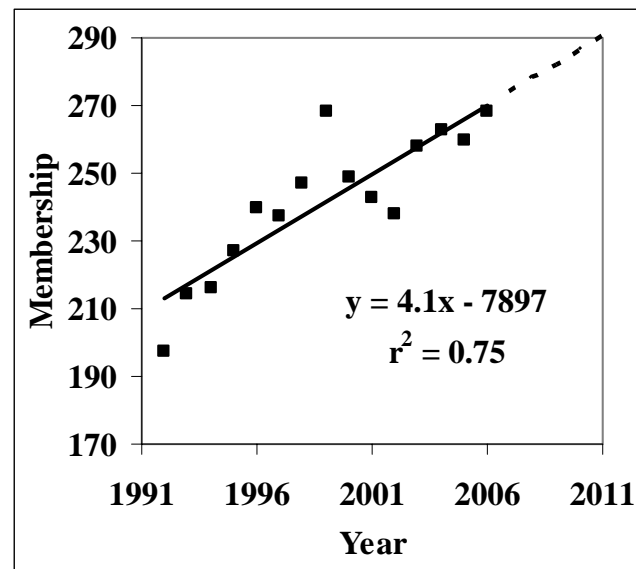
Membership and financial information are presented here in a historical and forecasting context. Membership information provides a context for the financial forecasting.

Membership Summary

Since 1992, membership at the UUFCC has increased at an average rate of 4 members per year. This increase has sometimes occurred irregularly; however, a linear increase depicts fairly well membership growth during this time period (see figure). Based on a linear extrapolation, membership is expected to be 290 by 2011.

Selecting a time frame from which to linearly extrapolate membership growth is problematic. If the selected time window is shifted back by eight years, a linear extrapolation indicates 7.3 annual membership growth, which is not

representative of membership growth (1.6) during the most recent eight years (1999 – 2006). The most recent eight years include a sharp decline observed between 1999 and 2002. Selecting years 1992 to 2006 from which to extrapolate for the next five years provided a compromise between the faster growth prior to 1992 and the erratic changes in membership during the most recent eight years.



During the previous four years (since 2001), our records indicate that there have been 19 new members added to the fellowship each year. This suggests that while we add 19 new members annually, we also lose 15 current members. Objective information is unavailable to suggest why we might be losing 15 members per year; however, membership growth could potentially increase at a much greater rate than currently observed. One of the unique challenges, and perhaps strengths, is the transient members in this community who are employed by a large university and high-tech industry, major employers in Center County. The Alban Institute report (Appendix I) suggests that membership retention could be improved with some organizational re-structuring and better coordination through a Volunteer Coordinator (discussed below).

Membership

The following table provides projections during the next five years for: membership, Sunday attendance, children enrolled in religious education, and new members. Assumptions for projections are included below the table.

UUA Reporting year	2002	2003	2004	2005						
Description	Fiscal year	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Members		258	263	260	268	Projections >				
Friends		Not available				274	278	282	286	290
Sunday attendance		159	126	138	147	148	150	152	155	157
Children enrolled in RE		90	118	85	68	93	95	96	97	99
RE Sunday attendance		39	33	34	20	33	38	39	41	42
New members		19	23	20	13	19	19	19	19	19
		-----				%				
Sunday attendance		62	48	53	55	54	54	54	54	54
Children enrolled in RE		35	45	33	25	34	34	34	34	34
RE Sunday attendance		43	28	40	29	35	40	41	42	43

Data from reporting year correspond to the following fiscal year.

Assumptions for projections:

Members: Based on historical record for period between 1992 and 2006 (Membership = 4.1 x Year - 7897).

Sunday attendance: Average percentage of members attending Sunday service between 02/03 and 05/06, 54%.

Children enrolled in RE: Average proportion of children relative to membership between 02/03 and 05/06, 34%.

RE Sunday attendance: Average proportion of children attending RE between 02/03 and 05/06, plus a 5% increase in 07/08 (a result of hiring DLRE) and then a 1% increase each year.

New members: Average number of new members between 02/03 and 05/06.

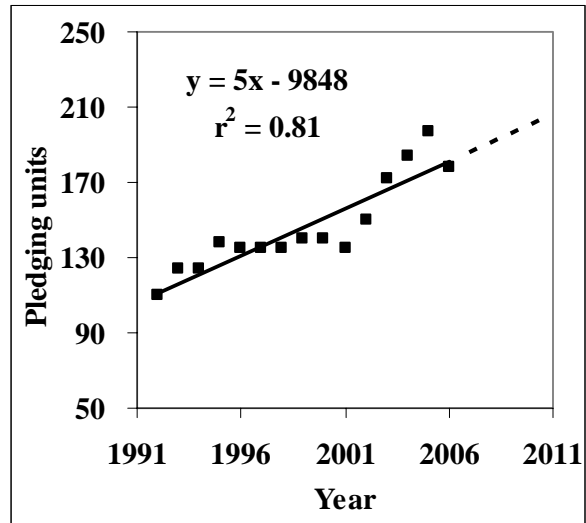
Current long term members indicate that UUFCC membership had significantly increased when we hired a full time minister and also when we moved into our current building. This anecdotal evidence suggests that having hired a full time DLRE we should expect another increase in membership and an increase in RE attendance. A full time DLRE anchors the personnel commitment and adds professionalism to our RE program, which will be attractive to current and new friends and members of UUFCC and encourage their long term commitment to our community.

Another indicator anticipating membership growth is that the congregation has recognized the need to reorganize our governance structure and will have committed to this change with the endorsement of this five-year LRP. Our membership is currently at 268 and our average worship attendance is approaching 150, the threshold between a “Pastoral” (50 – 150) and “Program” (150 – 300) size congregation (<http://www.uua.org/cde/education/SizeTransitions.pdf>). Currently, we are still organized as a “Pastoral” congregation (see discussion below in Organizational Plan). Six years ago we had reached the same membership level, and have since maintained a relatively similar congregational size. The “Pastoral” paradigm has probably contributed to this plateau in membership, as dissatisfaction resulting from Board and committee (dis)organization and (dis)functioning (see Alban Institute report, Appendix I) may have contributed to members leaving the fellowship. As we reorganize our governance structure, we will lay the foundation for, and catalyze, future growth.

Budget Summary

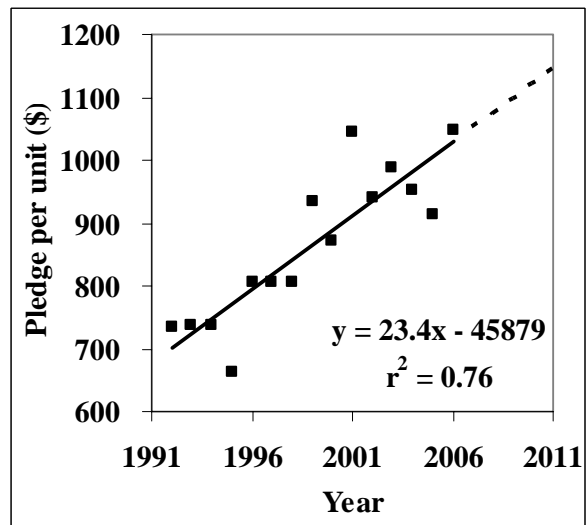
Pledging units represent the number of pledges received during the annual pledge drive. Pledging units increased at a slightly greater rate than membership growth between 1992 and 2006, increasing five pledging units annually compared to a four-member annual increase. Assuming this linear relationship persists for the next five years, pledging units will increase to 207 by 2011.

This represents a mean annual increase in pledging units of 2.6% during the next five years.

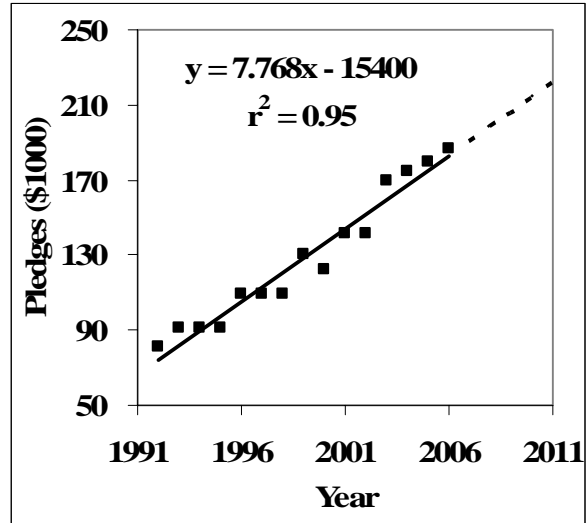


An increase in the pledge per unit (mean pledge) between 1992 and 2006 was slightly more irregular than either membership growth or pledging unit growth; however, a linear relationship appears adequate for extrapolating pledge per unit for the next five years. We should expect pledge per unit to increase to \$1146 in 2011 from the current amount of \$1029.

This increase represents a mean annual increase of 2.2% for pledge per unit.



Annual pledges are depicted in the figure on the right and have increased linearly between 1992 and 2006. This represents pledges and not pledge receipts (in hand). Pledge receipts have averaged 95% of pledges during the previous two fiscal years (03/04 -04/05) and averaged 99% of pledges during the previous four fiscal years (01/02 – 04/05). This is addressed in more detail below in the context of the entire budget.



Based on the relationship depicted here, pledges will increase to \$221,751 by 2011. This represents a mean annual 4% increase in pledges during the next five years.

Members, pledges, and pledging units are summarized in the following table using the same data presented in the previous figures.

UUA Reporting year	2002	2003	2004	2005						
Description	Fiscal year	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
						Projections >				
Members		258	263	260	268	274	278	282	286	290
Pledging units		172	184	197	178	187	192	197	202	207
Pledging units / members		0.67	0.70	0.76	0.66	0.68	0.69	0.70	0.70	0.71
Pledges		170,000	175,000	180,000	186,500	190,679	198,447	206,215	213,983	221,751

Data from reporting year correspond to the following fiscal year.

Assumptions for projections:

Members: Based on historical record for period between 1992 and 2006 (Membership = 4.1 x Year - 7897).

Pledging units: Based on historical record for period between 1992 and 2006 (Pledging units = 5.0 x Year - 9848).

Pledging units / members: Proportion of pledging units to actual members.

Pledges: Based on historical record for period between 1992 and 2006 (Pledges = 7768 x Year - 15399897).

The table on the following page includes historical financial statements from the previous four years, the current year's estimated budget, and budget projections for the next five years. Assumptions used to develop the budget projections are included following the table.

Fiscal year	< Historical financial statements				Current	Projections >				
	2001/02	2002/03	2003/04	2004/05	Estimate 2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
INCOME										
4200 · Plate Collections	4,907	5,184	5,009	5,229	5,499	5,359	5,438	5,517	5,597	5,676
4300 · Pledge Receipts (in-hand)	160,133	157,717	165,804	171,251	194,074	188,772	196,462	204,153	211,843	219,534
4400 · Non-Pledge Receipts	5,699	5,444	6,497	3,275	3,404	5,229	5,229	5,229	5,229	5,229
4800 · Special Projects	12,329	13,162	13,228	12,876	12,000	12,899	12,899	12,899	12,899	12,899
4900 · Additional Income	7,162	10,035	8,386	8,212	9,480	8,449	8,449	8,449	8,449	8,449
4910 · Bequest					10,000					
Total 4000 · INCOME	190,230	191,542	198,923	200,843	234,456	220,708	228,478	236,247	244,017	251,786
EXPENSE										
5100 · Committees	8,507	6,570	7,208	5,026	11,535	6,828	6,828	6,828	6,828	6,828
5200 · RE & Youth	2,660	1,794	3,148	6,712	4,800	3,579	3,579	3,579	3,579	3,579
5300 · Contributions	10,860	10,800	13,018	17,940	19,028	19,218	19,410	19,605	19,801	19,999
5400 · Facilities (includes mortgage) ^a	39,790	38,152	42,660	45,141	40,733	41,229	41,740	18,074	18,617	19,175
5500 · Office	10,781	10,706	10,718	12,838	13,923	14,062	14,203	14,345	14,488	14,633
Total 5000 · (other expense)	72,598	68,021	76,753	87,657	90,019	84,916	85,760	62,431	63,313	64,214
Personnel										
6010 · Custodian	4,737	5,710	5,881	6,062	6,202	6,388	6,580	6,777	6,981	7,190
6020 · Director of RE	25,357	29,941	10,478	-	43,032	44,323	45,653	47,022	48,433	49,886
6030 · Financial Secretary	1,955	2,691	2,772	2,859	2,994	3,084	3,177	3,272	3,370	3,471
6040 · RE Administrator			4,462	-	-	-	-	-	-	-
6200 · Minister	62,682	66,395	68,049	69,718	70,474	72,588	74,766	77,009	79,319	81,699
6400 · Music Director	4,306	7,097	7,313	8,593	10,503	10,818	11,143	11,477	11,822	12,176
6420 · Office Administrator	17,327	15,620	18,696	19,213	19,761	20,354	20,965	21,594	22,242	22,909
6900 · Other Personnel Expense	-	-	965	1,256	-	-	-	-	-	-
7000 · Childcare	2,174	2,049	2,100	2,080	1,950	2,043	2,043	2,043	2,043	2,043
Total 6000+7000 · Personnel	118,539	129,502	120,716	109,781	154,917	159,599	164,326	169,194	174,209	179,374
Total 5000+6000+7000 · EXPENSE	191,137	197,523	197,469	197,438	244,936	244,515	250,086	231,625	237,521	243,588
Net Income	(907)	(5,981)	1,454	3,405	(10,480)	(23,807)	(21,608)	4,622	6,495	8,199
Cumulative balance					(10,480)	(34,287)	(55,895)	(51,273)	(44,778)	(36,579)
^a Debt on current mortgage is retired in 2007/08 (see next line)										
5420 · Debt Service (Mortgage)	25,134	24,243	24,193	24,193	24,192	24,192	24,192	-	-	-
Facilities (less mortgage)	14,657	13,908	18,467	20,948	16,541	17,037	17,548	18,074	18,617	19,175
Pledges	141,000	170,000	175,000	180,000	186,500	190,679	198,447	206,215	213,983	221,751
Proportion of pledge in-hand	113.6%	92.8%	94.7%	95.1%	104.1%	99.0%	99.0%	99.0%	99.0%	99.0%

Budget Projections (06/07 – 10/11) Assumptions

<u>Line Item</u>	<u>Assumption</u>
1. Pledges:	aforementioned extrapolation of historical trend between 1992 and 2006.
2. Plate collection:	linear extrapolation of 2001/02 to 2004/05 trend, Plate collection = $79.15 * (\text{year as } 01, 02, \text{ etc...}) + 4805$
3. Pledge receipts:	99% of pledges (mean from previous 4 years)
4. Non-pledge receipts:	mean from previous 4 years
5. Special projects:	mean from previous 4 years
6. Additional income:	mean from previous 4 years
7. Committees:	mean from previous 4 years
8. RE & Youth:	mean from previous 4 years
9. Facilities:	mortgage plus 3% annual increase in non-mortgage facility expenses; mortgage expires in 2007/08
10. Office:	1% annual increase
11. Custodian:	3% annual increase
12. Director of LRE:	3% annual increase
13. Financial Secretary:	3% annual increase
14. Minister:	3% annual increase
15. Music Director:	3% annual increase
16. Office Administrator:	3% annual increase
17. Childcare:	mean from previous 4 years

In the current year (2005/06), the UUFCC has proposed a negative net income of \$10,480, which we plan to offset in the current year in one of two ways: i) drawing monies from our savings, and / or ii) soliciting donations through our Pacesetters campaign. The Pacesetters campaign was specifically developed to offset the additional expenses associated with hiring a full time DLRE. The Pacesetter income is included in Pledge receipts, which artificially inflates Pledge receipts in the current year (05/06). While this approach will be adequate in the current year, increasing expenses during the next few years will only be met with additional income. Increasing pledges and pledge receipts (without the Pacesetters) will be critical to managing a balanced budget during the next few years. Emphasis should be placed in coordinating an organized Stewardship campaign. Anticipated pledge receipts were based on 99% of pledges (mean from previous four years), which is probably unrealistically high. However, the proportion of members pledging has ranged between 0.66 and 0.76 during the previous four years. Effective Stewardship should result in greater pledging units, so pledge receipts projections are probably reasonable. Additional financial support will be sought through an application to the Joseph Priestly District (JPD) for a Chalice Lighter Grant. The subsequent discussion addresses the UUFCC financial needs and outlook.

The UUFCC congregation hired a full time DLRE in 2005/06 with the realization of a very tight budget. A bequest and the Pacesetters campaign are being used to partially offset this additional expense, and a Chalice Lighter Grant application will be submitted (August 1, 2006) to the Joseph Priestly District to help with this transition to full time DLRE. If the Chalice Lighter Grant is awarded, the additional income will alleviate some of the budget pressure anticipated in

2006/07 and 2007/08. However, the proposed budget anticipates receipt of 99% of pledges, an optimistic outlook, and salary increases that do not keep pace with the UUA Fair Compensation Guidelines. To meet these additional expenses, the UUFCC is planning for additional membership growth. Plans to realize additional income to meet forecasted expenses are described below.

1. A full time DLRE will greatly enhance our religious education program, and we believe this will help retain and grow membership. The UUFCC annual membership growth is currently 4 members (5 pledging units), while we have averaged about 19 new members per year. Between 1999 and 2002, there was a distinct decrease in membership, coinciding with a time when we were without a DRE. We anticipate a “recovery” in membership growth that will probably exceed the average annual growth used in the projected budget. As evidence of this recovery, the DLRE has already been working with the Membership Committee in reaching out to members who have left in recent years. Several of these members have returned already, and the DLRE expects to continue working with the Membership Committee. The excitement generated with the new DLRE should encourage members to pledge greater financial commitments.
2. Implementation of a year-round Stewardship campaign (compared to our current once-a-year campaign) will likely increase pledges, pledge per unit, and pledge receipts. While we may have optimistically projected pledge receipts (99%) in the projected budget, current trends in pledges and pledge per unit were linearly extrapolated in the projected budget. The Stewardship campaign should result in an increase in pledges greater than currently projected. A newly formed Stewardship Committee includes members who have recently attended a JPD-sponsored workshop on stewardship.
3. Establish the position of Volunteer Coordinator. This will improve membership participation in community activities, which should improve membership retention and membership growth because people will be more vested in the community. Currently, we do not have this position; however, a Volunteer Coordinator (initially as an unpaid position) has been identified and this activity will be implemented by fiscal year 2006/07.

With these already implemented changes, we are probably realistic in anticipating additional membership growth (compared to the current projection), which corresponds to additional pledging units and pledge income.

Alternate Budget 1:

If we assume an annual increase in pledging units of 7, instead of the current annual increase of 5, and all other assumptions remain the same as previously described, the following table summarizes alternate projected budgets (Alternate 1).

This projected budget reduces net loss in 2006/07 to \$15,611 and to \$9,270 in 2007/08. After the current mortgage is retired in 2007/08, net income in 2008/09 is projected at \$21,427. With the net positive income in 2008/09, we would be able to begin to realize the appropriate increases in personnel salaries to match UUA Fair Compensation guidelines and consider increasing the Music Director position to ½ time.

Assume membership and pledge units increase by 7 per year instead of the current 5 pledge unit increase.
Actual budgets from 2001/02 through 2004/05, proposed budget for 2005/06, and projected budgets for the next five years.

Fiscal year	< Historical financial statements				Current	Projections >				
	2001/02	2002/03	2003/04	2004/05	Estimate 2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
INCOME										
4300 · Pledge Receipts (in-hand)	160,133	157,717	165,804	171,251	194,074	196,968	208,801	220,958	233,438	246,243
Total 4000 · INCOME	190,230	191,542	198,923	200,843	234,456	228,905	240,816	253,052	265,612	278,496
EXPENSE										
Total 5000+6000+7000 · EXPENSE	191,137	197,523	197,469	197,438	244,936	244,515	250,086	231,625	237,521	243,588
Net Income	(907)	(5,981)	1,454	3,405	(10,480)	(15,611)	(9,270)	21,427	28,091	34,908
Cumulative balance					(10,480)	(26,090)	(35,360)	(13,933)	14,158	49,066

Alternate Budget 2:

Another budget scenario can be projected if we assume slightly more aggressive membership and pledging unit growth. If an annual membership growth of 10 can be achieved with a corresponding annual increase in pledging units, compared to the current 5, and all other assumptions remain the same, we could anticipate a budget that looks quite a bit more positive.

Based on the following projected budget (Alternate 2), the cumulative balance in 2007/08 would be -\$25,706. A successful Chalice Lighter Grant would probably accommodate this budget shortfall, and we would be in a better financial position to match UUA Fair Compensation guidelines for personnel salaries. By 2008/09, our financial position would be much improved with the retirement of our current mortgage, and we would emphasize the importance of any salary adjustments (as a result of the preceding lean years). Then we would be in an improved financial position to begin a capital campaign for a building expansion.

Assume membership and pledge units increase by 10 per year instead of the current 5 pledge unit increase.
Actual budgets from 2001/02 through 2004/05, proposed budget for 2005/06, and projected budgets for the next five years.

Fiscal year	< Historical financial statements				Current	Projections >				
	2001/02	2002/03	2003/04	2004/05	Estimate 2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
INCOME										
4300 · Pledge Receipts (in-hand)	160,133	157,717	165,804	171,251	194,074	200,095	215,193	230,754	246,778	263,265
Total 4000 · INCOME	190,230	191,542	198,923	200,843	234,456	232,031	247,208	262,848	278,951	295,518
EXPENSE										
Total 6000+7000 · Personnel	118,539	129,502	120,716	109,781	154,917	159,599	164,326	169,194	174,209	179,374
Total 5000+6000+7000 · EXPENSE	191,137	197,523	197,469	197,438	244,936	244,515	250,086	231,625	237,521	243,588
Net Income	(907)	(5,981)	1,454	3,405	(10,480)	(12,484)	(2,878)	31,223	41,430	51,930
Cumulative balance					(10,480)	(22,964)	(25,842)	5,381	46,811	98,741

Alternate Budget 3:

The third alternate budget scenario assumes annual membership and pledge unit growth similar to Alternate Budget 2 – an annual pledge unit growth of 10. Additionally, this budget assumes maintaining at least minimum UUA Fair Share Compensation salaries for the Minister and DLRE.

Expenses are slightly greater with Alternate Budget 3 compared to Alternate Budget 2. The aforementioned budgets included 3% annual growth in total compensation for the Minister and DLRE, whereas Alternate Budget 3 includes minimum UUA Fair Share Compensation in 2006/07 and with the following increases. The Minister’s salary increases 5% annually, and the DLRE’s salary increases annually for additional RE credentials (per our current contract with the DLRE), plus 5%.

Under the assumptions of Alternate Budget 3, a successful Chalice Lighter Grant would help offset the proposed negative spending in the next two years, but additional pledges or special fundraising would be necessary to meet the proposed expenses. As described with the other projected budgets, when the current mortgage retires in 2007/08, net income is projected to be positive by 2008/09.

1. Assume membership and pledge units increase by 10 per year instead of the current 5 pledge unit increase.
 2. Assume minimum UUA Fair Share Compensation guidelines (01/01/2006) for Minister and DLRE salaries.
- Actual budgets from 2001/02 through 2004/05, proposed budget for 2005/06, and projected budgets for the next five years.

Fiscal year	< Historical financial statements				Current	Projections >					
	2001/02	2002/03	2003/04	2004/05	Estimate 2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	
INCOME											
4300 · Pledge Receipts (in-hand)	160,133	157,717	165,804	171,251	194,074	200,095	215,193	230,754	246,778	263,265	
Total 4000 · INCOME	190,230	191,542	198,923	200,843	234,456	232,031	247,208	262,848	278,951	295,518	
EXPENSE											
6020 · Director of LRE	25,357	29,941	10,478	-	43,032	52,632	58,026	60,789	63,829	67,020	
6200 · Minister	62,682	66,395	68,049	69,718	70,474	75,658	79,441	83,413	87,583	91,963	
Total 6000+7000 · Personnel	118,539	129,502	120,716	109,781	154,917	170,977	181,374	189,366	197,869	206,772	
Total 5000+6000+7000 · EXPENSE	191,137	197,523	197,469	197,438	244,936	255,894	267,135	251,796	261,182	270,986	
Net Income	(907)	(5,981)	1,454	3,405	(10,480)	(23,863)	(19,926)	11,052	17,770	24,531	
Cumulative balance					(10,480)	(34,342)	(54,269)	(43,217)	(25,447)	(916)	
DLRE's annual salary					32,500	40,000	44,100	46,200	48,510	50,936	
Minister's annual salary					53,560	57,500	60,375	63,394	66,563	69,892	

Alternate Budget 4:

The fourth alternate budget scenario assumes annual membership and pledge unit growth similar to the original Budget (p. 13) – an annual pledge unit growth of 5, and assumes pledge per unit that is 10% greater than projected with the second figure on p. 11. Additionally, this budget assumes maintaining at least minimum UUA Fair Share Compensation salaries for the Minister and DLRE (similar to Alternate Budget 3).

Under the assumptions of Alternate Budget 4, there is proposed negative spending in the next two years, and additional pledges or special fundraising would be necessary to meet the proposed expenses. As described with the other projected budgets, when the current mortgage retires in 2007/08, net income is projected to be positive by 2008/09.

Ten percent greater pledge per unit improves net income more quickly than an assumed increase in membership; consequently, the negative Cumulative balance projected for the next two years is not as great when increased membership is projected and mean pledges increase as initially projected.

1. Assume membership and pledge units increase by 5 per year and pledge per unit is 10% greater than projected in the figure on p.11.

2. Assume minimum UUA Fair Share Compensation guidelines (01/01/2006) for Minister and DLRE salaries.

Actual budgets from 2001/02 through 2004/05, proposed budget for 2005/06, and projected budgets for the next five years.

Fiscal year	< Historical financial statements				Current	Projections >				
	2001/02	2002/03	2003/04	2004/05	Estimate 2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
INCOME										
4300 · Pledge Receipts (in-hand)	160,133	157,717	165,804	171,251	194,074	214,373	224,994	235,870	247,000	258,385
Total 4000 · INCOME	190,230	191,542	198,923	200,843	234,456	246,309	257,009	267,964	279,174	290,638
EXPENSE										
6020 · Director of LRE	25,357	29,941	10,478	-	43,032	52,632	58,026	60,789	63,829	67,020
6200 · Minister	62,682	66,395	68,049	69,718	70,474	75,658	79,441	83,413	87,583	91,963
Total 6000+7000 · Personnel	118,539	129,502	120,716	109,781	154,917	170,977	181,374	189,366	197,869	206,772
Total 5000+6000+7000 · EXPENSE	191,137	197,523	197,469	197,438	244,936	255,894	267,135	251,796	261,182	270,986
Net Income	(907)	(5,981)	1,454	3,405	(10,480)	(9,585)	(10,126)	16,168	17,992	19,652
Cumulative balance					(10,480)	(20,065)	(30,190)	(14,023)	3,969	23,621
5420 · Debt Service (Mortgage)	25,134	24,243	24,193	24,193	24,192	24,192	24,192	-	-	-
Facilities (less mortgage)	14,657	13,908	18,467	20,948	16,541	17,037	17,548	18,074	18,617	19,175
Pledges	141,000	170,000	175,000	180,000	186,500	216,538	227,266	238,252	249,495	260,995
Proportion of pledge in-hand	113.6%	92.8%	94.7%	95.1%	99.0%	99.0%	99.0%	99.0%	99.0%	99.0%

Having a full time DLRE, improved stewardship, and improved membership coordination should improve membership growth, pledge unit growth, and mean amount per pledge unit. Monitoring our success and checking annual budgets against these projections will be important to sound fiscal management for the UUFCC.

ORGANIZATIONAL PLAN

The current UUFCC organizational structure needs to be improved to better meet the needs of a growing congregation. The current structure includes one Board of Trustees, which is responsible for governance, administrative, and programmatic functions of the UUFCC. The Alban Institute report (Appendix I) identifies concerns that: activities and communication are disorganized, the Board micromanages committees, there is sometimes lack of accountability, and there is lack of clarity in terms of responsibilities – symptoms of a congregation in transition from “Pastoral” to “Program” size. Developing an improved organizational structure was strongly emphasized by the Congregational Board Planning Cluster (Appendix H).

“The leadership of a governing board frequently needs to become more narrowly focused on casting the strategic vision and direction, setting larger priorities and initiatives and dealing with by-laws and other procedures in order to maintain continuity with the larger mission and purpose. The management question is ‘are we doing it right?’ and the leadership question is ‘are we doing right things?’ UUFCC has grown to the point where there are staff positions and committees to do the work of management. The board needs to lead in order to provide that unifying vision, purpose and direction so that you don’t have people moving in multiple directions at the same time. There is the need for more work in strategic and long-range planning with better communication to and buy-in from the members of the fellowship as a whole. There is also the need for leadership development training prior to folks serving on committees and on the board.”
The Alban Institute report (Appendix I).

The Alban Institute report (Appendix I) suggests that we should have fewer committees, indicating that some committees are being served by the same individuals. Combining committees should effectively reduce the number of committees in which individual volunteers are involved while simplifying the organizational structure.

Congregational Board

1. The UUFCC community size is at a threshold that warrants a change in organizational structure to more effectively govern activities. Implementing this change will be instrumental to facilitating growth.
2. Formalized and documented protocols will facilitate effective committee business, including such items as a Board meeting protocol and maintaining a Board and UUFCC events calendar.
3. Financial responsibility is essential. Two overarching needs identified were maintaining year-around Stewardship and Finance Committees.
4. Successful leadership should be cultivated through a leadership development program.
5. A Volunteer Coordinator will help ensure that important programmatic functions are sustained.

Governance Structure

Governance for Unitarian Universalist Congregations describes four congregational sizes and suggests effective governance structures (<http://www.uua.org/cde/education/Governance.pdf>) for each. Four categories include (based on worship attendance): Family (0 – 50), Pastoral (50 – 150), Program (150 – 350), and Corporate (350 – 500+). “As we move from smaller to larger, the body to which the congregation delegates authority increases in complexity, and often in formality. This formality is sometimes seen as un-Unitarian Universalist, inconsistent with Unitarian Universalist principles and authentic congregational life.” Many congregations are Family to Pastoral size, so we often misinterpret this commonality among congregations as an organizational value, when it is really a function of size. In other words, the needs of a Program-size congregation necessitate more formal governance structure than that required by a Pastoral-size congregation.

As a congregation’s membership increases from Pastoral to Program size, “the relationships among projects and leaders are becoming too complex to be coordinated solely through board discussion and pastoral diplomacy” (*The In-Between Church: Navigating Size Transitions in Congregations*, by Alice Mann, An Alban Institute publication). The current UUFCC Board members include representatives from the Sunday Services and Religious Education chairs, illustrating emphasis on Programs, while our current size (268 members, 147 attending worship) suggests that the Board’s priority should be on policy and overall congregational leadership (e.g. vision and mission). Skilled program leadership will be essential to effective program teams, but should be organized through a Program Council that operates parallel to and in coordination with the Board of Directors.

The following governance organizational structure has been conceived based on input from the UUA (<http://www.uua.org/cde/education>), suggestions in the Alban Institute report (Appendix I), examples of working formats for other UU congregations (see <http://www.uufr.org/> UU Fellowship of Raleigh, NC), and considerations for our own needs at UUFCC. The organizational structure proposed here should be interpreted as a guide. As the Working Group on Organizational Structure proceeds with this process, soliciting input from friends and members through meetings and workshops, specific details of this general recommendation will be determined.

The Board of Directors should consist of President, President Elect, Past President, Secretary, Treasurer, and four Trustees (9 people total). Members to the Board of Directors should be elected by the UUFCC congregation (similar to the current format). Nine people on the Board of Directors provides adequate representation (1 Board member per every 30 UUFCC members), while not being too large. Too large a group usually translates into longer meetings.

President Elect, President, and Past President will provide continuity in the leadership position. President Elect will assist the President and learn the role of President. Past President will provide guidance from two years previous experience. This 3-yr track will allow the Nominations Committee to specifically solicit members that are interested in the leadership role. This is similar to the current structure of Vice President, President, Past President; however, the name of President Elect more explicitly defines the role of this office.

Secretary and Treasurer will be similar to the current positions on the UUFCC Board (2-yr term).

Trustee I will be *ex officio* member of the Program Council (3-yr term), providing a direct formal link between the Board of Directors and Program Council.

Trustee II will be an *ex officio* member of the Administrative Council (3-yr term), providing a direct formal link between the Board of Directors and Administrative Council.

Trustee III and IV will provide two additional people on the Board who can be dedicated to special projects or focus on specific tasks that are currently before the Board. For example, one of these Trustees might take up Leadership development for the congregation, which has been identified as a goal in this document. One of these Trustees could be responsible for long-term stewardship and financial planning, coordinating activities, communication, and annual budgets among the Board of Directors, Stewardship Committee, Finance Committee, and both Councils. Details of Trustee responsibilities will be explicitly determined during the reorganization process.

The Program Council should consist of Board Trustee I, a Youth representative, and Committee Cluster Conveners from each of the following Program Clusters: Services & Music, Social Action & Outreach, Community Life & Fellowship Relations, Religious Education, (6 people total). Members of the Program Council, besides the *ex officio* member (Trustee I), should be appointed by the President of the Board of Directors. Program Council members should serve a 2-yr term (except for the Trustee), with two or three members retiring from the council in any one year.

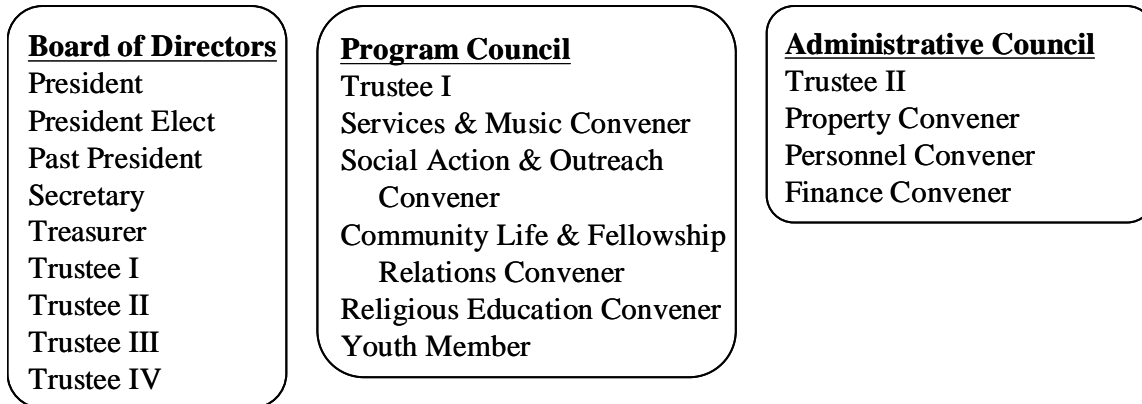
Separating the Program Council and the Board of Directors provides the opportunity for those members interested in program leadership to accept these responsibilities without the additional, and often quite different, responsibilities of congregational leadership. While the Board of Directors should focus on vision and mission, members of the Program Council will focus on making programs “happen.” The Program Council will provide leadership to the committees included in the four Planning Clusters identified in this document (see Appendices for each Planning Cluster).

The Administrative Council should consist of Board Trustee II and Committee Cluster Conveners from each of the following Administrative Clusters: Property (Buildings & Grounds), Personnel, Finance (4 people total). Members of the Administrative Council, besides the *ex officio* member (Trustee II), should be appointed by the President of the Board of Directors. Administrative Council members should serve a 2-yr term (except for the Trustee), with one or two members retiring from the council in any one year.

Under the proposed governance structure, the Board of Directors, including *ex officio* members to the Program and Administrative Councils, will be elected by the UUFCC congregation. Other members of the two Councils will be appointed by the President of the Board of Directors. Any other Chair appointments for committees within the Program or Administrative Council will be determined by the respective Council, perhaps appointed by the Chair or by the entire Council.

The following diagram illustrates the proposed governance structure for UUFCC. Although not illustrated here but similar to the current governance structure, the minister should be an *ex officio* non-voting member of the Board and both Councils and the DLRE should be an *ex officio* non-voting member of the Program Council.

Proposed UUFCC Organizational Structure



This proposed structure should be viewed as a starting point from which the Board and UUFCC congregation, through the work of the Working Group on Organizational Structure (WGOS), can begin to discuss and implement change in our current organizational structure.

Brief Overview of Implementation Strategy

- May 2006 Congregation endorses LRP, expressing desire to reorganize governance structure

- May – October 2006 Meetings and workshops to discuss / propose a new organizational structure, soliciting input from committees, friends, and members.

 During this stage of the process committees will be tentatively assigned to Clusters within either the Program or Administrative Council. The organization of Planning Clusters (see Appendices) represents a first draft regarding how these Clusters could be organized and which committees would belong to which Cluster.

 Representation on and organization of Board of Directors, Program Council, and Administrative Council will be discussed during this time.

- November 2006 Congregation votes on proposed governance and organizational structure, which will be implemented at the May 2007 congregation meeting.

- December 2006 – April 2007 The WGOS will facilitate the drafting of Board and Council position descriptions, and outline a strategy for communication among the Board, Councils, and committees. Workshops will be convened with Board, Council, and committee members.
- By-Laws and Policies will be revised to reflect new organizational structure. This will be coordinated by the WGOS.
- March 2007 Convene workshop inviting all friends and members to comment on proposed changes to By-Laws and Policies.
- May 2007 Congregation votes on proposed By-Law and Policy changes that reflect new organizational structure. New Board members are elected to new re-defined positions.
- June 2007 Submit revised UUFCC By-Laws and Policies to Commonwealth of Pennsylvania

APPENDICES

An Introduction to the Appendices

Appendices A through H contain the documentation of a series of meetings that provided the “raw material” from which this Long Range Plan was developed. Small groups of committee chairs and other interested members and friends met in facilitated meetings during December 2005. The groups were chosen with the intent of addressing related interests efficiently and providing early feedback on governance structure to the Working Group on Organizational Structure. Each group was provided with a suggested format for documenting their deliberations and asked to consider the following items in their interest areas:

- Identify and list committees within your cluster.
- Identify current strengths and challenges of this group.
- List goals for the next five years.
- Provide the objective (rationale or justification) for the goals you identified.
- Identify resources required to accomplish these goals and a timeline for implementation.

The LRP appendices summarize the goals recommended by each group. In most instances (but not always), the goals and objectives should match one for one: for example, goal number 1 corresponds to objective number 1. These appendices represent the results from these various working groups, so format and content do not always follow a single template.

The Long Range Planning Committee used these cluster group planning documents to guide us in identifying priority goals for the Fellowship as a whole and to craft the overall plan.

These appendices should serve as the starting material for regular updates (at least annually) to the current LRP plan. Similar small groups can meet to review progress against work plans, retire goals as they are achieved, and recommend new goals and work plans. Revisiting the goals and work plans annually and updating resource requirements should then flow into the overall financial management and stewardship of the Fellowship.

Appendix A: Religious Education Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees/Groups within this Planning Cluster	Current Contact
Children & Youth RE	Barb Hunziker
RE Social Action	Maren Larson
	Elaine Lau
Young Religious Unitarian Universalists (YRUU)	Dana Carlisle Kletchka
	Paul Carlisle Kletchka
Our Whole Lives (OWL)	Nigel Wilson
	Elaine Jurs
Adult RE	Betty Walker
Wonderful Soulful Wednesdays	Michelle Leebens-Mack
Library	Betsy Berry
Bookstore	Debby Ellenberger
	Melissa Alvarez

Goals

1. Create greater congregational ownership of the lifespan religious education program through
 - a. Increased financial resources for RE programs
 - b. Volunteer participation by a greater percentage of the congregation
 - c. Leadership development for RE lay leaders
 - d. The establishment of an RE archive to record the program's history
2. Plan and mount an ongoing campaign that promotes the lifespan religious education program to the fellowship, State College, and Penn State communities
3. Work to ensure that RE programs are afforded appropriately sized, adequately furnished, aesthetically pleasing space in the current building and any future expansion projects.
4. Increase RE outreach in the local and district communities.
5. Maintain and grow not only the number, but also the depth of relationships the RE program has with our congregants.

Objectives

1. Our lifespan religious education program helps define who we are as a congregation. The more we invest of our resources in RE, the more we will gain as a religious community.
2. Our religious education program is unique to this area in that it offers accessible liberal religious programming for all ages. We need to make sure that our own members are aware of this fact, and by promoting our programs in the larger community, we create the opportunity to draw in those who may be looking for an accepting spiritual home.

3. In order to cultivate a welcoming spiritual environment, we need to not only offer excellent choices in programming, but give them the space they need to flourish and grow. If RE space looks like it is a lesser priority for our congregation, then our programs, too, will appear to be a lesser priority.
4. Reaching out to our local community gives our programs visibility and puts our values into action. Reaching out to our UUA district connects us to resources and reduces our isolation.
5. A strong RE program is an effective tool for maintaining and growing a church's congregation.

Strengths

- 1 A member of the fellowship's professional staff is part of group
- 2 Volunteers of all ages
- 3 OWL program
- 4 Dedicated volunteers
- 5 Library & bookstore are excellent resources
- 6 Enthusiasm

Challenges/Opportunities

- 1 Creating a comprehensive lifespan program
- 2 University/young adult outreach
- 3 Geographic isolation from district
- 4 Space
- 5 Tendency to consider youth RE a Sunday activity
- 6 Overextended volunteers

Resources

- Annual budget
- Volunteers – UUFCC members
- UUA and JPD resources – trainings, workshops, books, curriculum
- Professional Staff Person – fulltime DLRE
- Families and Friends Fund (3 year donor commitment from UUFCC members)
- Possible Chalice Lighter Grant

Plan

Ongoing Strategies

- Continue DLRE at full-time with appropriate salary within UUA guidelines to ensure stability of and improvements in LRE program
- Work with Board of Trustees in maintaining a Safe Congregations Policy
- Increase budget line item for Leadership Development
- Encourage volunteers to participate in Leadership Development training
- Increase budget line item for child care
- Provide child care for meetings and activities to encourage greater parental participation
- Encourage greater participation in RE by providing training and recognition of volunteers
- Work toward establishing RE archives
- Work toward developing RE brochures for Fellowship and wider community
- Continue expansion of RE social action projects and RE programming

- Continue expansion of Intergenerational activities and worship throughout church year
- Continue to participate in district-wide activities for Middle School Youth, YRUU, and adults
- Work toward increased participation in Campus Ministry at Penn State
- Work toward becoming a sponsor of the Focus on Strong Families annual conference in Centre County
- Work with Aesthetics Committee to provide aesthetically pleasing space
- Continue to work with Building Expansion Committee in assessing the needs of the LRE program
- Continue to encourage and provide funding for DLRE to pursue further training in the UUA's RE Credentialing program

Recorder of this document: ___ Paul Carlisle Kletchka _____ Date: __01/10/2006__

LRP Cluster Convener: _____ Jean Wiant _____ Date: __01/10/2006__

UUFCC Board Liaison: _____Helen Volz_____ Date: __02/15/2006__

UUFCC President: __Arian Zarkower & Bob Newnham___ Date: __04/15/2006__

Appendix B: Community Life & Fellowship Relations Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

Caring

Communications

(Newsletter, Publicity, Website, E-news,
Bulletin boards)

Fellowship Relations

Membership

Small Group Ministry

Social Events

(Congregational retreat, 4th Wednesday Game Night,
Dinner club, Sunday Service support teams)

Current Contact

Bev Henshaw

Various people

Mary Moyer

Laura Brown

Bev Henshaw

Various people

Goals

1. Establish the position of Volunteer Coordinator with a volunteer member over the next 3 years looking toward a paid position in 5 years.
2. Establish an Outreach Program to the State College Area Community
3. Establish Support groups for special groups (Grief, divorce, etc.)
4. Establish a program of contacting members/friends at least 3 times a year other than the financial canvass (Remembership)
5. Establish a system of a phone call on a daily basis for those who live alone.
6. Provide opportunities for those new to UUFCC to become involved by listing committees and meeting times particularly in e-news.
7. Training for home and hospital visitation
8. Organized effort to include new members in social activities such as dinner club and other small groups.
9. Block ad each month in CDT for publicity then increase to weekly over next 3 years
10. Place newsletter on our website, distribute by e-mail, and have hard copies available
11. Increase the number of Groups in Small Group Ministry Program and expand to include a youth group in SGM.

Objectives

- To increase engaged membership by being more proactive and focused to attract and retain new members and friends, while nurturing long-time members.
- To provide opportunities for members/friends to participate in the life of the community and feel a part of the community
- To carry out the **Vision** of the UUFCC which is to be a place where individuals feel safe, supported, empowered, challenged, and energized to share their talents, live their values and be part of a beloved community

Strengths

- Most committees in cluster are structured and have clear responsibilities or mission
- Most committees in cluster provide varied opportunities for people to connect with one another or to the larger community.

Challenges and Opportunities

- Could benefit from better use of Member/Friend gifts and talents
- In house brochures outdated
- Path to membership not clear
- Need to improve or create systems so people don't "fall through the cracks"

Resources

We will need more involvement of volunteers for most of the goals. Financial resources will be needed for the increased budget for publicity and a paid position of Volunteer Coordinator.

Timeline / plan

- Goal 1. Explore positions of Volunteer Coordinators in other UU Congregations. Institute some of the functions on a volunteer basis. It has been demonstrated that congregations with a full or part-time Volunteer Coordinator on their staff have experienced growth at a rate two and three times that of other congregations. At the end of 5 years consider having a paid position.
- Goal 2. Develop new in house informational brochures. Continue to expand user friendly "paths to membership" within the next year.
- Goals 3&7. Train facilitators for support groups and those who will be home and hospital visitors within 2 years
- Goals 4&5. Recruit volunteer members to begin doing phone calls this in the Fall 2006. Organize list of members/friends who live alone and set up a phone tree for calling by Fall 2006.
- Goals 6&8. Encourage committees and groups that are meeting to put information on E-news and in newsletter calendar. Give names of new members/friends to members of committees and groups they might be interested in. Sept 2006
- Goal 9 Plan to increase budget yearly to achieve weekly ads over next 3 years. Begin Spring, 2007
- Goal 10 Sept 2006. Newsletter hard copy is excellent PR and outreach, particularly to hand out to newcomers. Many people do not use computers as their source of information. Need both media.
- Goal 11 In addition to the 3 existing groups a new SGM group will be forming in Jan/Feb 2006. Expanding into Youth SGM programming will be in 2007 in collaboration with the RE program.

Recorder of this document: ___ Bev Henshaw _____ Date: __12/18/2005__

LRP Cluster Convener: _____ Bev Henshaw _____ Date: __12/12/2005__

UUFCC Board Liaison: _____ John Schmidt _____ Date: __01/15/2006__

UUFCC President: __Arian Zarkower & Bob Newnham__ Date: __04/15/2006__

Appendix C: Social Action & Outreach Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

Social Action:

Human Rights, Human Needs, Environment,
Children's Issues, End of Life/Dignity of Life

Campus Ministry

Denominational Connections

(UUA, JPD, UU-UNO, USC)

Interfaith Connections

Current Contact

Jan Perison

Maren Larson

Betty Herron

Goals for the Next Five Years

1. Move from exclusive social action to inclusive social action. Involve more people in the decision making.
2. Demonstrate with an all-fellowship-inclusive small social action project with a local community focus chosen by the fellowship as a whole. Institutionalize the learning from this pilot project.
3. Create documentation (hard copy and electronic) for recurring events.
4. Improve our campus ministry and outreach.
5. Improve our connections within the denomination.

Objectives

1. Make the process of choosing our social action projects transparent to the whole fellowship. Vote annually on the major projects to support. Prioritize to force us to live within our means. Communicate our successes to promote fellowship cohesiveness.
2. Use this pilot project as an illustration of how an overall structure for social action can work. Involve the community in State College. Use to market UUFCC within the community.
3. Foster continuity and open process. Prospective volunteers will have a guide book and understand the level of commitment and skills required. With the infrastructure documented and in place, we can respond quickly to time sensitive topics.
4. Provide a spiritual home for University student UUs.
5. Learn from our connections within the denomination.

Strengths

- We have passionate people knowledgeable in many aspects of social action.
- We have recurring all-fellowship social action events (Book for Every Child, Freedom Seder)
- We have new members with untapped potential.
- We mobilize for special events (Peace Marches, Disaster Relief, Letter Writing Campaigns).
- We have numerous one-person-connections to community organizations.
- We have excellent representation at UUA General Assembly

Challenges and Opportunities

- The one-person-connections are exclusive; it can be difficult to replace these liaisons or add more people resources to the connections.
- People are emotionally attached to and “own” the projects/social actions they support.
- There is an opportunity to build fellowship through social action.
- We may be missing important support resources through the JPD, we need to be more actively engaged in district activities
- We need leadership development in all areas.
- We need documentation of recurring events including how to plan and execute the action, what resources are required, etc.
- We have a bare minimum commitment to campus ministry (PSU faculty/staff sponsor and Heather) and denominational connections (UUSC rep/coordinator).
- We need to prioritize as a congregation where we want to focus our social action and outreach efforts.
- We need to be creative in finding ways to support our social actions financially, including learning how to ask for monetary support.
- We need to communicate openly all social actions and fellowship contributions.
- We have good resources already in the Fellowship library, the JPD, and the UUA.

Resources

Identify human and physical resources; status of current resources, and an estimate of required resources to achieve our goals.

Internal resources: Committed fellowship volunteers! All committees staffed! Space to meet. Space to store materials for recurring events.

External resources: Outside facilitator for the facilitated discussion/workshop in support of Goal 1, depending on the availability of funds.

Current budget: for 2005-2006 fiscal year:

Social Action Committee	\$500.00
Campus Ministry	\$100.00
Denominational Connections	\$500.00

Timeline / Plan

<u>Timeline</u>	<u>Goal</u>	<u>Measurable steps and any explanation of plan</u>
Dec 2005	1	Begin monthly report to the Board of monetary contributions in “in & out” accounts.
Feb 2006	1	Establish open communication with Social Action –RE and youth group for coordination of effort and mutual assistance.
	1	Sponsor a facilitated discussion/workshop (Alban Institute?) with a special focus on transferring “exclusive ownership” of social action initiatives to the fellowship as a whole. How can we both value the expertise of our individual members and tap into the potential of more of fellowship?

- | | | |
|-------------|------------|--|
| May 2006 | 1 | Report to congregation at the annual meeting all fellowship social actions and monetary contributions. Annually |
| Nov 2006 | 1 | Report to congregation at mid-year meeting all fellowship social actions and monetary contributions. Annually |
| Mar 2006 | 2 | Solicit ideas for the “demonstration” all-fellowship social action and outreach program with a local community focus for the next fiscal year. |
| Apr 2006 | 2 | Prepare list of candidate all-fellowship social action and outreach programs for congregation vote at annual meeting. Candidate programs should include enough information and rough planning for prioritization/voting at annual meeting. |
| May 2006 | 2 | Vote at annual meeting on the pilot all-fellowship social action project for the next fiscal year. |
| Oct 2006 | 2 | Plan and conduct the pilot all-fellowship social action and outreach program during the fiscal year. |
| Feb 2007 | 2 | Incorporate learning pilot all-fellowship project into an annual plan for soliciting project ideas, choosing one, and executing the chosen project each year. |
| Feb 2006 | 3 | Begin collecting existing “how to” documentation (for example, how to plan for and transport a busload of peace marchers to DC for a demonstration, or how to put on a Freedom Seder). |
| Apr 2006 | 3 | Identify existing social action and outreach efforts with no documentation, but with expert knowledge within the fellowship. |
| May 2006 | 3 | Ask experts to document their social action/outreach efforts (or provide interviewer to document). |
| Jun 2006 | 3 | Begin to compile the existing “how to” documents and store in hard copy and electronically. |
| 2007 – 2008 | 4 | Recruit Fellowship member who is also PSU Faculty/Staff to reinvigorate Campus Ministry and Outreach |
| 2007 – 2008 | 4 | Increase PSU student participation |
| Annually | 5 | Fellowship leadership participation in JPD activities, e.g. Spring Conference, Music & Worship Arts Festival, and Leadership training |
| Annually | 5 | Continue active participation in annual UUA General Assembly |
| Sept. 2006 | 1, 2, 4, 5 | Social Action and Outreach leaders participate annually in fellowship volunteer leadership training. |
| As needed | 1 | Mobilize for time sensitive actions, making use of and adding to the “how to” documentation. |
| | 3 | During/after each social action/program, update the “how to” documentation. |

Recorder of this document: Martha Butler Date: 12/7/05

LRP Cluster Convener: Martha Butler Date: 12/7/05

UUFCC Board Liaison: Martha Butler Date: 01/15/06

UUFCC President: Arian Zarkower & Bob Newnham Date: 04/15/2006

Appendix D: Services & Music Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

Music

Sound System and Audio taping

Sunday Services

Current Contact

Mary Alice Graetzer

Art Curtze & David Stickell

Bob Newnham & Phil Halleck

Music

Goals

1. Adopt proposed procedures for operation of the committee in the first year.
2. Increase the music budget, including salaries, incrementally from the current 5% to 10% of the total UUFCC budget in the 5th year.
3. Increase the Music Director's position to 1/3 time in the 1st year and to at least 1/2 time in the 5th year.
4. Create a paid choir accompanist position in the 1st year at a minimum of \$100/month for 9 months; increase that salary to UUA or UUMN guidelines in the 3rd year.
5. Form a string group and a brass group in the 1st year, an auditioned small mixed chorus in the 2nd year, and men's and women's choirs by the 5th year.
6. Increase the times the choir sings in place like nursing homes and the Park Forest Day Nursery, and also in interdenominational events, such as choir exchanges and combined choir events.
7. Acquire risers to accommodate 40 singers as soon as possible.

Objectives

1. The ground rules for committee functioning should be clearly established, perhaps through a mission and covenant statement and job descriptions for each committee.
2. Adequate funding will be required to provide an expanded, exciting, and high quality music program for UUFCC.
3. To provide the desired music program the Music Director will be required to work more hours.
4. To create a paid choir accompanist position. This would be a necessary addition to our music program.
5. We want to provide diversified choral and instrumental opportunities for UUFCC members/friends.
6. We want to increase our music program's visibility in the community.
7. Adequate risers are needed for the safety and comfort of the choir and to increase rental possibilities.

Resources

The music program depends on the volunteer time and efforts of numerous UUFCC members/friends (singers, pianists and other instrumentalists) and the paid Music Director. For the past 9-10 years we have organized a concert series with the goal that our 50% share of the

donation proceeds would cover expenses for the music program that our budget did not cover. Our major expenses are purchasing music for the choirs and tuning and maintaining our pianos. The committee budget was \$500 for many years; this year it has been raised to \$1500. The committee volunteered to raise at least \$500 from a concert series. Since we anticipate exceeding \$2000 in expenses this year, we hope to earn more than \$500 from the concerts. We would like to attain a budget level that would make it unnecessary to have a concert series to cover our expenses.

Adequate space is a concern for the music program. The Music Director's space is divided between Room 6 and the corner of the sanctuary behind the choir. We hope that any future building expansion will include adequate office space for the Music Director and adequate storage space for music and instruments.

Timeline / plan

1 st year:	Mus. Dir. \$11,320, + accompanist	\$900 = \$2540 increase over 2005.
2 nd year:	\$13,870	\$1350 = \$3000 increase over 1 st year.
3 rd year	\$16,400	\$1600 = \$2780 increase over 2 nd year.
4 th year:	\$18,950	\$1800 = \$2750 increase over 3 rd year.
5 th year:	\$21,500	\$2000 = \$2750 increase over 4 th year.

The 5th year salary for the Music Director is in the mid-range for a ½ time position in the current UUA salary guidelines for GeoIndex 3 churches. "The Music Director's salary in the current year is \$8780. FICA contributions have not been considered in any of these salary figures. The accompanist in the 2nd year would be getting \$10/hour for 15 hours/month for 9 months. In the 5th year the rate would be about \$15/hour. It is currently unclear what the UUA or UUMN guidelines would be for this position.

Our original intention was to make the Music Director's position ¾ time in the 5th year. When numbers were plugged into the timeline, this seemed to be an overly optimistic goal based on an estimate of what the UUFCC budget might be in 5 years. With salaries, FICA and a committee budget of at least \$2500, the music budget would almost definitely exceed the 10% that is our goal for the 5th year. However, the Music Director might not be able to work on all the choral goals with a ½ time position. The salary table is instructive and illustrates what a vibrant music program needs. Our committee hopes that it is both reasonable and achievable.

One last goal, #7, is to acquire good risers for the choir. Our current estimate of the cost is about \$8000.

Submitted by Mary Alice Graetzer, chair, for the Music Committee
 Committee members are: John Creager, Reid and Gail Hendershot, Joe Kulik, Cathy Vandenberg, Art Curtze, Carl Volz, and Amanda Silliker, ex officio. Dan Moerdyk was a member for this report.

Sound System and Audio Taping

Goals

1. Install permanent speakers in the front lobby, social room, and perhaps R.E. wing with wired self-powered controllable on/off and volume at each speaker.
2. Equip podium with a gooseneck style microphone in addition to the existing boundary type microphone.
3. Provide more audio space for service audio equipment.
4. Need to make the Sunday Services audible to our aging population.

Objectives

1. To provide other people in the building a better opportunity to hear the service.
2. This will be more user-friendly to those persons not trained in using microphones on the podium.
3. Providing more audio space for service audio equipment would:
 - a. Provide code approvable exit (currently partially blocked by sound system)
 - b. Eliminate congestion in the area.
 - c. Could move audio booth into the Sanctuary's sound field for improved monitoring but would still be out of the way, as it is now.
 - d. Open up space for choir and improve their projection into the room.

Resources

Would require increased budget for Sound System to purchase and install equipment and for renovations.

Timeline / plan

Goals # 1 and 2 could be achieved in the next budget year

Goal # 3 needs to be addressed by the Sunday Services Committee, and the Aesthetics Committee.

Submitted by Art Curtze

Sunday Services

Goals

The Sunday Service Committee plans to continue developing and coordinating Sunday services, working closely with the minister, the DLRE, and the Music Director. Our overall goal is to structure services that are responsive to the individual and collective needs of the Fellowship and that are consistent with its mission, vision, and covenant. We will judge our success, and the need for any substantial changes, from feedback submitted by individuals through congregational surveys and from directions or suggestions from the Board of Trustees. We plan to continue to vary service structures in such a way as to provide all with some degree of satisfaction.

1. Develop and coordinate Sunday services
2. Respond to new missions and formats as directed or suggested by the Board of Trustees.

Objectives

1. Support the mission of providing a spiritual home for persons who seek to know truth for themselves. Services provide spiritual, social, and intellectual outlet for the Fellowship.
2. Problems or opportunities are best identified by the broad Fellowship contacts of the Board of Trustees.

Strengths

- A dedicated, organized, and innovative group of committee members and Fellowship members.

Challenges and Opportunities

- No major challenges or obstacles (Minister's sabbatical has been resolved).
- The few challenges have been and continue to be centered on the broad, and sometimes conflicting, desires of individual members with regard to structure of services.

Resources

Resources required are limited to a small budget to cover honoraria and travel expenses for visiting speakers. A small budget for external speakers.

Timeline / plan

Services will be planned at least 8 weeks ahead. A copy of the current planning schedule is included below.

Recorder of this document: ___ Phil Halleck _____ Date: ___12/17/2005___
LRP Cluster Convener: _____ Bev Henshaw _____ Date: ___12/17/2005___
UUFCC Board Liaison: _____ John Schmidt _____ Date: ___01/15/2006___
UUFCC President: ___Arian Zarkower & Bob Newnham___ Date: ___04/15/2006___

Appendix E: Personnel Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

Committee on Ministry
DLRE Relations Committee
Sabbatical Committee
Leadership Review Committee

Current Contact

Lois Durran
Sue Smith
Betty Walker
Bob Herron

Goals for the Next Five Years

1. Increase Music Director position from ¼ to ½ time
2. Hire a professional cleaning service
3. Hire a financial secretary on staff
4. Work toward Volunteer Coordinator on staff
5. Ongoing Sabbatical Committee with an annual budget line-item
6. Document committee responsibilities, procedures for finding members, and define term limits to allow for continuity
7. Work toward student/intern minister
8. Keep all staff salaries within UUA guidelines

Objectives

1. Support our programs in proportion to their importance to our community
2. Maintain a clean building to make our facilities attractive for rental and to members/friends and visitors.
3. Support continuity in financial management
4. Support efficient coordination between committees and staff
5. Avoid large expenditures in sabbatical years
6. Involve new members in committees, and prevent burn-out
7. Support our minister in a mentoring role; contribute to our denomination

Strengths

We have a full time minister.

We have a full time director of lifespan religious education (DLRE)

We have a ¼ time director of music

We have an efficient office assistant

We have an efficient Financial Secretary

The Leadership Review Committee has well set-up procedures and documents

The Sabbatical Committee has thoroughly documented preparations for our minister's first sabbatical

Challenges and Opportunities

Communication with new DLRE about traditions and Sunday Service involvement

Lack of continuity in financial matters

Unorganized identification of Leadership Review Committee members

Resources

- Increase Music Director position to ½ time
- Professional Cleaning Service – 8-10 hours per week
- Professional Financial Secretary - 5 hours per week
- Volunteer Coordinator – volunteer position to begin
- Budget line-item for Sabbatical - \$500 per year

Timeline / Plan

<u>Timeline</u>	<u>Goal</u>	<u>Measurable steps and explanation</u>
Now	6	Staff Leadership Review Committee
Annually	5	Budget line-item for Sabbatical expenses
Feb 2006	2	Contract with a professional cleaning service
	1	Gradual increase of Music Director’s salary
Feb 2006	3	Contract a financial secretary
	4	Volunteer Coordinator – volunteer position
	6	Evaluate committees in this cluster – document responsibilities and term limits
July 2008	1	Music Director position to 15 hours weekly
July 2010	1	Music Director position to 20 hours weekly
	4	Volunteer Coordinator – Staff position (paid)
	7	Student/Intern minister position in place

Recorder of this document: Lois Durran

Date: 12/12/2005

LRP Cluster Convener: John Schmidt

Date: 12/12/2005

UUFCC Board Liaison: Toby Carlson

Date: 02/15/2006

UUFCC President: Arian Zarkower & Bob Newnham

Date: 04/15/2006

Appendix F: Property Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

Aesthetics
Interior
Exterior & Grounds

Current Contact

Wendy Snetsinger
Peg Dobrinska
Ron Smith

Short-Term Goals

1. Building expansion (committee's report is included below)
2. Rotating displays to maintain aesthetics and freshness of sanctuary
3. Maintain outdoor area at high level
4. Find volunteers, staff, and funds to keep computer hardware and software in shape
5. Encourage members to take ownership to maintaining cleanliness of facilities
6. Develop coordination of fellowship calendar to benefit fellowship members and potential renters

Longer-Term Goals

- Commissioned art
- Endowment for aesthetic enhancement
- Grow and maintain memorial garden and meditation center
- Utilize facilities to uphold fellowship mission

Objectives

Overall objective: Provide an interior and exterior aesthetic environment for personal enrichment

1. Provide clean, safe, and beautiful space for the Fellowship to function effectively
2. Accumulate an inventory of inspiring artwork to allow rotation for freshness
3. Provide an appealing campus
4. Enable efficient administration and appealing graphic arts for effective communication

Strengths

- Building Expansion Committee has completed concept drawings for a building expansion with the help of an architectural firm
- We have an aesthetically pleasing building and grounds
- We have five acres and thus open space, room for expansion, and room for activities
- Children's playground
- Nice plantings throughout grounds
- Lighted building exterior and parking lots
- Sanctuary is open, well lighted, and has a nice view outdoors through glass doors
- Large outdoor free-form modern concrete sculpture
- Welcoming signage
- Changing art exhibits in sanctuary
- Calligraphic nametags

Challenges and Opportunities

- Maintenance of grounds at a high level
- Labyrinth maintenance
- Acoustics of social room are poor
- Improve acoustics of sanctuary
- Quantity of parking, especially for special events
- RE space is too limited
- Library encroaches on social room space
- Social room, lobby, and coat room are cramped
- Wholly inadequate storage space
- Cluttered, unattractive hallway
- Maintaining and trouble-shooting Fellowship computer hardware and software for staff and volunteer productivity and satisfaction
- Aesthetics Committee not funded now

Resources

1. Capital campaign is necessary to support the building expansion (estimated at \$140 per square foot)
2. People are in place but need to rotate their schedules; \$1,000 per year in budget would enable this goal for aesthetics.
3. Wider participation of Fellowship members; need families with children to participate in maintenance of campus to build a sense of ownership
4. Find volunteers, staff, and funds to keep computer hardware and software in shape; annual budgeted amount necessary for support of this activity

Timeline

1. Building: 5-year plan started in early 2005 and can finish in three or four years if a capital campaign were in place soon
2. Rotational art is underway; need line item in budget for support
3. Campus maintenance is ongoing; need twice a year work parties of more than 50 people, and possibly twice yearly professional cleaning of building interior, with routine custodial maintenance
4. Ongoing; review for need to change or upgrade computer hardware/software at least once per year

Recorder of this document: ___Peter Jurs___ Date: ___12/15/2005___

LRP Cluster Convener: ___Peter Jurs___ Date: ___12/15/2005___

UUFCC Board Liaison: ___Michelle Leebens-Mack___ Date: ___01/15/2006___

UUFCC President: ___Arian Zarkower & Bob Newnham___ Date: ___04/15/2006___

UUFCC - Building Expansion Committee Report

November 13, 2005

The UUFCC Building Expansion Committee has held 12 meetings since January 2005. The Committee consists of nine members: Betsy Berry, Brian Dempsey, Karen Dickinson, Louise Goldschmidt, Phil Hawk, Andy Lau, Michelle Leebens-Mack, John Schmidt, and Ron Smith, chair. It also includes ad hoc members, the minister Mark Hayes, the Director of Lifetime RE Jean Wiant, past Presidents Rinehard Graetzer and Bob Seibel, and President Sarah Cook. In less than a year, we have 1) used the April 18, 2004 Building Expansion Task Force Report as our guide for future building expansion, 2) interviewed three architectural firms to determine who would be our conceptual design architects, 3) chosen HPArchitects (Alan Popovich and Claudia Albertin) for conceptual designs, 4) held several meetings with the architects, and 5) presented conceptual designs on October 30th to the UUFCC for comments and questions.

When our present building was constructed in 1991, we had to cut back for financial reasons, so that we ended up somewhat short of the number of Religious Education rooms we desired. In a 1988 report, we called for a building with 8 RE rooms, but we built only 6. We wanted 4 office spaces, but only 2 were built. We wanted a larger social room than the present one, but were satisfied with the one built, though we did not project that it would be used as a storage room and library also.

From the first, our major concern was for additional **RE space**. RE accommodations, with thought toward a possible use for some type of day care or Montessori school, was foremost in our concern for any building expansion. However, after a recent report from a special committee led by Paula Ralph on renting for outside daycare or Montessori school use, our present committee decided not to be driven by the needs of daycare unless that was a specific UUFCC commitment. Not all RE rooms are designed to Pennsylvania daycare standards, but they can be if the UUFCC makes that commitment.

Second, the total of 8 proposed **RE classrooms** are considerably larger than most of our present classrooms, but they are not as large as proposed in the 2004 document. Five of our present classrooms are 264 square feet, and the proposed classrooms are similar in size to the present Room 6, at the end of the RE wing. One multiuse room is proposed to be about 1,000 square feet.

Third, we wanted to make sure that we had adequate **office** space. To this end the architects have created offices for the Minister, RE Director, and Music Director, and a larger administrative office.

Fourth, architectural plans call for enlarging the **Social Room** and creating a **Sitting Area** and **Reading Room** to open up the new **Entry/Lobby** south to the outside. In addition, a **Courtyard** is proposed, enclosed by the new RE addition and Social Room. Off the Social Room is a **Picnic Pavilion**, and the **Kitchen** has been moved east to service the social activities.

Fifth, we knew that the 2004 Report emphasized additional **storage** space several times. To this end, each additional space proposed has storage capabilities, and a proposed unfinished basement (4,300 sq. ft.) under new RE rooms should effectively serve for storage of seldom-used material.

Sixth, ecological and **Green design** principles, including lighting and heating, are important considerations, including an electric-generating windmill to suit our environmental needs.

Seventh, the projected **building costs** are \$133 per sq. ft. A building project of 13,400 s. f. would be about \$2 million. (Included in the 13,400 is an unfinished basement/mechanical area of 4,330 s.f.) It is now up to the Board, the UUFCC, and our financial resources to proceed with the project.

Ronald A. Smith, Building Expansion Committee, Chair.

Appendix G: Finance Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

Finance

Endowments and Directed Gifts

Other Fundraising (within the scope of this committee are groupings concerned with specific continuing activities:

Stewardship, Grocery Coupons, Service Auction, Yard Sale)

Current Contact

Ken Riznyk

Robert Herron

Sue Smith

Vic Russo

Goals for the Next Five Years

1. Raise operating budget (and pledge income) to more fully meet Fellowship needs
2. Keep salaries to personnel competitive (fully meeting UUA salary guidelines)
3. Maintain fair-share payments to the UUA and the Joseph Priestley District
4. Develop successful financing of building addition
5. Add additional staff support (custodial, finance-related, etc.)
6. Develop a Finance Committee adequate to meet current and increasing demands
7. Develop a year-round Stewardship Committee
8. Encourage planned giving

Objectives

- Develop and maintain finances adequate to support all Fellowship activities

Strengths

- A steady expansion in recent years of activities and commitments has included (1) resuming fair-share payments to the UUA and the Joseph Priestley District, (2) hiring a full-time DLRE, and (3) significantly expanding the position of Music Director
- A base of loyal pledgers
- Significant funds attracted by effective policies and administration of the Endowment and Direct Gifts Committee
- Two particularly successful, annual fundraising activities (service auction and yard sale)

Resources

UUFCC members and friends are the principal resource for the finances of the Fellowship

Timeline / Plan

May, 2006 Full staffing (chairs and active members) of all finance-related committees

May, 2008 Achieve raising pledge level to match budget needs [this date marks the end of the “Pacesetter Fund,” an informal “beyond the normal pledge” fund to which some Fellowship members currently contribute]

2008/09 Develop financing for a major building addition

Recorder of this document: Herman Richey

Date: December 7, 2005

LRP Cluster Convener: Herman Richey

Date: December 7, 2005

UFCC Board Liaison: John Schmidt

Date: January 15, 2006

UUFCC President: Arian Zarkower & Bob Newnham

Date: 04/15/2006

Appendix H: Congregational Board Plan

Date: January 2006

Planning Timeline: 2006 – 2010

Committees within this Planning Cluster

UUFCC Board

Long Range Planning

Nominations

Working Group on Organizational Structure

Current Contact

Arian Zarkower and Bob Newnham

John Schmidt

Laura Brown

John Schmidt

Goals for the Next Five Years

1. Develop and maintain a meeting protocol with which to conduct Board business in an effective and timely manner
2. Implement a new organizational structure that encourages participation by many friends and members of the UUFCC, providing an opportunity for community growth
3. Develop, encourage, and nominate capable leaders to UUFCC leadership positions
4. Establish a Volunteer Coordination Committee that will develop and implement a sustained volunteer coordination effort
5. Develop a Board and UUFCC events calendar
6. Develop a Long Range Plan for the UUFCC that will be conducive to annual updates
7. Maintain fiscal responsibility; develop transparent fiscal procedures that encourage responsibility and independence of individuals and groups within the UUFCC
8. Develop a fiscally responsible solution to building space issues; identify potential solutions and assess financial resources to achieve those solutions
9. Establish a year-round Stewardship Committee
10. Establish a year-round Finance Committee

Objectives

1. Maintain a Board environment that is conducive to individual and group success, avoid overtaxing any one person; and by example and leadership extend the same to the UUFCC community
2. The UUFCC has grown to a community size that no longer effectively operates without a more formal structure within which to convey programmatic objectives and policies. A change in organization structure is necessary
3. Encourage leaders who represent the broad spectrum of individuals from our community, and to provide an opportunity for individual and community growth and success
4. Ensure that important programmatic functions are sustained, matching individual talents and interests and skills with committee assignments
5. Ensure that annual Board and community functions are planned and executed in a timely manner. Ensure that all events convened at the Fellowship Hall are planned and coordinated as seamlessly as possible
6. A Long Range Plan that will provide continuity in leadership at many levels within our community, stability in programmatic functions important to the UUFCC mission, and more effective use of personnel and financial resources

7. Ensure that our community sustains the financial resources required to carry out the UUFCC mission
8. Provide space adequate to the size and type of programmatic functions important to the UUFCC community and its mission
9. Effectively provide the financial resources required for the UUFCC programs
10. Effectively manage the finances of the UUFCC and convey the appropriate financial information to the appropriate committees or individuals responsible for UUFCC programs

Strengths

- Board and committee members within this cluster currently include individuals personally committed to the vision and mission of the UUFCC
- Strong desire among this group to develop an effective organizational structure for the UUFCC
- Balance of individuals with an understanding of UUFCC’s past and newer UUFCC members
- Long Range Planning Committee has been formed and is currently preparing a long range plan

Challenges and Opportunities

- Board micro-manages committees, takes time away from more relevant Board tasks and discourages independent action by committees
- Committees are not effectively functioning
 - Inadequate or redundant communication channels among committees
 - Too many “little” or trivial committees
 - Structure is unclear to committee members
 - Areas of responsibility re unclear and/or overlap
- Need to develop leaders with the appropriate skills to effectively lead our organization
- Develop self-managing volunteer network to sustain programs
- Develop a more effective coordination among Board and Fellowship activities

Resources

- The Fellowship Hall provides the physical space in which to regularly conduct meetings and to conduct the activities required to achieve the Goals described in this document.
- The annual budget of the UUFCC.
- The UUA and Joseph Priestly District resources. Books, tapes, and videos in the UUFCC Library.
- Alban Institute consultant and report (Appendix I).
- Professional staff that includes full time minister and director of lifespan religious education, a ¼ time music director, ¾ time office administrator, and part time (5 hr per week) Financial Secretary.
- Dedicated members who are interested in fulfilling the UUFCC mission.

Timeline / Plan

<u>Date</u>	<u>Goal</u>	<u>Milestone or achievable goal: Responsible person or group</u>
Monthly	1	Board agenda includes those items related to UUFCC policy and organization, and excludes programmatic functions and decisions that are under the purview of a standing committee. President and Vice

		President
May 2006	2	Tentative recommendation on governance structure included in the Long Range Plan. Long Range Planning (LRP) Committee
May 2006	2	Governance structure proposal to Board and recommendation for initial steps. LRP Committee
November 2006	2	Present new governance structure to the congregation. LRP Committee and Working Group on Organizational Structure (WGOS)
May 2007	2	By-Laws changes reflecting new governance structure voted on by the congregation. LRP, WGOS, and Board
Annually	3	Consider, propose, and implement fiscally sound methods of training UUFCC leaders. Examples of items to consider: 1) send two people to Unilead and / or one or two people to UUA and Joseph Priestly District leadership workshops; 2) organize in-house leadership workshops (bring in guest speaker); and / or 3) encourage sharing and discussion by members that attend GA. Board and Nominations Committee
Annually	3	Maintain a list of members who are potential leaders. Provide and encourage individuals on this list to attend leadership workshops. Volunteer Coordination Committee
March 2006	4	Present to the Board a preliminary plan for Membership Coordination. Working Group on Volunteer Coordination (WGVC)
June 2006	4	A Volunteer Coordination Committee will be operational. WGVC
2006 - 2007	4	Refine “job roles and descriptions” data base, “people and skills bank” data base, and “volunteer coordination policy and procedures.” Volunteer Coordination Committee, WGVC, and UUFCC Staff
February 2006	5	Provide a recommendation to the Board for a web-based event calendar. Working Group on Board and Event Calendar (WGBEC) and Technology Committee
February 2006	5	Solicit dates for annual events from all committees. Board Trustees, liaisons to committees
Annually	5	Board calendar will be maintained and updated continually. Board President and Executive Committee
Annually and continually	5	Event dates for the coming year will be solicited and obtained from committees each summer (July – August). Board Trustees, liaisons to committees
March 2006	6	Present a LRP to the Board for approval prior to May congregational meeting. LRP Committee
May 2006	6	Present a LRP to the UUFCC congregation. Board and LRP Committee
Annually	6	Committee clusters requested to update individual LRP by December. LRP Committee and Board Trustees, liaisons
Annually	6	Board reviews and updates UUFCC LRP at January Board meeting. Board and LRP Committee
Twice Annually	7	Present annual budget to the Board in August and February. Finance Committee and Treasurer

Annually	7	Propose a budget for the subsequent fiscal year, present to the Board and Stewardship Committee in January (or February). Finance Committee and Treasurer
September 2006	7	Committee involvement in budget preparation. Finance Committee and Treasurer
September 2007	7	Begin to create a program-based budget. Finance Committee and Treasurer
September 2010	7	Begin to create a mission-based budget. Finance Committee and Treasurer
February 2006	8	“Building/Space Assessments” committee in place. President and Vice president
June 2006	8	Proposal to the Board for meeting current and planned space needs. Building/Space Assessments Committee
October 2006	8	Conduct a special campaign to retire current mortgage (currently \$36,000). Finance and Stewardship Committees
May 2007	8	Solicit / hire UUA expertise in assessing capital campaign potential to raise sufficient monies to meet building expansion needs. Building/Space Assessments Committee and Board
January 2006	7&9	Stewardship Committee in place. President and Vice president
January 2006	7&10	Finance Committee in place. President and Vice president

Recorder of this document: _____John Schmidt_____ Date: __12/15/2005__

LRP Cluster Convener: _____John Schmidt_____ Date: __12/15/2005__

UUFCC Board Liaison: _____John Schmidt _____ Date: __12/15/2005__

UUFCC President: __Arian Zarkower & Bob Newnham_____ Date: __04/15/2006__

Appendix I: Alban Institute Report



Recommendations and Rationale Presented to the Board of Directors Unitarian-Universalist Fellowship of Centre County State College, PA

***Rev. Susan Richey Nienaber,
Senior Consultant
August 3, 2005***

Preface

This report is intended to be *descriptive* rather than *evaluative*. Descriptive comments focus on the “who, what, where and when” of circumstances and situations. Evaluative comments focus on the “who and why” with liberal, personal interpretations. My goal in writing a document which is descriptive is to avoid the pitfalls of passing judgment, assigning blame or choosing between winners and losers. In conflicted situations, there is often an abundance of evaluative talk which tends to escalate emotions and keep the system in a reactive state.

I understand my role as a consultant to be multi-faceted. I provide information intended to be perspective-shifting (enlarging ways of thinking or helping narrow the focus to gain clarity), make suggestions and recommendations, evaluate process and procedures, facilitate dialogue, mediate and provide training and education. Even though there is a place for legal methods and techniques in resolving congregational conflict, I do not see my role as a judge or arbitrator in terms of deciding who’s right or wrong. I am also aware that I am an outsider in the system and while I have a large amount of information, I remain an outsider and therefore, limited in my understandings.

In addition to learning about the facts and the chronology of events, I primarily listen for the varying perceptions and meanings rather than trying to look for “the truth.” In reality, we all suffer from believing that our perception of a given situation is “the truth.” It is part of the truth but managing conflict well is sometimes just as much about respecting and addressing perceptions as it is about “getting to the truth.” This is why I do not let people in the small groups get into a debate about whose version of the “truth” is “right” or “correct.”

I. Initial Data-Gathering Visit

A major part of the initial stage of assessment is observing and noting how the first visit goes. I pay close attention to who was selected to coordinate my visit, whether or not this is a representative group, how information is shared with the fellowship about my up-coming visit as well as the logistics of coordinating the individual and small group interviews.

I also pay attention to the kinds of information I begin receiving in the mail beyond the official documents which I request. This often gives me a fairly good idea of the level of conflict in the church prior to my arrival.

Small group interviews were conducted the weekend of June 17, 2005. Many members of the fellowship participated in providing information. Relevant documentation was also provided prior to and during the visit.

II. Current Cultural Realities Impacting All Mainline Congregations

a. Living in a Divergent vs. Convergent Culture

In the 1940s-1950s American cultural values and mainline religious values were more similar than what we are experiencing today. Reggie McNeal writes: "The American culture no longer props up the church the way it (once) did, no longer automatically accepts the church as a player at the table in public life, and can be downright hostile to the church's presence. The collapse involves the realization that values of mainline religion no longer dominate the way Americans believe or behave." (The Future Present-Jossey-Bass p. 5)

We see the same thing happening in families as the culture has become more diverse. One of my professors from the U of MN believes that, for the first time in euro-American history, we do not have a cultural norm for what a family "should" be.

One other notable change is the gap in attitudes and practices between generations. According to Anthony Healy (The Postindustrial Promise: Vital Religious Community in the 21st Century-Alban), the biggest gap in religious attitudes and practices is "largely between the group of people born in the two decades after 1945 (Baby Boomers) and the group born in the decades before World War II." Interestingly, according to the research of Carroll and Roof from Duke University, "unlike the wide divide in attitudes and practices they and many others have found between Boomers and GI Generation (aka pre-Boomers), the division between Boomers and GenXers is narrow." (p. 14)

Resource: *Living Into the New World: How Cultural Trends Affect Your Congregation* by Gil Rendle (Alban video)

b. Increased Demands for Corporate Responsibility and Transparency

I believe that, beginning with Watergate and Richard Nixon, media attention in such cases as Enron, Martha Stewart and the Roman Catholic Church has led to a low tolerance for organizational “indiscretion.” Our faith in authority figures to do the right thing has greatly diminished and there is more suspicion than ever before of those in positions of leadership. Clergy, for example, no longer enjoy top billing on the list of professionals that people first turn to for help. Sadly, I’ve spoken with several Catholic priests who tell the same story of being in a public place and observing parents pulling their children close when encountering these priests wearing their clerical collars.

c. Challenges Facing Established Churches

According to Gary McIntosh, who specializes in congregational growth and development, the priority for churches in their earliest years of existence is creating growth. They do this through “finding people, keeping people and celebrating with people.” The priority for established churches in their later years tends to be “educating people, overseeing people (through committees and structures) and caring for people.”

We are very clear at Alban that those churches with 50-300 year histories that are only “educating, overseeing and caring for people” are creating a downward trend in their church and will eventually cease to exist. This might take 20, 50 or more years but these kinds of churches are inherently creating a system of decline. Those that practice passive evangelism are not doing as well in terms of vitality as those who are actively engaged in evangelism.

Resources: *The Future Present* by Reggie McNeal (Jossey-Bass) and *The Practicing Congregation* by Diana Butler Bass (Alban)

d. The Lack of a Uniform Standard of Professional Practice for Clergy and Paid Lay Staff

One of my special interests at Alban is in developing an understanding of the need for a uniform standard of ethical practice for clergy and other church employees. It is widely accepted in our mainline denominations that physical and sexual abuse and harassment by clergy as well as other gross abuses is unlawful and unacceptable. But the spectrum of professional, ethical behavior though is much larger and includes areas such as: accepting gifts, the use of the pulpit and developing friendships with members of the congregation. Whenever the needs of the ministry professional become primary and there is even the most subtle hint of a secret, an ethical line has been crossed which the professional must take responsibility to correct. Seminaries and denominations have traditionally not always done an adequate job of educating professionals on the more subtle end of the boundary spectrum. This is beginning to improve. The UU denomination is one that has been conscientious about this topic

Furthermore, I know that professional mistakes on the subtle end of the spectrum are common and that most of us have made/continue to make those mistakes in our professional lives. I also know that even subtle mistakes tend to generate large amounts

of emotional pain as well as feelings of betrayal and confusion for our parishioners. Given our demands for perfection as professionals and the shame we feel when we make these kinds of mistakes, we are at risk for withdrawing instead of taking responsibility and repairing the violation.

Resource: *Boundary Issues for Clergy and Spiritual Teachers* (Faith Trust Institute video) and *At Personal Risk: Boundary Violations in Professional-Client Relationships* by Marilyn Peterson (W.W. Norton)

III. The Leadership of the Board

a. Organizational Structure Issues

It is not unusual in UU churches to find a more “flat” or horizontal organizational structure. This has to do with traditional UU values of strong lay leadership and some sense of anti-institutionalism. Unfortunately, many UU fellowships experience a sense of organizational chaos as a result. Here at UUFCC I heard concerns about disorganization, micro-managing by the Board and a feeling that people move in many different directions at once. I also heard concerns about a lack of accountability and clarity in terms of who has jurisdiction over what areas. I recommend that the board simplify the current organization structure in keeping with the size of the fellowship. This could mean decreasing the number of committees and/or reorganizing some committees to include additional functions. For example, the role of Fellowship Relations could be expanded to include: new member assimilation, organizing fun/fellowship activities, etc. The problem with a narrow focus here is that FR may be seen as “the behavior police.” The fact that UUFCC has an FR committee is wonderful as that is frequently one of my recommendations in other churches.

b. Decision-Making

It is tempting for Boards to get themselves into the position of being managers instead of leaders. The leadership of a governing board frequently needs to become more narrowly focused on casting the strategic vision and direction, setting larger priorities and initiatives and dealing with by-laws and other procedures in order to maintain continuity with the larger mission and purpose. The management question is ‘are we doing it right?’ and the leadership question is ‘are we doing right things?’ UUFCC has grown to the point where there are staff positions and committees to do the work of management. The board needs to lead in order to provide that unifying vision, purpose and direction so that you don’t have people moving in multiple directions at the same time. There is the need for more work in strategic and long-range planning with better communication to and buy-in from the members of the fellowship as a whole. There is also the need for leadership development training prior to folks serving on committees and on the board.

I recommend the continued use of process observers at board and committee meetings. This is a way to get feedback and to continually learn and grow as a spiritual organization.

c. Welcoming and Incorporating New Members

I heard comments about how the fellowship has difficulty retaining and incorporating new members. I heard stories about coffee time being more of a place to conduct business rather than meet and greet visitors and stories about new members getting assignments which feel overwhelming only to find out later that “it was not done right.” A few are concerned about the fellowship behaving as a social club without being constantly grounded in its spiritual focus.

It might be helpful to consider the use of a volunteer coordinator.

d. Committee Structures

In addition to the “flat” organizational structure, I noted that there is a history of lay leaders wearing multiple “hats” – being on several committees or the board all at the same time. If UUFCC chooses to address its flat organizational structure by reducing and streamlining the number of committees, this will discourage the overlap of leaders on committees. It will also be important to have policies directed at limiting dual roles.

I am uncertain about the history of the use of co-chairs for committees. I suspect that there were very good reasons for encouraging the use of co-chairs but in the current situation, I believe this is contributing to some of the organizational chaos and so I recommend that that practice be re-evaluated.

e. Managing Personnel Issues

It would be helpful to create a flow chart describing what steps will be taken when a serious complaint is brought against a member of the staff/clergy.

f. Boundaries

Due to recent issues regarding boundaries, I recommend that the leadership begin by receiving additional training in dealing with allegations of unprofessional behavior. The fellowship, as a whole, needs more education. A safe sanctuary policy needs to be in place which includes the provision of an advocate for injured parties. Restorative justice mediation is also an option to help facilitate healing when both parties are ready. All of these activities will require good communication to and buy-in from the members of the fellowship.

IV. The Fellowship's Strengths and Ways of Handling Differences

Those who participated in the information gathering process described the fellowship in some very interesting ways. I heard that this is an action-oriented and committed group of people who share the same core values. I heard that the people in general and their gifts and resources are highly appreciated. I heard you say that you are a group of participants without a lot of spectators.

I also heard that there is a history of recurring patterns of conflict here at UUFCC. I heard comments about high levels of personal criticism, reactivity and oversensitivity. Many expressed concerns about having witnessed members leaving due to hurt and conflict. I heard about a high degree of burn-out of active members, a level of suspiciousness of other's motive and intentions. Some report of lack of communication from leaders to the fellowship as a whole and perhaps a level of discomfort talking about money.

All of this would suggest the need for conflict management training for the fellowship and its leaders. This can happen in a variety of ways through Sunday morning talks and education events, small groups who commit to adopting a book recommended by the staff, board or FR committee. It would also be helpful to create some additional behavioral guidelines for fellowship members.

I would also recommend that UUFCC become educated in the use of dialogue methods and techniques for large group conversations and as a tool for connecting and re-establishing trust.

* * * *

I have appreciated the opportunity to work with this fellowship. My thoughts are with you and my door is always open to you as you seek to implement important changes for the health of your church.

Susan Nienaber
Senior Consultant
The Alban Institute
13040 Bluebird St. NW
Coon Rapids, MN 55448
763-913-9505
Fax-763-757-3999

Resources for Organizational Structure and Conflict

- *Building Effective Boards for Religious Organizations: A Handbook for Trustees, Presidents, and Church Leaders* edited by Thomas P. Holland and David C. Hester (Jossey-Bass) <http://www.amazon.com/exec/obidos/tg/detail/-/0787945633/103-6807316-8177449?v=glance>
- *Creating Caring & Capable Boards: Reclaiming the Passion for Active Trusteeship* by Katherine Tyler Scott (Jossey-Bass) http://www.amazon.com/exec/obidos/tg/detail/-/0787942936/qid=1116886236/sr=1-2/ref=sr_1_2/103-6807316-8177449?v=glance&s=books
- *Transforming Church Boards into Communities of Spiritual Leaders* by Charles M. Olsen (Alban Institute) <http://www.alban.org/BookDetails.asp?ID=913>
- “Hear every voice” model of decision making that emphasizes inclusion and consensus building
- *Take the Next Step: Leading Lasting Change in the Church* by Lovett H. Weems (Abingdon Press) http://www.amazon.com/exec/obidos/ASIN/0687020840/qid=1116887736/sr=2-1/ref=pd_bbs_b_2_1/103-6807316-8177449
- *Congregations* magazine, Spring 2005 “Emerging Models of Governance” (Alban Institute)
- *Behavioral Covenants in Congregations* by Gil Rendle (Alban Institute)
- *Healthy Congregations* by Peter Steinke (Alban Institute)
- *Congregational Fitness* by Denise Goodman (Alban Institute)
- *Never Call Them Jerks: Healthy Responses to Difficult Behaviors* by Arthur Paul Boers (Alban Institute)