

Follen Church 2015 Long-Term Plan

Approved by Parish Board¹ on April 13, 2015 and by Annual Meeting on May 14, 2015

Follen is poised at a pivotal moment in the remarkable history of our church. We are settling into what we all hope and expect to be the long, transformative ministry of the Reverend Claire Feingold Thoryn. Beyond that, 2015 marks the 180th anniversary of the gathering of what would become Follen Church in the Stone Building that still stands next door. And it is the 175th anniversary of the dedication of the current church building, one day after the tragic death of Charles Follen. It is thus an auspicious time to craft a new long-term plan to guide our next several years of collective fellowship, worship, and action in the world. This plan has been developed in a series of stages—as described below—to culminate in a vote by the Congregation at the Annual Meeting.

I. Background

The by-laws that currently guide Follen’s governance—as adopted in 2007 and amended, most recently, in May 2013—call upon Parish Board to “prepare or cause to be prepared...a long-term plan for the Church...” (Article V.B) The most recent plan was written and approved in 2009, superseding a prior 2000 long-term plan. While the by-laws do not specify an interval for updating the long-term plan, both prudence and precedent call for a fresh look at around the five-year point, and certainly within a decade after the prior plan. Accordingly, Parish Board commenced work during the 2013-14 church year with a two-year timeline for an updated plan.

Early in our work, Parish Board reached the consensus that the 2009 plan—the first in the current governance era for Follen—is an impressive and still-valid statement of shared values, goals, and priorities. Rather than consigning that plan to history and starting with a blank slate, we decided to essentially reaffirm its fundamental content while seeking to identify important new realities that require revised means to serve enduring ends. The focus, in other words, would be on what had *changed* for Follen and the (narrower and wider) contexts around it since the drafting of the prior plan.

II. Essentials of the existing long-term plan

Fourteen Follenites—from within and beyond Parish Board—led a nearly two-year effort to produce the 2009 long-term plan.² Through a variety of venues, members of this group and the broader congregation reflected upon age-old Follen and UU values as well as the then-new

¹ Voting members of Parish Board are Howie Bernstein (vice-chair), John Dacey, Jack Donahue (chair), Chris Farnham, Kyle Johnson, Bob Heingartner, and Rosemary Trowbridge. Non-voting members—though participants in discussion—are auditor Ellen Adolph, clerk Anne Rodman, and Reverend Claire Feingold Thoryn.

²These architects of the 2009 plan were Alex Bromley, Linda Dacey, Alice Dunn (chair), Karen Edmonds, Faith Ferguson, Orian Greene, Debora Hoard, Brad Howe, Kyle Johnson, Walter Leutz, Meg Muckenhoupt, Harriet Peterson, Don Snodgrass, and Jane Spickett.

governance structure to synthesize a plan anchored in a simple but powerful four-part declaration of the congregation's 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.³

From this statement, our predecessors derived a set of concrete “mission areas” that comprise the core of the 2009 long-term plan, summarized in Appendix 1. The majority of these goals have been accomplished, some almost completely and others to a somewhat lesser extent. In our view the planning efforts of these predecessors, and the work of the whole congregation to give life to that plan, warrant a great deal of collective satisfaction (though not, of course, complacency.) And in celebrating those accomplishments and re-affirming the values behind them, we recognize that we are called upon to advance enduring values in evolving ways for the next stage of our journey together.

III. Process

In many ways “plan,” with its suggestion of a well-defined sequence of actions to be taken, is a misleading description of this document. Inspired by the bedrock commitments that underlay the 2009 plan, we are here setting out a general strategy for continuing that journey rather than plotting out, step by step, the precise path we will pursue. We are marking the stars that will guide us. But we leave it to our successors—and future selves—in leadership, Action Teams, and the congregation at large to discover the exact destinations and the best routes to reach them. The detailed choices that we make will depend on many factors, including the shifting composition of our community, congregational leadership and the trajectory of the wider world. Consider this an attempt to frame a vision for who we are, who we want to be, and how we aim to transform our world, our community, and ourselves in the coming years. It is up to us, and to those who choose to join us, to determine how we can live this vision.

The process for producing Follen's next long-term plan spanned the period from September of 2013 through May of 2015. Rather than an insular exercise of debating alternative priorities among ourselves, Parish Board instead sought to create and draw upon multiple, diverse channels for the views of the congregation. This effort has involved a great many people

³ June 5 2009 Long-Term Plan, accessible at <http://69.195.124.161/~follenor/wp-content/uploads/2011/05/Follen-Long-Term-Plan-06.2.091.pdf>

aside from the membership of Parish Board, including the Action Teams that carry out most of the work of the church, the leaders of Program Council, a set of special planning task forces, and at several points the entire congregation. Recognizing that many members and friends—particularly those with demanding jobs, young families, or health and mobility challenges—would be voiceless if priorities are solicited in meetings, we have sought to engage the congregation through distributed drafts and on-line surveys.

Fall and Winter of 2013-14: At a relatively early stage of the process, Parish Board recruited four Follenites from outside the board itself—some church members of long standing, others new—to chair “task forces” seeking to identify candidates for the major new realities our updated strategic plan should recognize. Each task force leader, in turn, recruited other members representing a mix of seasoned and fresh perspectives to examine one of four domains: Follen itself; the communities around Follen; the nation; and the world at large. The individual task forces commenced meeting to develop their own methods for surveying their assigned domain for candidates for the post-2009 developments most salient for the future of Follen. These task forces were:

- New Realities Within Follen: John Dacey (chair), Cas Groblewski, Nina Dodd, Bob Halliday, and Margaret Micholet
- New Realities In and Around Lexington: John Griffith (chair), Fred Johnson, Sophie Morgan, and Meg Muckenhaupt
- New Realities in the Nation: Carl Byers (chair), Lindy Cassidy, Alexis Johnson, Ruth Lyddy, and Herman Marshall
- New Realities in the World at Large: Karen Gray Carruthers (chair), Lisa Snellings, Carol Rose and Catherine Rielly

The task forces took shape in November and December of 2013 and conducted their work in January and February of 2014.

Spring of 2014: In March, the four task forces submitted the results of their exploration and reflection to Parish Board. A list of 20 such new realities—five each for new developments in the world at large; in the nation; in the communities around Follen; and in the church itself—was distilled from their work. This list was shared with the congregation in May of 2014, in the form of an on-line survey. Follenites were invited to reflect on the twenty items, and to indicate their own views of how important each should be considered when shaping the five-year plan.

Multiple reminders led to a good response rate, with 82 Follenites completing the poll. The pattern of responses suggests an encouraging consensus about what matters most for our shared future. For the most part, respondents were close together in the ranking they accorded individual items. At the same time, the survey does indeed point to some areas perceived as especially important, including climate change, gun violence, the erosion of America’s middle class, and our own congregation’s growing size, diversity, and vigor.

Fall of 2014: In the first half of this church year, Parish Board members briefed Program Council on the status and next steps of the planning process, and in particular solicited input from the various Action Teams. The results of the task force research and subsequent congregational survey were shared, in detail, with Action Teams, who were asked to keep those results in mind when considering near-term agendas and medium-term priorities in their respective domains of responsibility. (Synopsis of these Action Team submissions are included in Appendix 2 of this plan.) Meanwhile, Parish Board worked to assemble financial and other data relevant to the overall planning process. By the end of 2014 the pieces were in place to articulate for the congregation a preliminary draft of the next long-term plan.

Early February of 2015: The first preliminary draft was discussed, revised, and approved by Parish Board. It was then shared with the congregation (via multiple channels) with the explicit understanding that it was a tentative and incomplete plan subject to congregational reactions and subsequent revision. In particular, this draft featured alternative versions of several sections, with the version to be included in the final draft determined by congregational reactions.

February and March of 2015 A survey was shared with all members and friends of Follen seeking views on several “open questions.” The items covered in the survey were not necessarily the most important elements of the next long-term plan, but rather those items for which Parish Board was somewhat uncertain about the center of gravity for congregational views. Follenites were prompted multiple times to complete the survey between mid-February and mid-March, and the response was excellent. 126 Follenites responded to the survey, most in online-form, although a few responses were incomplete. The large majority of respondents indicated that they had read and reflected upon the preliminary long-term plan prior to engaging the survey questions. A majority of respondents were also signed members who planned to attend Annual Meeting. (While respondents were asked to identify themselves as either members or friends of Follen, we made no use of this distinction in interpreting the results.) The results of this survey are summarized in Appendix 3.

March and early April of 2015: Parish Board collected, analyzed, and discussed the results of the congregational survey. The results of that discussion informed the final long-term plan, which was shared with Parish Board for reflection, comment, and revision and unanimously approved at the April meeting.

April and early May of 2015: The plan was distributed to the congregation for consideration.

May 14, 2015: The plan was approved by the Congregation at Annual Meeting.

IV. Financial status and prospects

Our community expresses its priorities and pursues its missions in many ways. But financial resources both empower and constrain our collective work. While multiple sources underpin Follen’s budget, pledging accounts for by far the largest share—an average of over two-thirds over the 2009-2014 period. (Please see the table below.) Rental income provides about 13 percent, and special events such as the East Village Fair and the Christmas tree sale deliver another 10 percent. Follen’s relatively small endowment is fragmented into multiple accounts, only one of which is available to support general church spending. In some years leadership decides to forego endowment income almost entirely in favor of re-investment for the future. Thus endowment income is highly uneven, but averaged about 1.1 percent of the church’s budget.

Follen's Total Revenue and Sources, Church Years 2009-14

	2,009	2010	2011	2012	2013	2014	Average Share
Total Revenue	\$ 505,120	\$ 490,732	\$ 516,683	\$ 534,397	\$ 533,220	\$ 539,799	
Pledge	64.2%	65.7%	65.9%	63.7%	70.1%	75.5%	68.2%
Rentals	15.4%	15.5%	14.8%	14.8%	10.1%	10.5%	13.2%
Events	10.1%	8.8%	10.6%	9.1%	10.3%	10.2%	9.8%
Endowment	0.03%	0.02%	0.01%	3.8%	1.4%	0.03%	1.1%
Everything else	10.2%	10.0%	8.7%	8.6%	8.1%	3.8%	7.8%

Our community has shown remarkable financial strength over the past few years. A campaign to “re-think” stewardship, launched in the 2012-13 church year, called on all Follenites to step up their support to lay the foundation for a new ministry. It also emphasized that we should celebrate, not shrink from, the fact that Follenites with the means to do so make especially large financial contributions. Pledge revenue surged after the “re-think” from less than \$350,000 in 2012 to more than \$423,000 in the current church year.

This represents a departure from pledge income that essentially kept pace with inflation, as an average for the period, from 2005 through 2012. For purposes of this long-term plan, however, the future is of more interest than the past. While the future is ultimately unknowable, Parish Board members have developed two plausible scenarios for the next several years.

The first scenario is relatively conservative. It assumes that:

- Annual pledge growth slows to 3 percent;
- Rental income increases by 3 percent a year;
- Payouts from the endowment increase by 2 percent a year;
- Special-event income grows by only 1 percent a year.

Under this scenario, the annual budget could expand by about 2.7 percent a year. This would outpace expected inflation but would permit only limited increases in Follen’s activities.

Conservative Scenario for Follen’s Income, by Church Year					
2015	2016	2017	2018	2019	2020
\$579,429	\$594,842	\$610,665	\$626,908	\$643,584	\$660,703

The second scenario is more optimistic and aspirational. Its assumptions are that:

- The spike in annual pledging from the stewardship re-think and Claire’s arrival continues, so that pledge income grows by 6.5 percent a year;
- Rental income—as in the first scenario—increases by 3 percent a year;
- Payouts from the endowment increase by 3 percent a year;
- Special-event income grows by 2 percent a year.

Under *this* scenario, the overall budget could grow by more than 5.5 percent annually, significantly faster than inflation. While by no means all of our hopes and dreams could be accommodated, this budgetary path would allow for meaningful increases in what we can do together.

Aspirational Scenario for Follen’s Income, by Church Year					
2015	2016	2017	2018	2019	2020
\$579,429	\$611,587	\$645,530	\$681,357	\$719,173	\$759,087

These two scenarios are chosen to bracket the most likely range for Follen’s financial future. But it would not be shocking for reality to turn out to be worse than the conservative projection or better than the aspirational. An economic downturn, the loss of a major rental customer, or dissension in the church that drives members away could cause income to dry up. A surge of new members or a renewed and sustained spike in generosity could swell our budget. Perhaps the *least* probable future, in fact, is perfectly steady growth along either of these paths. Historically pledge growth, which dominates the budget, has been quite uneven. But these scenarios give a reasonably good sense of the probable range of financial opportunities and constraints we will be dealing with in the years ahead.

The stewardship campaign for the 2016 church year—still underway when the preliminary version of this plan was written—turned out to be spectacularly successful. The boost in pledges for next year exceeds 10 percent, permitting a planned budget for the 2016 church year a bit above even the “aspirational” scenario. The number of pledge units leapt from 215 to 240 in a single year, representing both a remarkable 95% pledge rate among members and a large number of non-members who nonetheless pledge. Stewardship leaders have done a superb job helping all of us recognize and act upon our gratitude to Follen, and the community has stepped up impressively to support our shared values and goals. While few expect double-

digit gains to continue indefinitely, the upward trajectory of congregational generosity that commenced with the 2012 “re-think” appears to be continuing. At the same time, the appetite for increasing Follen’s positive impact on ourselves, our community, and the broader world that this planning process has revealed underscores the importance of perseverance in our stewardship efforts.

Towards a Capital Campaign: Even the “aspirational” scenario for growth in annual income would support only some of the many, many opportunities before us to widen Follen’s achievements and expand the reach of our shared values. Several of the growth opportunities flagged by the Action Teams—acquiring additional space, enlarging the endowment, even installing a new elevator—are hard to imagine or even impossible with only incremental annual increases in fund-raising. Many churches and other non-profits conduct a “capital campaign” every decade or two to enable major investments or for other extraordinary purposes. Expected capital contributions are typically one to three times the scale of regular annual contributions, in addition to that annual pledge amount. A successful capital campaign during the period of this plan can let us not just dream big, but *act* on those dreams. But it depends on our collective ability and willingness to make capital contributions for the long-term *without* slowing the growth of our commitment to the annual pledge drive that supports current activities. It is important to note, too, that the proceeds from a capital campaign are normally used for one-time or rarely recurring investments—such as acquiring or upgrading physical space—and not for ongoing expenses such as staff compensation.

Given the importance of robust congregational support, the survey conducted as part of this planning process asked Follenites whether they believe a capital campaign is necessary, and whether they themselves are prepared to participate. The response was clearly positive. Some respondents were skeptical about the need for or feasibility of a major campaign, and quite a few noted—very reasonably—that before launching such a campaign it will be important to define and broadly validate its specific scale, rationale, and missions. But the congregation’s affirmative response lays the predicate for Follen to plan and carry out a significant capital campaign within the next few years.

Shifting our Endowment to Climate-Friendly Funds Follen’s endowment represents resources dedicated in the past—whether near or distant—to advance the enduring interests of our church. The three elected trustees have a duty of stewardship over this gift from the past to the future. They are responsible for ensuring that short-term needs do not make undue claims on long-term resources; that funds are invested prudently; that spending from endowment is for appropriate purposes; and that this generation of Follenites follows its predecessors’ tradition of mindfulness toward the needs of the future. Each year Program Council requests, and Parish Board approves, a payout from the endowment for the next year’s budget. The size of the annual payout is based on the Trustees’ judgment of what can be withdrawn for present spending while still ensuring growth for the future. As noted earlier, this payout is very uneven, and in some years there is no payout at all.

Our endowment is too small to prudently invest in individual companies. Instead, it holds mutual funds that bundle together a variety of separate securities. While Follen has no *direct* investments in fossil fuel companies many of the endowment's equity funds, like all but a few such funds, do include companies involved in fossil-fuel exploration, extraction, or distribution. The extensive process of deliberation and consultation behind this plan provided us an opportunity for deciding whether to eliminate those investments as part of our response to the threat of climate change. While there is a range of opinion on this issue, the variant of divestment that shields the future from any burdens this might entail earned majority support.

This is a modest response to a massive challenge. Climate change caused by human action threatens the Earth and all its inhabitants through warming, destabilization of the atmosphere and weather patterns, sea level rise, and the acidification of the oceans. These alterations of the planet, if left unchecked, will cause enormous suffering, especially among the world's already disadvantaged people. We in Follen recognize our moral responsibility to current and future generations to do everything in our power to bring about a swift transition from fossil fuels to a sustainable energy economy. Many steps to a sustainable future are open to us, including the recent decision to buy solar-generated electricity and ongoing efforts to reduce our congregational and individual carbon footprints. An additional step is to publically signal our commitment to the transition from fossil fuels through our investment choices. A growing movement orchestrated by the environmental organization 350.org is calling upon universities, pension funds, public entities, and religious institutions to divest their holdings in the 200 major fossil fuel companies listed by the Carbon Tracker Initiative (CT 200). Our long and careful process of reflection and discussion, amplified by the UUA's 2014 divestment resolution and culminating in the "open questions" survey component of this long-term planning process, has generated a mandate for Follen to join this movement.

Thus once this long-term plan comes into effect at the start of the 2016 church year, the Trustees will commence a transition of Follen's endowment investments away from the current mix of mutual funds and into funds that are free of securities on the CT 200 list. This transition will be complete within five years. The Trustees will use their expertise and judgment to determine the appropriate pattern of this transition. While fully respecting the Trustees' legal duties and the discretion this entails, Parish Board notes the general expectation that this shift of investments will commence soon and be spread over the whole five-year period rather than concentrated at the end. We recognize that there may be institutional complications to this transformation, but expect any that arise to be expeditiously resolved.

We also observe that if the eventual destination of the endowment's investments is the UUA's Common Endowment Fund, rather than other fossil-fuel-free investment vehicles, we will be able to advance other social investment goals as well as the avoidance of fossil fuels. Environmental concerns are only one of many potential dimensions of socially responsible investing. The Social Justice Action Team has formally called for Follen to "seek to align our endowment investments to support our social justice focus and concerns and Unitarian Universalist principles" in general, not just with respect to fossil fuels. To develop a consensus definition of "socially responsible investment" for Follen would be a very complex and time-consuming process, and our endowment is far too small for some forms of SRI. If we transition into the Common Endowment Fund, however, it already applies a range of social screens tailored to UU principles. If the Trustees decide that the best way to disengage from fossil fuels is by some means other than the Common

Endowment Fund, or if evidence arises that the Common Endowment Fund's definition of socially responsible investing is at odds with that which most Follenites would endorse, we will need to take up this issue.

The congregational mandate for divestment includes the conviction that divestment sends the strongest signal if we do not push any associated financial burden onto the future. The current Parish Board hopes and generally expects the economic disadvantages of fossil-fuel-free investments to be relatively modest in the short run, and to improve over time. But there may well be at least some cost, which we are committed to bear ourselves rather than slowing the growth of the endowment. As future versions of Program Council and Parish Board consider the appropriate endowment payout for each coming year's budget, they will take into account the prior year's "opportunity cost" of foregone return—if any—attributable to divestment, and reduce endowment withdrawals accordingly. During the transition years this will be based on the Trustees' comparison of the returns of the fossil-fuel-free and conventional parts of the endowment. In the first year of complete divestment, the benchmark for comparison will be the prior year's remaining portfolio of conventional funds. At the end of the period of this long-term plan, this arrangement will be reconsidered by Parish Board. It may by then be possible to maintain a fossil-fuel-free endowment and ensure growth for the future without limiting the endowment's contribution to the annual budget. The Trustees will include the progress of divestment in their contributions to each year's annual report.

While this version of divestment garnered majority support, Parish Board calls to the congregation's attention the fact that some Follenites would prefer a different version of divestment, while others would prefer to dedicate the return from fossil-fuel investments to climate action, or to simply retain current investment policies for the endowment. We honor these views and the convictions behind them, and expect all members of our community to engage together in respectful fellowship in the continuing conversation over our response to the threat of climate change. Divestment must be just one step toward fulfilling our commitment to bequeath to future generations a livable planet.

V. Growth and staffing

Over the period of this long-term plan we will need to grapple with two additional issues potentially featuring tradeoffs across important values. One of these is the question of growth; the other is the balance between volunteer and paid work.

Our community is growing. Much of this is clearly due to our magnificent new minister. But other factors are probably at play as well, including demographic trends in Lexington and surrounding communities favorable to our distinctive culture and faith tradition. It is important to note that at least as of early 2015 there has been limited growth in membership. But other measures—the size of the Junior Choir and the FUUY youth group, high levels of participation in Covenant Groups, the packed pews at most services—give a strong impression of an expanding congregation. Many of us are confident that this growth will soon be more visibly reflected in formal membership.

There is much to celebrate in this trend. Two of the “new realities” rated as the five most significant in the survey of congregational priorities early in this planning process were broadly positive aspects of Follen’s expansion. At the most basic level, we rejoice in the enlargement of our circle of shared values. Beyond that, new members and friends bring fresh vitality, diverse perspectives, and additional talents and capabilities. Rising numbers of financial supporters can fortify Follen’s capacity for good work within the church and in the world beyond.

Yet growth has its challenges. Services are sometimes crowded. New members and friends may not initially make major pledges, and there is a risk that the financial burdens of growth will increase faster than the financial benefits. More than a few Follenites have expressed concerns that growth could dilute important aspects of our community’s special culture and tradition. Uncertain about the balance between celebration and caution in congregational opinion, Parish Board included a specific question about growth in the 2015 survey.

In what is the most emphatic affirmation of any item in that survey, Follenites endorsed the view that we “should joyfully welcome newcomers and connect them to all our congregation offers. While it presents undeniable challenges...growth is on balance good for our community. I am confident this congregation can hold on to its unique gifts while working through the losses inherent in any change.” Only four respondents disagreed—none of them strongly—while over 100 agreed with this statement. These results do not dismiss the challenges that growth presents. Rather, they underscore our collective confidence that we can overcome those challenges, and that the gains from expanding our community will more than repay the effort this requires.

Staffing: The work of Follen always has depended, and almost certainly always will depend, on members’ and friends’ generous contributions of time and talent. Volunteer work of all kinds—making music, selling trees, ministering to fellow congregants, serving the less fortunate, attending to financial and legal issues—is a hallmark of our community. Yet in recent years it has become increasingly difficult to recruit volunteers for a number of key roles. Some Follenites feel the strain of meeting their commitments to their church without short-changing their family and professional obligations.

There has been a limited trend to increase paid staffing for some church functions, in part to enlist appropriate expertise but also to reduce the need to recruit unpaid volunteers to do the work. Whether this trend should continue is an important question for the long-term plan. Some believe that our traditional degree of reliance on volunteers has become unsustainable: Non-working spouses available for church duties are a thing of the past. A tilt toward younger families and away from empty-nesters and retirees may likewise limit the average Follenite’s capacity for volunteering. Yet from the start of the planning process, Parish Board members also heard many voices declaring volunteer work to be fundamental to our identity and a core means by which we build and express our faith tradition. Thus on this issue, as well, we felt it appropriate to survey the congregation.

We posed two statements—copied in whole below—without knowing which would garner more support, but expecting either one or the other to be validated.

One statement: *“While volunteering should always remain important, I believe a significant incremental shift toward paid staffing is appropriate over the period of this long-term plan. In support of this belief, I am prepared to increase my financial contributions beyond what I otherwise would to allow the hiring and fair compensation of the additional staff required.”*

The other statement: *“While there will always be an important role for paid staff, I believe that the performance of much of our collective work by volunteers is an essential part of our tradition that should be preserved and reaffirmed. There should be only very limited shifts toward paid staffing over the period of this long-term plan. In support of this belief, I am prepared to step up my contributions of time to ensure that the work can be accomplished.”*

Like the other “open-question” survey items, these were worded to elicit not just opinions but commitments. So we were somewhat surprised—and delighted—that *both* statements were endorsed by a majority of respondents. This “yes to both” result shows that Follenites place such value on the work of the church that we are willing to commit both more time and more money to enable and enlarge it. It is important to note that there was more than a little disagreement, some of it strong disagreement, with each statement, and that sentiment in favor of expanding paid staff was somewhat stronger than the reaffirmation of volunteer work. This suggests a mandate for the cautious, not aggressive, growth of paid staff.⁴ And it underscores that in the years ahead we must remember that some among us do not feel able to significantly increase the time they commit, the contributions they make, or in some cases either form of support.

VI. A final observation

This planning process has revealed that while we do not agree on everything (and how dull that would be!) we agree on the things that matter. In a letter to his friend Harriet Martineau, the English writer who first described in print the Follen family’s Christmas tree, Charles Follen wrote these words: “The principles in which we live and move and have our being, though as old as the creation of man, are still a new doctrine, the elements of a new covenant....” So it remains. The commitments and convictions that anchor this plan reach backward in a continuous chain from Reverend Follen and the events, ideas, and people that shaped him, through the thousands who have come together in our gorgeous octagon since 1840, and to those of us who gather there today. And they will extend forward—the core values constant; their applications ever-changing—through the years covered by this plan, onward to the next long-term plan and the ones after that, carrying forward to Follenites still unborn. Let us begin—with fellowship, with joy, and with confidence—this next stage of our journey together.

⁴The decision to hire a Director of Community Engagement coincided with this planning process—and is affirmed by the results of the survey—but was not the specific focus of our planning. We expect this will be the largest single expansion of paid staffing for the next several years, though there may well be some smaller changes, such as slightly greater use of contractors for particular functions.

Appendix 1: Excerpt from opening section of 2009 Long-Term Plan

Mission Area 1: 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.

Mission Area 2: 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

Mission Area 3: 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

Mission Area 4: 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

Appendix 2 Synopsis of Action Team input

Parish Board requested Action Teams to reflect and report upon prospects for the next five or so years in their domains of responsibility. Each Action Team was invited to summarize special challenges and opportunities anticipated over the next several years; identify particular growth priorities; and, if desired, offer any other observations germane to the plan. Key points from these submissions are summarized here; in most cases there is much more detail available from the Action Team itself or from the material they provided to Parish Board.

Action Team	Financial and Human Resources
Challenges	<ul style="list-style-type: none"> ● Growing dependence on pledge revenue ● Increasing demands of a growing congregation on physical and financial capacity ● Potential staff transitions and need for succession planning ● Rising staff health-care costs
Opportunities	<ul style="list-style-type: none"> ● Embrace, anticipate, and staff for continued growth ● Consolidate and build on recent success in stewardship
Growth Priorities	<ul style="list-style-type: none"> ● Develop and seize opportunities for expansion of physical capacity ● Expand the endowment in the service of future financial stability

Action Team	Worship and Music
Challenges and Opportunities	The challenges and opportunities identified by the Worship and Music Action Team centered on the issue of growth. (WMAT leaders have consulted with a growth expert from the UUA.) Over the period of this long-term plan it is important to define what it is that makes Follen so special. How can we preserve the key features of our culture and identity while embracing the desirable aspects of change and diversity that come with growth?
Growth Priorities	<p>If there is significant growth, WMAT calls for considering:</p> <ul style="list-style-type: none"> ● A second Sunday service and/or new types of services ● An additional minister ● Incremental space, potentially the acquisition of the Stone Building ● Additional administrative staff time
Keep in mind...	Over the period of this plan, there is a fundamental choice of whether to embrace growth and make the changes required to accommodate it, or consciously decide to anchor on a more comfortable and accustomed scale for Follen.

Action Team	Religious Education
Challenges and Opportunities	<ul style="list-style-type: none"> ● Substantial growth in number of youth attending Religious Education (RE), middle school youth group, Our Whole Lives (OWL), Coming of Age (COA) and Follen Unitarian-Universalist Youth(FUUY). ● Need for identifying strong and consistent curriculum that can be effectively shared ● Need for staff for web support and development of technologies for RE for communication, registration and other administrative functions, and access to online curriculum. ● Ongoing need for teacher recruitment and support especially pre-K/K where consistency is needed ● Communication of co-op model and purpose and goals of RE ● Scaffolding and orientation for newest teachers and teacher support generally including mentoring and meeting with the RE Director – Exploring new models ● Developing more Inter-generational opportunities: (Adult Sunday classroom visitors and FUUY teachers helping, special Sundays etc.) ● Being attentive and flexible to a community with diverse needs. ● Recruitment/involvement of more mature congregants who may not have thought of teaching RE.
Growth Priorities	<ul style="list-style-type: none"> ● Need for additional support staff to help with development of technologies for communication, scheduling, registration, and sharing curriculum, and resource sharing. ● Hire long term staffing for Preschool and K classes so we can have more consistent caretakers for our youngest children and newest adults coming to Follen. ● Expand hours of paid youth advisor to retain a UU with long-term commitment to support youth ministry including FUUY, OWL, & COA.
Keep in mind...	Consider creating an Adult Programs

Action Team	Pastoral Care
Challenges and Opportunities	<p>PCAT directly invoked the highly-ranked “new reality” of “growth in scale and diversity of engagement” as a broad source of both challenges and opportunities. This Action Team also sought to stress that—in line with a recent bylaw change, as well as an increasingly solid consensus—pastoral care is <u>not</u> specifically a matter for those in need but reflects a broad, mainstream category of community activity. Specific areas warranting attention include:</p> <ul style="list-style-type: none"> ● Burgeoning recent growth in Covenant Groups ● The revitalization of the Volunteer Service Network ● Expansion of support groups, workshops, and other venues for small-group interaction.
Growth Priorities	<p>Priority 1: Expand scope of existing groups, such as:</p> <ul style="list-style-type: none"> ● Extend Caring Congregation from planning and care for adult special-needs children to greater consideration of emotional and mental health; publish the CC curriculum to benefit those beyond Follen. ● Extend the Covenant Group model to include inter-faith groups. <p>Priority 2: Expand adult programming in general and support groups particularly, potentially including: bereavement, chronic illness, depression, and aging.</p> <p>PCAT believes that the pursuit of these priorities would require additional professional staff capacity, not just stepped-up volunteer hours. It concurs with Religious Education that the REAT cannot be expected to handle on its own an extensive increase in adult programming.</p> <p>PCAT strongly endorses the exploration of expanded Follen space, potentially involving the acquisition of additional buildings. A subgroup also favors exploring the option of acquiring the time of a van for Sundays after church for collective transport to events such as Sundays Bread.</p>

Action Team	Social Justice
Challenges	<p>The Social Justice Action Team conducted an ambitious retreat to consider an appropriate social-justice vision for Follen in connection with this long-term plan, and identified a rich array of challenges and opportunities.⁵ The main challenges are:</p> <ul style="list-style-type: none"> ● <i>Staffing</i>: It is increasingly difficult to sustain the scale and diversity of Follen’s social-justice work without dedicated staff support. ● <i>Funding</i>: The uncertainty and inadequacy of funding from annual budget decisions, Share the Plate, and special fundraising is problematic for SJAT and its community partners. ● <i>Political Climate</i>: At the national and (with less certainty) state levels, electoral trends have brought in leadership indifferent or actively hostile to Follen’s conception of social justice.
Opportunities⁶	<p>SJAT sees four major opportunities for Follen over the period of this long-term plan:</p> <ol style="list-style-type: none"> 1. <i>Develop a community ethos of active participation in social justice</i> 2. <i>Deepen our understanding of differences among people and build alliances across differences including race, sexual orientation, gender identity, social class, physical ability, and nationality</i> 3. <i>Raise consciousness at Follen and in the larger community about Follen’s social justice efforts</i> 4. <i>Increase Follen’s stewardship of the environment</i> 5. <i>Seek to align our endowment investments to support our social justice focus and concerns and Unitarian Universalist principles.</i>
Growth Priorities	<p>SJAT would like to see over the course of this long-term plan</p> <ul style="list-style-type: none"> ● <i>Increased and dedicated financial support</i>: Higher levels of financial support, and guaranteed funding that is not subject to the uncertainties of annual budget decisions or special fund-raising, would permit a social-justice mission consistent with Follen’s history and values. ● <i>Dedicated staffing</i>: This mission requires a full-time professional—such as an assistant minister or intern—largely or wholly devoted to social-justice activities, as well as all or part of the time of a support staffer.

⁵ Summaries are included here. Texts giving detail can be obtained from Kathy Spang or Stan Griffith.

⁶ Revised for the final version of the plan at SJAT’s request.

Action Team	Community and Hospitality
Challenges and Opportunities	<p>A wide range of challenges and opportunities driven by growth:</p> <ul style="list-style-type: none"> ● Increasingly scaled-up Hospitality Hour ● Larger attendance at Stewardship Dinner and other social events ● More demands for new-member integration and outreach ● Greater demands on communications assets ● Overloaded kitchen and other spaces ● Risk of burnout for CHAT volunteers
Growth Priorities	<ul style="list-style-type: none"> ● Logistical, financial, and personnel support for social events—including a proposed Volunteer Coordinator to serve CHAT and other AT missions ● Work with B and G to improve accessibility ● Continue and consolidate communications improvements
Keep in mind...	<p>“Question the assumption the growth is always a good thing...How much can we grow without losing who we are?”</p>

Action Team	Buildings and Grounds
<p>Challenges and Opportunities</p>	<p>On-going maintenance of the buildings and grounds Balance historic character and safety and durability Continue to manage drainage problems Maintain & prepare to update heating and cooling systems (capacity, efficiency) Clock maintenance Bicycle rack(s)?</p> <p>Up-grade handicapped access to the church Aging population of active church members will need better access Ramp to sanctuary Lift and elevator - upgrade for modernization, more universal access</p> <p>Accommodate larger numbers using the church A/V to allow for Community Center video of services (already budgeted but not yet finished) Look into how to accommodate large numbers of church members for functions (Waldorf and alternatives) Security (locks etc.) More meeting and office space?</p>
<p>Growth Priorities</p>	<p>Handicapped Access to the church A new elevator (likely \$100K +?) is a priority B and G; an updated lift (maybe \$20,000?) and a ramp directly to the sanctuary (\$20,000?) will also be needed to make our facilities accessible to all. While the ramp and lift work could potentially be done out of building reserves separately on sequential years, an new elevator will require a capital campaign</p> <p>'Octagon Garden' between Follen CC and Barnes Place A long-dreamed-of plan for more aesthetic outdoor gathering/gardening/celebratory space. Relatively low budget now that drainage and parking are resolved.</p> <p>Extended Sidewalks along Driveway Provide safe paved pedestrian access from Mass Ave sidewalks to Community Center entrance.</p>
<p>Keep in mind...</p>	<p>The furnace and roof will need replacement one day; the outside clapboards and gutters need constant maintenance and regular re-painting.</p> <p>The acquisition of the Stone Building, the Sacred Heart hall, or the office building 2 doors down Mass Ave or other expansion space would change everything pretty radically.</p>

Appendix 3

Results of Congregational Survey of February-March 2015

The survey covered seven items, some of them alternative approaches to related issues, for which Parish Board sought as broad as possible a range of congregational views. Follenites were invited to give more nuanced open-ended comments as well as indicating their basic views about each item on a five-point scale ranging from “strongly disagree” to “strongly agree,” with an aggregate score of 3 reflecting a balance between agreement and disagreement and anything above that level indicating net agreement. For five of these items there was a clear preponderance of favorable views.⁷

Summary of survey statement	Survey score
Growth presents challenges but is on balance clearly good for Follen.	4.23
Endorsement of and readiness to support a capital campaign within the next several years.	3.52
While volunteering remains important, endorsement of and readiness to pay for an incremental shift toward paid staff.	3.45
Transition Follen’s endowment out of funds containing fossil-fuel investments over five years; any sacrifices in return will be covered by reducing endowment payouts for current spending.	3.21
Even if there is an incremental shift toward paid staff, reaffirmation of and readiness to increase participation in Follen’s culture of volunteering.	3.10

⁷ An alternative variant of fossil-fuel divestment—without covering any loss of return through reduced current claims on the endowment, and with an expectation of individual as well as congregational divestment—fell slightly below this level, with an aggregate score of 2.91. And an alternative *to* divestment, which would have retained fossil-fuel investments but devoted the proceeds to climate activism, had exactly the same aggregate score of 2.91.