

Follen Church Society 2009 Long Term Plan

Vision

**We are a welcoming Unitarian Universalist congregation.
Nourished by our community, we grow spiritually and embrace the world.**

Mission

Reach out and welcome all, experiencing difference as opportunity;

Pursue our spiritual paths independently and in fellowship, sharing our quest for understanding, wonder, and meaning;

Commit ourselves to justice, service, and increased harmony with nature through thoughtful, compassionate, and courageous action;

Give generously of our time, talents and resources at Follen and beyond, energized by our contributions and grateful for those of others.

I. Summary

Over the next five years, Follen Church will mark two significant milestones: Reverend Lucinda Duncan's retirement after 18 years of inspirational and energetic leadership at Follen, and our building's 175th anniversary. As a congregation we will thus be celebrating our history while planning our future. This Long Term Plan is a review of our recent past, a guide for future action, and a testament to our values and concerns.

This plan focuses on areas in our community we wish to improve. It is crucial, however, to keep in mind that we are a strong, vibrant spiritual community today. Walking into the building on Sunday mornings one feels a sense of energy and vibrancy. Walking through the building on weekday evenings one sees committees working with purpose and commitment. Weekdays our staff supports our work with dedication and good cheer. Our lay leaders are strong, wise and devoted. We have outstanding Religious Education and Music programs. Our worship services are inspirational. In the past few years our social justice initiatives have seen increased energy and focus. We offer a solid core of programs and activities through which people can connect to our community and deepen their connections with each other. We have recently enlarged our endowment and increased average pledge levels. The objectives we accomplished as a result of our 2000 Strategic Plan have us in a solid position in regard to our operations, organization and building. Follen Church in 2009 is solidly in a position to move forward by “Becoming Bold”.

At the fall 2008 “Becoming Bold” retreat, participants clearly expressed a desire for broader inclusion and deeper connection. We want there to be space and safety for each person to come to Follen as a whole person—without feeling the need to hide any part of her or himself. Another clear message was the desire for more challenging and more diverse spiritual opportunities through worship, adult programs, music and social justice. Social justice initiatives were noted as a growing strength of Follen church and one that deserved more of our time, focus and financial support. Finally, stewardship wound its way through every conversation with the desire for more clarity, more generosity and more stability short and long term. We want both to provide fair compensation for our staff and Ministers, and to expand our staff to include a Membership Coordinator.

To capture that in our Vision we used the words, *welcome*, *nourish* and *embrace* to express our desire to open up as a congregation, stretch, change behaviors, and take risks that allow us to reach out to each other and to our greater community.

But a Vision is no more than words without a plan of action. In consultation with Follen's Action Teams, committees, staff and congregation, the Long Term Planning Committee discerned the following major initiatives – our shared Mission - that will lead us to a realization of our Vision:

These goals will be realized through four major Mission areas:

- Creating Broader and Deeper Community
- Enriching Worship and Spiritual Life
- Pursuing Justice, Service, Harmony with Nature
- Building Comprehensive Stewardship

Creating Broader and Deeper Community

We will realize more meaningful involvement of current members, more purposeful welcome and integration of new members, deliberate integration of adult and youth activities, and pastoral care for a diverse population. We will commit ourselves to reach out in trust, taking risks and leaps of faith to make the deep connections that give meaning to our lives.

- Improve our welcome of visitors, integration of newcomers, retention of members, development of leaders, and management of volunteers, and plan for hiring a Membership Coordinator.
- Publicize Follen's achievements of its Vision and Mission
- Ensure that Follen's buildings are inviting spaces that function well as public and private spaces for our community
- Raise awareness of and reflect on Follen's culture, to better identify values and the messages we communicate to visitors and the community, and to become open to differences among people.
- Identify local communities and organizations to work with and to welcome.

Enriching Worship and Spiritual Life

We will promote variety in our worship, spiritual practices, and programs.

- Expand programs that foster individual and community spiritual deepening throughout the lifespan
- Encourage, teach, and support adult and youth congregational understanding of and involvement in worship services
- Explore the capacity of the arts to foster spiritual enrichment
- Support our internal plurality of religious and spiritual perspectives

Pursuing Justice, Service and Increased Harmony with Nature

We will review and reaffirm our current social justice initiatives, take bolder steps toward increased environmental stewardship, and pursue opportunities for supportive action in the community and the world.

- Develop a community ethos of active participation in social justice
- Deepen our understanding of differences among people and build alliances across differences
- Raise consciousness at Follen and in the larger community of Follen's social justice efforts
- Reduce Follen's environmental footprint
- Become more involved in UUA Social Justice Initiatives

Building Comprehensive Stewardship

We will maintain our historic buildings and continue long-term financial planning

- Explore new sources of income with both short term and long term impacts
- Raise level of pledging to reflect cost of current needs and new initiatives
- Expand funding for social justice initiatives, and increase awareness of non-budget contributions
- Prepare for financial impact of search for and installation of new minister
- Review current space use, and plan for future needs
- Enlarge the endowment

II. Introduction

A. Overview of 2000 Strategic Plan and progress on major strategies

The 2000 Strategic Plan was developed in a series of congregational meetings and leadership discussions in the winter and spring of 2000. The plan was endorsed by the Annual Meeting that year and included operational strategies, organizational strategies, and building strategies. Much progress has been made in all areas.

In the operational area we have maintained areas of success, e.g., music and religious education. We strengthened the front office by adding a full-time administrator with greater expertise and clarified responsibilities. The stronger front office has relieved some of the pressure on lay leaders, but there is still work to be done on creating lay leader job descriptions and improving succession structures.

Key organizational strategies have been realized. We formed a Membership Committee to better welcome and integrate members into the church and to help us keep track of who our members are and what they are doing. We recently hired a part time Membership Coordinator to help with this. We formed a Canvass Committee to strengthen the annual pledge drive and to work with the Trustees and Finance Committee to ensure our long-term financial well being. We went beyond the goal of refocusing the Parish Council more toward long-range stewardship and policy issues and Advisory Committee more toward operations and programming. Instead, we rewrote our bylaws and implemented a new governance structure that is more decentralized, and which separates policy/planning and operational responsibilities, allowing us to act more quickly.

Finally, we followed through on building strategies with a \$600,000 capital campaign that retired our \$140,000 mortgage and renovated the parsonage, kitchen, upstairs offices, classrooms under the sanctuary, chancel stage, and the community center. We also painted the exterior and re-roofed the sanctuary. Work yet to be done is to renovate the bathrooms and the vestibule.

B. 2009 Strategic Plan

The Follen Parish Board authorized the formation of the Long Term Planning Committee (LTPC) under the terms of the Follen bylaws. The LTPC was chartered to develop a Mission/Vision Statement and a Long Term Plan to be developed and implemented in time for the fiscal year ending June 30, 2009.

The LTPC began meeting in November of 2007. After several meetings, the LTPC decided that a church-wide retreat could assist the LTPC to better assess the priorities of the congregation as a whole. Over the spring and summer of 2008, the LTPC created the agenda and set the date for the retreat. The goal was to create a forum for the views of the congregation to be developed, heard and implemented into the Statement and the Plan.

6/5/2009 Version

The theme for the retreat in September 27, 2008 was “Becoming Bold” and was attended by more than 80 members and friends. The morning session featured a “Mad Libs” exercise to elicit ideas from people in order to assist in the development of the Statement. The mid-morning session involved an improvisatory theater session with True Story Theater to allow for the retreat participants to see and hear some of their fellow congregants' thoughts about Follen. Finally, the afternoon sessions included breakout sessions divided into eight groups:

Crafting Caring Community
Sharing our Space
Lifetime of Learning
Radical Hospitality

Paying our Way
Creativity
Sunday Morning and More
Repairing the World.

During the 2008-2009 church year, we solicited further input from Action Teams, the Program Council, Parish Board, Staff, Nominating Committee and the congregation.

Members of the Long-Term Planning Committee, 2007-2009:

Alex Bromley, Linda Dacey, Alice Dunn, Karen Edmonds, Faith Ferguson, Orian Greene,
Debora Hoard, Brad Howe, Kyle Johnson, Walter Leutz, Meg Muckenhoupt, Harriet Peterson,
Don Snodgrass, Jane Spickett

III. Vision and Mission Statements, accepted by vote of the congregation at Annual Meeting on 5/14/09

Vision

**We are a welcoming Unitarian Universalist congregation.
Nourished by our community, we grow spiritually and embrace the world.**

Mission

Reach out and welcome all, experiencing difference as opportunity;

Pursue our spiritual paths independently and in fellowship, sharing our quest for understanding, wonder, and meaning;

Commit ourselves to justice, service, and increased harmony with nature through thoughtful, compassionate, and courageous action;

Give generously of our time, talents and resources at Follen and beyond, energized by our contributions and grateful for those of others

IV. Five Year Strategic Plan

Over the next five years, the transition to a new minister will become a major factor in Follen Church life. Our minister, Lucinda Duncan, has indicated that she plans to retire at the end of the 2010-2011 church year. Following her retirement, Follen will have an interim minister for at least one and possibly for two years.

At the end of this interim period, we would like to engage a minister who can lead us forward toward our vision. To attract this minister, we must both maintain our vibrant, dynamic community, and marshal the financial resources not only to offer a suitable salary consistent with Fair Compensation guidelines, but also to provide the minister with sufficient support staff.

To achieve these goals, we recommend adding a Membership Coordinator to Follen's staff. The Coordinator will help Follen to achieve multiple goals, including reaching out to the wider community, integrating newcomers into Follen, maintaining ties with members in transition, strengthening intergenerational activities, and more. The old Membership Committee and new Community and Hospitality Action Team (CHAT) have worked towards these goals, but their lay-led efforts need to be significantly strengthened and expanded by paid staff.

We are committed to providing all staff with Fair Compensation according to the Unitarian Universalist Association guidelines.

Implementation:

The following document provides more details on these initiatives and highlights the steps that may be taken to realize these broad goals. We acknowledge that any plan is a work in progress and hope the congregation will make changes as needed through the 5 years of this initiative. We recommend the Parish Board maintain oversight and obtain updates on progress on implementation of these initiatives. It is the responsibility of the Program Council and the Action Teams to base their Annual Plans on achieving these goals.

No Action Team or committee is responsible for any one mission initiative. These are shared goals and some will thread through many Action Teams. The purpose of this plan is to provide a blueprint that each congregant, each Action Team and our staff will use as a guide to develop their programs over the next years in an effort to reach our shared Vision.

A. Creating Broader and Deeper Community

1. Improve our welcome of visitors, integration of newcomers, retention of members, development of leaders, and management of volunteers, and plan for hiring a Membership Coordinator

Reasons for this Initiative:

We know that in many ways we are a warm and welcoming community. We want to enhance that climate of inclusion and connection so that visitors consistently receive a warm welcome; newcomers find it easier to connect with our programs; members do not drift away, especially during and after life transitions; leaders do not burnout because new leadership is not developed; and friends and members are consistently invited to get involved in activities that match their skills and interests.

Enacting this Initiative:

- As a church, we will work to create a culture of welcoming as a spiritual practice, taking care to reach out to and connect with all members at all life stages.

- Several Action Teams stated that their jobs would be easier if there were a point-person to keep track of visitors/newcomers/friends/members. We will hire a Membership Coordinator to support this work. This hiring requires creating a budget for this expense, recruiting a hiring and supervisory committee, and creating a job description with specific duties and performance reviews. The following tasks may naturally fall to the Membership Coordinator:
 - Keep statistics of how many people are visiting and joining Follen, and make better use of our membership database by consistently recording information from every Action Team about people's participation, thereby ensuring that we have up-to-date information about all newcomers, friends and members.
 - Discover Follen members' and visitors' talents, skills, and passions, and connect them with Action Teams and programs in the church where their abilities and enthusiasm will be appreciated.

- Observe places and programs which do not attract certain segments of Follen's community, and explore ways to make them more accessible and attractive to everyone.

- Provide pastoral care to newcomers in need.

- Develop and implement a comprehensive plan for leadership development.

Expected results:

- The rate of visitors choosing to become pledging members should increase over the course of five years.
- The number of Follen members from all walks of life who participate in Social Justice, Adult Programs, and other Follen programs will increase.
- Congregants will not "fall away" at life transitions: when their children graduate from high school; when they themselves leave elementary school, middle school, high school, college, or professional school; transitions in relationships, personal finances, starting a new job, etc.
- Congregants will give of their time and talents with more joy because they will be matched to positions that fulfill them and do not burn them out.

2. Make Follen's achievements of its Vision and Mission continually visible to the greater community

A): Via an easily updated, more accessible and current web site that reflects who we are and where we are going as a congregation

Reasons for this Initiative:

Several action teams observed that the current web site could be a much more effective tool for communication by action teams and the church at large. Also, our web site is the first contact many visitors have with Follen. It needs to represent our best efforts and intentions.

Enacting this Initiative:

- We need to draw on professional web expertise to overhaul the web site.
- Follen should activate the plan and implementation and maintenance strategy Denis Haskin and Janet Parsons have developed for the church's electronic communications.
- We will need to research an appropriate budget for this expense.
- We will also need to conduct a survey of both congregation and visitors to find out what they like on the current web site, what they do not like, and what new features would be useful.

Expected results:

- Action teams and other church groups would update their pages more often
- Congregation members and the wider community would be better informed and connected.

B): By publicizing Follen initiatives in the local newspaper and other media

Reasons for this Initiative:

Many of Follen's achievements and initiatives are not well publicized in our local community. We are losing the opportunity to recruit members and communicate with people who share Follen's values.

Enacting this Initiative:

- We need to support the Communications Committee, or Volunteer Coordinator, as well as Action Team liaisons, to gather and distribute information on Follen's activities and schedule by developing a practice of regular communication about upcoming and ongoing activities. This committee will not only record Follen activities, but also communicate regularly with area newsletter editors, bloggers, and others to confirm deadlines, and consult about future editorial needs that Follen could fulfill.

Expected results:

- More articles in the Lexington Minuteman
- More traffic on the web site
- An increasing number of visitors who ask about Follen's public initiatives

Creating Broader and Deeper Community (cont.)

3. Ensure that Follen's buildings are inviting spaces that function well as public and private spaces for our community

A): By improving Follen's physical entrance to the Community Center

Reasons for this Initiative:

The Community Center Entrance needs renovation. It floods regularly and needs improved pathways, lighting, and signage.

Enacting this Initiative:

- Draw on architectural and civil engineering expertise to design and carry out a plan for improving the entrance.

Expected results:

- Follen becomes more attractive to rental clients
- Visitors and members will see Follen as a more welcoming, accessible place.

B): By adding audio/visual capacity throughout the buildings.

Reasons for this Initiative:

We would like to evaluate and improve the adaptive listing devices and overall audio quality in the sanctuary, provide A/V capacity in all classrooms and meeting rooms.

Enacting this Initiative:

- Draw on architectural and A/V expertise to evaluate our current systems and make plans to improve our A/V capacity.

Expected results:

- Follen becomes more attractive to rental clients
- Follen more accessible to people with hearing and sight impairments
- Recording in the Sanctuary becomes easier, and produces higher quality results
- Film screenings and visual presentations become available to Follenites and renters

4. Raise awareness of and reflect on Follen's culture, to better identify values and the messages we communicate to visitors and the community, and to become open to differences among people

Reasons for this Initiative:

Part of our mission is to “Reach out and welcome all, experiencing difference as opportunity;”
We will benefit from greater understanding of our differences and similarities

Enacting this Initiative:

- Follen should offer a variety of reflective groups on cultural differences and values, for example: discussions of ethnic, class and religious identities; adult Our Whole Lives classes.

Expected results:

- Deeper connections within Follen
- Visitors and members will experience Follen as a more welcoming, accessible place
- More diverse membership

5. Identify local communities and organizations to work with and to welcome

Reasons for this Initiative:

Part of our mission is to “Reach out and welcome all, experiencing difference as opportunity.”
We need to learn who our neighbors are for mutual enrichment.

Enacting this Initiative:

- We will research local community groups, listservs, social networking sites, and other organizations, sharing this information at Program Council so that Action Teams can begin to invite and interact with community groups.
- Provide information about Follen's resources and activities
- Cooperate with local groups on projects of mutual interest, such as the Shield of Loving Kindness
- Invite members of the local community to our church

Expected results:

- More diverse membership
- Improved connection to and awareness of our diverse local community

B. *Enriching Worship and Spiritual Life*

1. Expand programs that foster individual and community spiritual deepening throughout the lifespan

Reasons for this Initiative:

While Follen devotes considerable resources to Sunday worship and children's religious education, there are few programs to encourage spiritual growth of youth and adults in other venues. Many congregants could benefit from diverse approaches to spiritual awareness such as study and prayer groups, small-group worship, ritual groups, or spiritual retreat.

Enacting this Initiative:

- Expanding lifelong programs for spiritual development is a matter of both conception and communication: conception of programs to satisfy interests expressed by adult and multigenerational groups, and communication to recruit leaders and invite people to come. A Membership/Volunteer coordinator (see below) could consult staff, lay leaders, and congregants to assess needs, locate leaders, and conduct the requisite follow up.
- The Religious Education Action Team (REAT) and the Worship and Music Action Team (WMAT), along with the Minister and appropriate program staff, should assess and develop opportunities to deepen spiritual insight, and to support teacher education.
- Follen should hold regular spiritual retreats to allow time and space to focus on individual and group spiritual growth. Clergy and lay leaders may collaborate to create these retreats.

Expected results:

- Greater satisfaction with Follen's programs
- More diverse membership responding to a greater variety of spiritual experience
- Congregants both in better touch with their own beliefs and spirituality and in better communication with other members about theirs
- A deepening understanding of Unitarian Universalism
- Teachers who feel confident in responding to children's religious and spiritual questions
- More opportunities for contemplative, participatory spiritual work

2. Encourage, teach, and support adult and youth congregational understanding of and involvement in worship services

Reasons for this Initiative:

Leading worship is an important spiritual experience and many of our lay-led services have had a profound impact on our community. We wish to continue to find the voices that express the diversity within our congregation, and to give these congregants the support to conduct well-developed, meaningful worship services.

Enacting this Initiative:

- In partnership with the minister, the REAT and WMAT will continue to identify these voices, explore areas of need, and help congregants develop their own skills for leading worship.

Expected results:

The quality of lay-led services will be a richer experience for both participants and congregants.

Participants will better understand how to construct a meaningful worship service.

Congregants will understand that there is a structured approach to and support for creating worship services, and feel more welcome and interested in leading services

Follen may find sufficient lay worship leaders to hold some summer services

3. Explore the capacity of the arts to foster spiritual enrichment

Reasons for this initiative:

Follen's vibrant music program enlivens and deepens our worship. We come to the spirit through many different experiences – not just through listening to inspiring words and music, but also by seeing and touching, even enacting religious feelings through our bodies' movements. Follenites already appreciate the visual field of flowers at the close of the Flower Communion, holding hands at the Family Service benedictions, seeing the Faith Quilt hanging in the Sanctuary, feeling the vibrations at the monthly Drum Circle, carving and displaying jack o'lanterns on the Follen steps. We wish to speak to the multidimensionality of spiritual experience.

By providing opportunities to explore a variety of modes of experience and worship, we reach more congregants, and ask and answer different questions than we can approach through words alone.

Enacting this initiative:

- We should find Follen congregants who could share their skills in dance, the visual arts, drama, and other arts and weave them into the life of the church. They may share their talents in Sunday worship, RE classes, weekday classes, small-group worships, collaborative art work, and other venues.
- In consultation with Follen's expert music staff, help the congregation to become more informed about how music can contribute to our spiritual growth, to understand the choices underlying Follen's musical offerings, and to explore the spiritual role of music beyond Sunday services.

Expected results:

- More diverse membership responding to the many possibilities of human experience in worship

4. Support our internal plurality of religious and spiritual perspectives

Reasons for this Initiative:

We wish to be intentional about teaching and modeling the internal diversity of a healthy, worshipping Unitarian Universalist community.

Enacting this Initiative:

- Speak to our responsibility as part of the wider Unitarian Universalist liberal religious movement.
- Increase understanding of how to speak about and live the UU Purpose and Principles
- Support specific faith focus groups within our congregation (e.g. Jewish Heritage Discussion Group, UUs Approaching Jesus, Buddhism, Humanism, Earth-centered traditions, etc)
- Offer regular instruction and counseling to teach individuals and extended family members how to re-conceptualize their interfaith diversity.
- Increase our skill in asking good, respectful questions of those among us whose religious, spiritual, or philosophical perspectives are different from our own.
- Welcome and promote the better understanding of, and friendships with, religious individuals or groups from faith traditions outside of Follen.
- Encourage balance, depth, and spiritual authenticity during times of important religious holidays for a range of religions.

Expected results:

- We are enriched by religious diversity both within and beyond our congregation's boundaries.

C. Pursuing Justice, Service and Increased Harmony with Nature

1. Develop a community ethos of active participation in social justice

Reasons for this Initiative:

To live our Unitarian Universalist values means to work toward social justice. Our social justice work has a powerful impact on the lives of individual people. We strive to have this spiritual understanding of our work in the world permeate all we do at Follen.

Enacting this Initiative:

- With the help of the Membership/Volunteer Coordinator, survey the congregation to discover who is participating in social justice initiatives at Follen, and what perceived and actual barriers there are to participation.
- Organize social justice initiatives in ways that will encourage participation by people of diverse backgrounds, physical capacities and ages.
- Make social justice a larger focus in programs for our children and youth, both educational programming and involvement in projects.
- Incorporate social justice topics into worship in ways that address how we grow spiritually through social justice work.

Expected results:

- Greater proportion of the congregation participates in social justice efforts
- Follen community develops a greater sense of investment in the church and its programs
- More diverse membership

2. Deepen our understanding of differences among people and build alliances across differences

Reason for this Initiative:

Our work toward a more just, sustainable and peaceful world is limited by our ability to understand and work with people from different backgrounds and cultures. We need to create congregational and individual connections to more local and global communities to fully embrace the world.

Pursuing Justice, Service and Increased Harmony with Nature (cont.)

Enacting this Initiative:

- Develop relationships similar to that with our Partner Church in other areas of the world, mindful that many residents have deep connections to family members in other countries, especially east Asia.
- Develop relationships with groups within our local communities for the purpose of increasing understanding, such as local cultural groups serving our large East Asian population.
- Continue to include education about other cultures and religions in our Sunday morning Religious Education program for children and develop programs for adults.
- Continue to increase our understanding of and appreciation for differences in gender identity and sexual orientation.
- Have a series of discussions, book groups, and other programs on the class issues within Follen, or local communities, and within the Boston region.
- Seek out opportunities to collaborate with faith communities and other local groups on issues of common concern, accepting differences that might otherwise divide us.

Expected results:

- Greater interconnection within and with wider community.
- More diverse membership

3. Raise consciousness at Follen and in the larger community of Follen's social justice efforts

Reasons for this Initiative:

Follen's social justice initiatives are not broadly known or understood within the congregation or within the wider community.

Enacting this Initiative:

- Keep track of Follen's efforts and contributions by the Social Justice Action Team. These can be communicated to the congregation in a variety of ways: via Sunday worship and announcements, e-mail, our website, presentations at Action Team meetings, "Volunteer Fairs" at coffee hour following worship – but variety and repetition is key.

Expected results:

- Greater proportion of the congregation participates in social justice efforts
- An increasing number of visitors ask about Follen's public initiatives

4. Reduce Follen's environmental footprint

Reasons for this Initiative:

Part of our mission is to "Commit ourselves to justice, service, and increased harmony with nature."

Enacting this Initiative:

- We need to start "greening" our space, carpooling, and other initiatives to save energy, reduce greenhouse gases, and enhance our local ecology.
- The Building and Grounds Action Team and the Social Justice Action Team need to combine efforts with the Membership/Volunteer Coordinator to establish costs and feasibility for greening our buildings, and draw on design and engineering expertise to carry out the plan.

Expected results:

- Follen community develops a greater sense of investment in the church and its programs.
- Follen and the Follen community reduces fossil fuel consumption, making our community healthier and more sustainable over the long term.

5. Become more involved in UUA Social Justice Initiatives

Reasons for this Initiative:

By collaborating with UUA Social Justice Initiatives, we can make our work easier by using their resources and by combining our efforts with the Association have a larger impact in the broader world.

Enacting this Initiative:

- Increase awareness at Follen about social justice initiatives organized by the UUA Washington Office For Advocacy.
- Become more active in the social justice initiatives overseen by the UUA Commission on Social Witness, both by having more input into selecting initiatives and by carrying out recommended study, action and reflection activities.

D. Building Comprehensive Stewardship

1. Explore new sources of income with both short term and long term impacts

Reasons for this Initiative:

- We would like Follen to be financially stable over the long term

Enacting this Initiative:

- Encourage additional sources of funding that don't draw solely from the Follen community through more such activities as the East Village Fair, Concerts for a Cause, Christmas trees, cell tower, and rentals.
- Advertise such activities and convey our message to the larger community.
- Improve our appeal for rentals by making the buildings more attractive and welcoming.
- Hold a special joint annual meeting of the Stewardship and Finance Committees to explore other sources of income.

Expected results:

- Follen's annual income increases.

2. Raise level of pledging to reflect cost of current needs and new initiatives

Reasons for this Initiative:

- Create financially stable organization over the long term, through wider participation in stewardship
- Honor our commitment to Fair Compensation
- Maintain our historic buildings.
- Follen can provide a higher level of service to the congregation through the paid FUUY and Membership Coordinators.

Enacting this Initiative:-

- Continue to develop awareness of best practices in fund raising through appropriate use of congregational and UUA expertise
- Support training opportunities for those involved in stewardship and pledge drives
- Research pledging in comparable churches in our area

Expected results

- Follen's annual income increases
- Follen community develops a greater sense of investment in the church and its programs

3. Expand funding for social justice initiatives, and increase awareness of non-budget contributions.

Though financial planning tends to concentrate on the amount of money pledged, in fact a significant amount of additional money is derived from special collections plate and other donations solicited during the year.

Reason for this Initiative:

- To fund the continuation of the current Social Justice Action Team programs: among them, the major funding for New Orleans relief work, the Partner Church, the Minister's Discretionary Fund and the UU Urban Ministry.
- To have the capacity to develop additional social justice programs as the need arises.

Enacting this Initiative

- Break out sources of total giving to the church, giving the percentages from the plate, special plate collections, designated purpose gifts such as scholarships, bequests
- Acknowledge pro bono time within the congregation

Expected results:

- Greater joy of giving
- Acting on our values

4. Prepare for financial impact of search for and installation of new minister

Reasons for this Initiative:

- Follen's senior minister, Lucinda Duncan, will be retiring in upcoming years.
- Follen needs to be financially competitive in the ministerial search process.
- Ministerial transitions may cause congregational transitions that can impact funding for a few years. We need to provide a cushion for that possibility.

Enacting this Initiative:

- The Financial Action Team and the Ministerial Transition Teams will review costs and report to the congregation.
- Follen needs to explore the possibility of a Human Capital campaign.
- Follen needs to generate a surplus to accumulate an incremental reserve for the transition.

Expected results

Follen hires a talented new minister at a competitive salary.

5. Review current space use, and plan for future needs

Reasons for this Initiative:

- Follen's membership has been growing in recent years. Some church programs—such as the younger religious education classes—are already on the verge of outgrowing their allotted space.
- To provide the congregation and renters with higher quality facilities
- To create new and expanded opportunities for multimedia presentations in the sanctuary, the classrooms, and other spaces.
- We may need to replace and/or provide additional equipment and furnishings in existing spaces.

Enacting this Initiative:

- Buildings and Grounds AT needs to conduct an assessment and review in consultation with all the other Action Teams.
- Religious Education AT has to compile projections on future classroom needs.
- Follen needs to maintain awareness of plans for the Stone Building and continue the ongoing relationship with the Waldorf School

Expected results:

- Follen grows gracefully and continues to adapt a historic building to accommodate modern uses and needs

6. Enlarge the endowment

Reasons for this Initiative:

- Follen should be financially stable over the long term.
- To protect against financial vagaries
- To provide continuing resources
- To strengthen the financial foundation of the church

Enacting this Initiative:

- Minimize withdrawals from the Endowment Fund
- Actively and aggressively pursue bequests
- Explore possibility of Capital Campaign to increase the Endowment
- Encourage unrestricted gifts
- Acknowledge and honor stewardship in all its forms with explicit recognition for service as well as financial donations

Expected results:

This work will strengthen the financial foundations of the church

Building Comprehensive Stewardship (cont.)**Stewardship Considerations**

The initiatives proposed by Long-Term Planning Committee led to the development of a five-year financial projection which was vetted with the Finance and Human Resources Action team (FHRAT). The Long-Term Planning Committee then considered a second five-year scenario which describes the financial feasibility of these recommendations in the context of a more optimistic economic environment.

1. Conservative Projection: The first of these scenarios is a fairly conservative extrapolation of recent trends and current expectations in revenues and expenses, projected from actual results in Fiscal Years 2007 and 2008, as well as from the projected results for FY2009 (July 1, 2008 – June 30, 2009) and the proposed budget for the 2010 fiscal year (July 1, 2009 – June 30, 2010). Revenues for these four years are as follows:

	<u>FY 2007</u>	<u>FY2008</u>	<u>FY2009</u>	<u>FY2010</u>
	(actual)	(actual)	(projected)	(budgeted)
Total Revenue:	\$462,337	\$481,479	\$498,748	\$497,067

In order to provide a balanced budget both FY09 and FY10 revenues were augmented by about \$27-29,000 per year in transfers and surpluses from prior years. In fact, the Church has experienced nearly flat actual revenues for three years ('07-'09) and is expected to do so again in FY10 in the face of a continued unfavorable economic environment. The conservative *projection*, then, anticipates essentially the same revenues in the four succeeding years, FY11 – FY14, as follows:

	<u>FY 2011</u>	<u>FY 2012</u>	<u>FY 2013</u>	<u>FY 2014</u>
Total Revenue:	\$475,333	\$463,686	\$483,707	\$503,300

Key assumptions in this four-year projection are (1.) that in the interest of rebuilding the endowment after the portfolio losses of the past year no monies will be contributed by the endowment to the operations of the Church through FY14; (2.) that in the year of an *interim* ministry (FY12), pledge receipts are likely to decline a bit; (3.) that Nextel will continue to rent space with a 4%/yr. increase in its fee; and (4.) that revenues from the East Village Fair and Christmas Tree Sales will average flat, allowing for one “rain-out” year for each of these funding sources between FY11-14.

During the past few years, our expenses (disbursements) have been climbing at a more rapid rate than our expenses, as indicated by the following:

	<u>FY 2007</u>	<u>FY 2008</u>	<u>FY 2009</u>	<u>FY 2010</u>
Total Expenses:	\$410,767	\$439,349	\$492,469	\$497,063

These increases have resulted from significant enhancements to the staff compensation package (particularly in the benefits area), from addition of a student intern minister, and from major expansion of programs, especially in social justice. The net of these revenues and expenses is as follows:

	<u>FY 2007</u>	<u>FY 2008</u>	<u>FY 2009</u>	<u>FY 2010</u>
	(actual)	(actual)	(projected)	(budgeted)
Operating Surplus:	\$51,570	\$42,130	\$ 6,279	\$ 5

Building Comprehensive Stewardship (cont.)

In considering levels of expenses for coming years in the face of a steady-state revenue forecast, the highest priority was to maintain our competitiveness in compensation, with the result that projected salaries are increased for all full-time and part-time staff by 3% per year from FY11 – FY14. Additionally, the Building Reserve was raised to \$15,000, and \$7,000 was added to the Parish Minister Salary line for FY13 as part of the package for a new minister. All other expenses were level-funded or, in the case of Programs, modestly reduced. This results in a series of significant Deficits in future years:

	<u>FY 2011</u>	<u>FY 2012</u>	<u>FY 2013</u>	<u>FY 2014</u>
Operating Deficit:	(\$28,476)	(\$50,288)	(\$56,233)	(\$51,605)

2. Aspirational Projection: based on a set of “best-case” assumptions which may be quite reasonable should (a.) the economy turn around by early 2010, and (b.) the members of Follen rally to the goals articulated within this plan. This might enable us to make a major effort to increase our pledging by as much as 8% for FY11 (pledging in late winter, 2010) and sustain it with a further 5% increase for FY12. With the prospect of a new minister in FY13, we could project to add members and increase pledges by 10% in both FY13 and FY14.

This greater level of commitment and activity would carry over into other revenue areas, increasing our plate collections, our rental income and affording new revenue sources (to be determined). As well, an improvement in the financial markets might well recover our lost ground in the endowment sufficient to allow a resumption of contributions from the endowment to the operating funds at a level of \$14,000 in each of FY13 and FY14. Arguably, then, the Revenues in future years could be as follows:

	<u>FY 2011</u>	<u>FY 2012</u>	<u>FY 2013</u>	<u>FY 2014</u>
Total Revenue:	\$506,329	\$532,279	\$589,900	\$638,517

Were this to be the case, we would have opportunities for the following enhancements to the budget, proposed in accordance with the priorities of the Long-Term Plan:

1. Funding the position of Membership Coordinator at \$4,500 in FY2011; \$20,000 in FY12; \$30,000 in FY13; and \$40,000 in FY14.
2. Increasing the Salary for the (new) Parish Minister to \$105,000 in FY13 and \$108,150 in FY14.
3. Increasing the Building Reserve to provide for habitability improvements (audio-visual equipment, a renovated side entrance, and going “green”) to \$22,000 in FY13 and \$30,000 in FY14.
4. Restoring programming cuts in Social Justice and Other Programs.

Fulfillment of these aspirations, in financial terms, results in the following operating results:

	<u>FY 2011</u>	<u>FY 2012</u>	<u>FY 2013</u>	<u>FY 2014</u>
Operating Surplus:	\$ 21	\$ 704	\$ 4,095	\$ 18,124

V. Appendix A:

Breakout Group Summaries: summary of notes from the eight break-out groups at the Sept. 2008 **Becoming Bold All-Church Retreat.**

Overall:

We want to be heard, seen, and included.

We want to know ourselves and each other at a deeper spiritual level, both within Follen and in the wider world.

We want to live our values be known as a community that does that.

To that end, there is a call to a planned lifespan program that is strong on individual and community spiritual development, and the kind of structure that fosters connections with others across differences of faith and culture. Our social justice work, within and outside of Follen would be informed by those relationships

We want our building and grounds feel warm, welcoming and hospitable, and allow us to structure community life within it.

In all aspects of our congregational life, we want all to feel like other people care about them, and that the church is built around ensuring that nobody gets left out or left behind.

Crafting Caring Community

Want multiple opportunities to connect, listen, share, and develop intimacy throughout the whole year. Existing groups and new ones need to be welcoming to new people and all ages, with more active outreach and support. There should be advocacy for both visible and invisible differences among us and support for those who need it. We need multiple opportunities for people to connect: multiple venues, structures, forums, channels. This will require innovation and creativity in finding ways to reach each other and learn to listen well, and to share honestly.

Paving our Way

A dual spirit- and practicality-based approach: financial realities at Follen need to be more clear and more easily understood in order for community to step up; have and articulate a clear identity that includes fostering generosity as a spiritual path. Possible uses of the Stone building raised as dreams/ideas.

Creativity and the Arts

Want more opportunities for all the arts for all ages and abilities, and have more art in the buildings with an emphasis on integration of arts into community life, arts and spirituality, arts and multi-aged activities.

Sharing Our Space

We want a welcoming atmosphere, created by more attractive space (indoor and out) and make the space more responsive to community needs, and we want to create a culture of caring for it, from keeping it clean to leaving a legacy.

We need to identify space needs: renovation, care, restoration (vestibule, downstairs bathrooms), relocate driveway to give better/friendlier access, or for example designate space for specific purposes, like RE especially.

Lifetime of learning

We want regular and lifespan RE: a variety of formats including individuals one-on-one with opportunity for short or long commitment; variety in scheduling; connecting people on a personal level; involving all ages, and collaborating with other churches/faith groups. RE needs to be more central at Follen.

Sunday Morning & More

We want small groups for reflection and learning about all aspects of our spiritual journeys: practice, identity, life cycle, ethical and moral issues. As part of a much larger progressive faith movement, we want to expand our spiritual and social justice work as a community and learn with other faith communities.

There is a desire for more variety in worship – e.g. music, other faiths, with more guest speakers/preachers, and involvement of youth in a way that speaks to all.

Radical hospitality and welcoming group

We want to tell/hear our stories with people who share similarities and who have different experiences, both within Follen and the wider community: sharing stories and living our values. We want to let people know who we are, find out who they are, and work with them .Lifespan learning is again emphasized, as is connection with all ages. Music that appeals to a more diverse group of people is suggested.

Repairing the World

We want to have the dialogue skills and experience to make real connection with each other here and in the wider community (locally, in the U.S. and abroad) across difference. These connections are ones of understanding and social justice, and will benefit not just the individuals in relationship, but the communities as we cross borders of geography, social class, and other challenges.