

# Follen Church 2015 Long-Term Plan

## Preliminary Version of February 9, 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 180<sup>th</sup> anniversary of the gathering of what would become Follen Church, in the Stone Building that still stands next door. And it is the 175<sup>th</sup> anniversary of the dedication of the current church building, one day after the tragic death of Charles Follen. It is 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 is being developed in a series of stages, with this document being an intermediate step—as described below—toward a final draft in May.

### I. Background

The by-laws that currently guide Follen’s governance—as adopted in 2007 and amended, most recently, at the Annual Meeting of 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 on a new plan during the 2013-14 church year and will complete that work in the current church year, culminating in a plan submitted for congregational approval in May 2015.

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, was 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.<sup>1</sup> Through a variety of venues, members of this group and the

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<sup>1</sup>These 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.

broader congregation reflected upon age-old Follen and UU values as well as the then-new 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.<sup>2</sup>*

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.)

As noted earlier, Parish Board is opting to reaffirm rather than replace the high-level mission statements of the existing plan. But we have deliberately not taken that plan's detailed action items as the starting point for the new long-term plan. We may of course decide to make enlarging our endowment or publicizing our values and achievements—to name, for illustrative purposes, two incompletely achieved goals—top priorities for the next plan. But we would do so because our contemporary review points to these as especially important opportunities to advance today's shared goals, rather than because they are tasks left over from the 2009 plan.

### 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 right routes. 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

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<sup>2</sup> 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>

community, and ourselves in the coming years. It is up to us, and to those who choose to join us on the journey, to determine how we can live this vision.

The process for producing Follen’s next long-term plan spans the period from September of 2013 through May of 2015 and involves a great many people, from the membership of Parish Board itself, to the Action Teams that carry out most of the work of the church, to 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 the work is done mostly in meetings, we have sought to engage the congregation through distributed drafts and on-line surveys.

**Fall and Winter of 2013-14:** 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 Hermann 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. (While suggestions arose for additions, subtractions, and rewording of the 20 items, we felt it important to faithfully use the work of the four task forces.) The online poll invited respondents to rank items on a scale ranging from “Warrants Little Attention in the Plan Update”—with a numerical equivalent of “1”—to “Warrants Maximum Attention in the Plan Update” with a numerical equivalent of “5”.

Multiple reminders led to a good response rate, with 82 Follenites completing the poll. From the fact that no item was ranked as low as “2” on average—that is, every item exceeded the

“moderate attention” level—we can confirm that the task forces did an excellent job of identifying items that mattered to the community. 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. The five top-ranked items all averaged above 3.0—that is, above the “significant attention” level—while the bottom five were in the range of 2.0 to 2.5. These 20 items and their rankings are included in Appendix 1.

**Fall of 2014:** In the first half of this church year, Parish Board representatives 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. 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.

**Winter of 2015—current phase:** This preliminary draft will be revised and approved by Parish Board, with the explicit understanding that it is a tentative version of the plan subject to congregational reactions and subsequent revision. In particular, this draft features alternative versions of several sections, with the version to be included in the final draft determined in large part by congregational survey responses.

**Spring of 2015—to come:** In March and April, Parish Board will revise the draft in response to congregational input and our own deliberations. The final revised version will be shared with the membership for a vote at the annual meeting in May.

IV. Synopses 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.

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

<b>Action Team</b>	<b>Worship and Music</b>
<b>Challenges and Opportunities</b>	<p>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?</p>
<b>Growth Priorities</b>	<p>If there is significant growth, WMAT calls for considering:</p> <ul style="list-style-type: none"> <li>● A second Sunday service and/or new types of services</li> <li>● An additional minister</li> <li>● Incremental space, potentially the acquisition of the Stone Building</li> <li>● Additional administrative staff time</li> </ul>
<b>Keep in mind...</b>	<p>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.</p>

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

<b>Action Team</b>	<b>Pastoral Care</b>
<b>Challenges and Opportunities</b>	<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"> <li>● Burgeoning recent growth in Covenant Groups</li> <li>● The revitalization of the Volunteer Service Network</li> <li>● Expansion of support groups, workshops, and other venues for small-group interaction.</li> </ul>
<b>Growth Priorities</b>	<p>Priority 1: Expand scope of existing groups, such as:</p> <ul style="list-style-type: none"> <li>● 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.</li> <li>● Extend the Covenant Group model to include inter-faith groups.</li> </ul> <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>

<b>Action Team</b>	<b>Social Justice</b>
<b>Challenges</b>	<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.<sup>3</sup> The main challenges are:</p> <ul style="list-style-type: none"> <li>● <i>Staffing</i>: It is increasingly difficult to sustain the scale and diversity of Follen’s social-justice work without dedicated staff support.</li> <li>● <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.</li> <li>● <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.</li> </ul>
<b>Opportunities</b>	<p>SJAT sees four major opportunities for Follen over the period of this long-term plan:</p> <ol style="list-style-type: none"> <li>1. <i>Develop a community ethos of active participation in social justice</i></li> <li>2. <i>Deepen our understanding of differences among people and build alliances across differences</i></li> <li>3. <i>Raise consciousness at Follen and in the larger community about Follen’s social justice efforts</i></li> <li>4. <i>Increase Follen’s stewardship of the environment</i></li> </ol>
<b>Growth Priorities</b>	<p>SJAT would like to see over the course of this long-term plan</p> <ul style="list-style-type: none"> <li>● <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.</li> <li>● <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.</li> </ul>

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<sup>3</sup> Summaries are included here. Texts giving detail can be obtained from Kathy Spang or Stan Griffith.

<b>Action Team</b>	<b>Community and Hospitality</b>
<b>Challenges and Opportunities</b>	<p>A wide range of challenges and opportunities driven by growth:</p> <ul style="list-style-type: none"> <li>● Increasingly scaled-up Hospitality Hour</li> <li>● Larger attendance at Stewardship Dinner and other social events</li> <li>● More demands for new-member integration and outreach</li> <li>● Greater demands on communications assets</li> <li>● Overloaded kitchen and other spaces</li> <li>● Risk of burnout for CHAT volunteers</li> </ul>
<b>Growth Priorities</b>	<ul style="list-style-type: none"> <li>● Logistical, financial, and personnel support for social events—including a proposed Volunteer Coordinator to serve CHAT and other AT missions</li> <li>● Work with Buildings and Grounds to improve accessibility</li> <li>● Continue and consolidate communications improvements</li> </ul>
<b>Keep in mind...</b>	<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><b>Challenges and Opportunities</b></p>	<p><b>On-going maintenance of the buildings and grounds</b>            Balance historic character and safety and durability            Continue to manage drainage problems            Maintain &amp; prepare to update heating and cooling systems (capacity, efficiency)            Clock maintenance            Bicycle racks?</p> <p><b>Up-grade handicapped access to the church</b>            Aging population of active church members will need better access            Ramp to sanctuary            Lift and elevator - upgrade for modernization, more universal access</p> <p><b>Accommodate larger numbers using the church</b>            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><b>Growth Priorities</b></p>	<p><b>Handicapped Access to the church</b>            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><b>'Octagon Garden' between Follen CC and Barnes Place</b>            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><b>Extended Sidewalks along Driveway</b>            Provide safe paved pedestrian access from Mass Ave sidewalks to Community Center entrance.</p>
<p><b>Keep in mind...</b></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, St Bridget's Hall, the office building 2 doors down Mass Ave or other expansion space would change everything pretty radically.</p>

V. Financial status and prospects, and two open questions

Our community expresses its priorities and pursues its missions in many ways. But financial resources both empower and constrain our collective work. The prior section’s overview of input from Action Teams compellingly reveals the extent to which incremental funding would enable expansions of valuable activities, while reductions would force difficult choices.

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**

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

Follen 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, with another healthy jump expected for next year.

This represents a departure from pledge income that essentially kept pace with inflation, as an average for the period, from 2005 through 2012. It is noteworthy that the recent jump in income primarily reflects growth in the average pledge rather than a rising number of pledges. While many of us anticipate a growing congregation—on which more below—so far the number of pledge units has not increased significantly. The 215 individuals or families pledging in the 2014 church year were only a few more than the 210 that had pledged ten years earlier, with most years in between featuring a few more or a few less than 200 pledge units.

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 3.2 percent a year. This would outpace expected inflation but would permit only limited increases in Follen’s activities.

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

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.

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

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 two scenarios give a reasonably good sense of the probable range of financial opportunities and constraints we will confront absent extraordinary action.

*Open Question 1* Even the “aspirational” scenario for growth in annual income would support only some of the many, many opportunities before us to enlarge 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 either hard to imagine or flatly 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 covered by this plan could let us not just dream big, but *act* on those dreams. But it would depend 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 can only be used for one-time or rarely recurring investments—such as acquiring or upgrading physical space—and not for ongoing expenses such as staff compensation.

Please consider the following statement. You will have an opportunity to tell us, via an online survey, *whether* and *how much* you agree or disagree:

*Long-Term Plan Open Question 1—Capital Campaign:* “In light of the needs and opportunities before us, I believe a capital campaign is necessary over the next several years, and I am prepared to make a significant capital contribution in addition to my usual pledge.”

*Open Question 2* Climate change was rated the most important of the 20 “new realities” by the 82 Follenites who weighed in on our survey last spring. Even before the UUA Annual Meeting last summer called on congregations to consider the issue, Follen had been exploring whether it is appropriate to divest its endowment of holdings related to fossil fuels.

Background on the endowment Follen’s invested resources, comprising several separate categories, represent 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. When leadership *does* decide to tap the endowment for current spending, it typically covers something like two or three percent of the budget.

The “Program Fund”—the largest of the sub-categories within the endowment, and the only one available to support the annual budget—was about \$580,000 at the end of 2013, as indicated in last year’s annual report. (For a sense of comparison, the core endowment for First Parish in Cambridge is over \$8 million, and endowment payouts cover about a third of that congregation’s budget.) It is not feasible for an endowment this small to invest in shares of

individual companies. Instead, it holds several mutual funds that bundle together a variety of separate stocks. Thus our endowment, unlike First Parish Cambridge and many other churches that have taken the lead in divestment, has never had any *direct* investments in fossil fuel companies to purge. However, 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 choices before us This long-term planning process is an excellent opportunity to decide whether to eliminate these investments. Selling off mutual funds that contain fossil-fuel stocks is very unlikely to reduce the resources available to fossil-fuel companies. Such companies are rarely dependent on new equity issues to fund operations, and in any event securities sold by Follen will be bought up by other investors. So divestment cannot be expected to have a *direct* impact on carbon emissions. But it may have an important *indirect* impact. It would symbolize our opposition to the grave threat posed by climate change to so many fundamental UU values. In particular, it would put us on the list of churches and other organizations maintained by the environmental group 350.org<sup>4</sup>. As that list grows, the scale of the constituency concerned about climate is dramatized for local, state, and national officials, potentially encouraging them to make the hard choices required to reduce carbon emissions. And whether or not there are practical benefits to divestment, some Follenites consider it a moral imperative to sever our connections to the production and use of fossil fuels as quickly and completely as possible.

Unfortunately the fossil-fuel-free mutual funds currently available to Follen are relatively few, relatively small, and feature somewhat lower returns—adjusted for risk—than the conventional funds that make up the endowment today. So divestment would likely come at a cost. Unless and until the investment disadvantages of fossil-fuel-free mutual funds are remedied, divestment would mean slower growth of the endowment for the future, smaller endowment payouts for current spending, or both. Parish Board members with relevant expertise generally believe that fossil-fuel-free investment options are likely to improve in the coming years. For now, however, we face a choice between putting the priority on the signals we send with our money, or the work that we do with that money. Likewise, we face a choice over whether any sacrifice divestment entails should be borne by ourselves or passed on to the future. Since the differences in return are not enormous<sup>5</sup>, and since endowment income is a minor share of Follen's budget, it is important to note that this sacrifice would be modest even in the worst case. And if it turns out that the Trustees are able to eliminate fossil fuels from the endowment *without* any reduction in returns, these dilemmas disappear.

Please consider and be prepared to indicate whether, and to what degree, you agree or disagree with each of these alternative statements about Follen's endowment. Two of the statements envision divestment and one envisions retaining fossil-fuel investments but earmarking the proceeds to fund climate action. In one of the divestment options the sacrifice in return—if any—would be borne by current Follenites; in the other that burden is passed on to the future. The two divestment options also differ in that one of them sets an expectation that

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<sup>4</sup>This list can be found at <http://gofossilfree.org/commitments/>

<sup>5</sup> An analysis of returns for the 2003-13 period indicates that Follen's actual 2013 portfolio of US equity funds—the largest category of funds in the endowment—earned an average of about 7.5 percent over the period, while the best available fossil-fuel equivalent had an average return of about 6 percent.

individual Follenites will also eliminate any direct or indirect fossil-fuel investments from their own retirement, education, and other savings, while the other does not. Both envision divestment taking place in stages, to be completed within five years of this long-term plan coming into effect at the start of the next church year. And both define divestment as the elimination of mutual funds with holdings in any companies on the “Carbon Tracker Initiative” list of 200 fossil-fuel companies.<sup>6</sup> This could be achieved by shifting the endowment into the UUA’s Common Endowment Fund, which is itself divesting, or by transitioning from conventional to fossil-fuel-free mutual funds.

*Long-Term Plan Open Question 2A:* “I believe that we should divest our endowment of fossil-fuel holdings over the next five church years. I also believe that divestment sends the strongest signal about our commitment to reducing climate change if we do not push any requisite sacrifice onto the future. As Program Council and Parish Board consider the appropriate endowment payout for each coming year’s budget, they should take into account the past year’s sacrifice in 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.”

*Long-Term Plan Open Question 2B:* “I believe that we should divest our endowment of fossil-fuel holdings over the next five church years. As with the prior option, Follen’s endowment should be divested in stages, to be complete within five years after this long-term plan goes into effect. Meanwhile, we should direct an appropriate share of the endowment to investments that will support a swift transition to a clean-energy economy. This shift should not be impeded by concerns about the endowment’s investment returns. Parish Board should publish updates in each year’s annual report detailing progress toward complete divestment. Unlike the first scenario, Program Council and Parish Board will not be expected to limit endowment payouts to ensure that reductions in investment returns, if any, do not undercut growth for the future. Also unlike the first scenario, I believe that in addition to the congregational divestment that is formally recognized by 350.org, Follenites should urge each other for moral reasons to eliminate fossil-fuel holdings from our retirement funds, education funds, and other personal investments.”

*Long-Term Plan Open Question 2C:* “I believe we should use the investment returns from fossil fuel holdings to finance a campaign of climate-change activism. Instead of purging the endowment of mutual funds with fossil-fuel holdings—which would have the real but limited benefit of getting our name on the 350.org list—the Trustees will each year estimate the gains in the value of the endowment specifically attributable to holdings of fossil-fuel companies. These gains will be dedicated to a Follen climate-change action fund, which can be used for appropriate spending such as converting the church to sustainable energy sources and educating Follenites and the broader community about opportunities for reducing carbon emissions.”

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<sup>6</sup> The Carbon Tracker 200 is a commonly used roster of the world’s major fossil-fuel companies.

Again, please reflect deeply on these alternative statements. You will have an opportunity to indicate your degree of agreement or disagreement with each.

## VI. Open Questions on growth and staffing

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

*Growth:* 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 not been much growth in membership or pledge units, which are roughly where they were a decade ago. But other measures—the unprecedented size of the Junior Choir, record numbers in the FUUY youth group, sustained 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 reflected in the formal tallies of members and pledge units.

There is much to celebrate in this trend. Two of the “new realities” rated as the five most significant in the 2014 survey were broadly positive aspects of Follen’s expansion. At the most basic level, we celebrate 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 is not an unalloyed blessing. Services are sometimes crowded. We had to add an additional Christmas Eve service this church year to avoid turning people away. New members and friends may not initially make major pledges, and there is a risk that the financial burdens of growth will rise faster than the financial benefits. Some Follenites are concerned that growth could dilute important aspects of our community’s special culture and tradition.

Please consider and be prepared to indicate whether, and to what degree, you agree or disagree with this statement about growth.

*Long-Term Plan Open Question 3:* “Our congregation is vibrant, warm, and spiritually deep, and I wish to share these gifts with others who are looking for a religious home and friendly community. We should joyfully welcome newcomers and connect them to all our congregation offers. While it presents undeniable challenges, I believe that 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.”

*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 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. But others consider volunteering to be fundamental to our identity and a core means by which we build and express our faith tradition. Any significant shift toward paid staffing, in this view, could undermine a key aspect of Follen culture.

Please consider and be prepared to indicate whether, and to what degree, you agree or disagree with each of these two alternative statements about staffing.

*Long-Term Plan Open Question 4A:* “While volunteering should always remain important, I believe a significant incremental shift<sup>7</sup> 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.”

*Long-Term Plan Open Question 4B:* “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.”

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<sup>7</sup> For purposes of this question, assume that a “significant incremental shift” toward paid staffing means one additional full-time equivalent church employee plus an increase in hiring contractors for various short-term tasks, at a fully-loaded annual cost of between \$60,000 and \$100,000.

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

In this summary we indicate **in bold** those items that seem to us conspicuous areas of accomplishment since 2009, indicate in regular font those items displaying substantial but arguably incomplete progress, and *in italics* those items where that has so far been some, but limited, momentum.

### 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  
Results of 2014 Task Forces on “New Realities” and Subsequent Congregational Survey

Narrative for rating	Numerical equivalent
<b>Little Attention in the Plan Update</b>	1
<b>Moderate Attention in the Plan Update</b>	2
<b>Significant Attention in the Plan Update</b>	3
<b>Major Attention in the Plan Update</b>	4
<b>Maximum Attention in the Plan Update</b>	5

First Five Items	
Item	Mean Rating
Climate Change: The rising of the earth’s average temperature threatens significant and dangerous shifts in climate and weather. This development may warrant attention in Follen’s five-year plan so that we can make choices that affect the amount of greenhouse gases we put in the atmosphere in the near future and for years to come.	3.77
Violence Close to Home: Multiple mass shootings in the past five years, including the shooting of 20 children and 6 adults at Sandy Hook elementary school, have deepened Americans’ interest in protecting our communities from the threat of gun violence. Gun-related suicide compounds this issue, as we seek to understand, prevent, and respond to gun violence. Likewise, the Boston Marathon bombings of 2013 shook the country and heightened public awareness of the growing threat of so-called “homegrown” terrorism. Acts by radicalized U.S. citizens have increased, raising questions about public mental health, counter-terrorism, and the ways in which faith traditions relate to this issue.	3.53
Diversity Intermingled: There is a new inclusive and positive energy, with long time congregants welcoming new folks, and the old and young mingling. Singles, empty nesters, families, children – all are more likely to interact and volunteer together.	3.36
Growth in Scale and Forms of Congregational Engagement: Team memberships, pledges, and attendance at worship services are up significantly. Most particularly, our covenant groups today have 13 groups, 24 leaders, and approximately 130 members, which is about 40% of the church membership. Perhaps as many as one-quarter of people in covenant groups rely on these meetings as their primary source of spiritual engagement, i.e., faithful covenant group meeting attendance and sporadic church attendance. The most significant change in the last five years is that covenant groups have gone from being totally minister-led to completely lay-led, although with continued reliance on the minister’s support, advice, and guidance. Other changes include an annual retreat for leaders, and the formation of two leaders’ groups which process sessions at their leaders’ meetings in much the same way as regular covenant groups.	3.16
Middle Class Under Siege: The unemployment crisis has magnified concerns about income inequality, the minimum wage, and access to home ownership. Upward mobility appears to be threatened as the long-term unemployed find few opportunities to apply skills that have eroded due to a lack of work and an absence of pathways to address this trend.	3.08

Second Five Items	
A Time of Stock-Taking: There has been an extensive self-appraisal, inaugurated by the interim ministers, the search committee, and the new minister herself.	3.00
Widening Access to Education and Economic Resources: Three billion people, almost half of the human beings on the planet, live on less than \$2.50 day. According to UNICEF, 22,000 children die from hunger and disease caused by poverty each day. 130 million youth are not in school and thus are deprived of opportunities to improve their lives. Issues of illiteracy, poverty, and inequality may merit the attention of Follen's five year plan so our community can take action to widen global access to economic resources, health and education.	2.971
Religious Tolerance/Co-existence: In recent years, religious intolerance has grown both in the U.S. (particularly against Muslims in the post-9/11 era) and in worldwide conflict zones beset with sectarian violence. At the same time, religion itself increasingly has been invoked to justify discrimination - notably discrimination against LGBTQ people and women seeking to access reproductive health care. These developments may warrant attention in Follen's five-year plan so that we can develop appropriate Follen community responses to growing religious intolerance in our community and worldwide.	2.97
Empowerment of Adolescent Girls: Gender inequality jeopardizes adolescent girls' access to education, reproductive rights, and freedom to choose when and who to marry. 70% of the world's 130 million youth out of school are female. 82 million girls between the ages of 10 and 17 will be married before their 18th birthday; and each year 5.5 million girls aged 15-19 give birth, 65% of whom are married. Reproductive freedom, empowerment, and education of girls as an alternative to child marriage, merit Follen's attention over the next five years so our community, especially our youth, will imagine and work toward gender equality.	2.94
International Human Rights for LGBTQ People: UU's work to support the rights of all people, regardless of their sexual orientation or gender identity, to enjoy the full range of human and civil rights without exception. However, every day, across the globe, sexual orientation or gender identity leads to abuse in the form of discrimination, violence, imprisonment, torture, or even execution. There are numerous recent disturbing examples in Uganda, Russia and Nigeria of state-sponsored criminalization of sexual orientation and gender identity, and censorship of LGBTQ people and their allies. These developments may warrant attention in Follen's five-year plan so that we can develop appropriate Follen community responses to escalating human rights abuses based on sexual orientation or gender identity in the US and worldwide.	2.88

Third Five Items	
New Services: We have instituted family services, in addition to our “intergenerational” services.	2.79
Increasing housing costs: The median home value in Lexington which was \$300,000 in 1990, or 1.75 times the state value, has increased to \$700,000, or 1.85 times the state value in 2007. However, one in five households earn below 80% of the media income and over 30% of households are cost burdened, meaning they spend over 30% of their gross incomes on housing. Additionally, the Lexington Interfaith Clergy Association (LICA) has reported on homeless families living in transitional housing at the Quality Inn in Lexington.	2.78
Food Safety and Sustainability: Concern for sustainability and awareness of food supply issues have increased markedly, bringing to life questions about food security (availability, affordability, and safety), local sourcing, agricultural methods, and GMO policy. Increased understanding of these issues calls into question whether we are doing all we can in our everyday lives to promote sustainable practices.	2.69
Upgrading the Physical Face of Follen: Our buildings and grounds have experienced a facelift.	2.67
Challenges in racial and ethnic engagement and understanding: In addition to the increase in the Asian population, the number of Black/African American residents has grown slightly from 343 (1.1%) in 2000 to 473 (1.5%) in 2010. Meanwhile, the percentage of African American students enrolled in the public schools has fallen from 5.5% to 4.3%. The Metco Program brings students from other cities into Lexington to “expand educational opportunities, increase diversity, and reduce racial isolation.” However, it has been observed that the Metco students are often socially separated from the local residents at Lexington High School.	2.64

Fourth Five Items	
Aging of population: While Lexington’s population has not changed substantially over the last 30 years, its age distribution has. It now more closely resembles suburban communities with highly rated school systems. There is a significant dip over the last 20 years centered on the 25-29 year old range and a significant increase centered on the 50-54 year old range. An interpretation of this put forward by the Lexington 2020 Vision Committee is that “older parents move into Lexington to place their children in its excellent schools, while young adults move elsewhere.” The median age has increased from 43.7 in 2000 to 45.6 in 2010. The rise in median age is predicted to accelerate over the next 20 years.	2.46
Geography and economic disparity: The median household income for Lexington between 2008 and 2012 was \$138,095, or 207% of the Massachusetts value of \$66,658. During the same period, the median incomes for Arlington and Waltham were \$87,525 and \$72,332, respectively.	2.36
Increasing Asian population: The Lexington 2020 Vision Committee reports that the Asian population in Lexington has increased from 6% in 1990 to about 19.9% by 2010. This is substantially higher than in neighboring communities and is only surpassed in Massachusetts by Quincy at 24.0%, and Lowell and Malden at 20.0%. This trend has increased the number of English language learners in Lexington schools and the number of Asians in subsidized housing.	2.35
Accelerated Technological Change: Smartphone adoption will likely reach 90% in the next two years, around the same time that Facebook will include one-half of the U.S. population. The “SoMoLo” (social, mobile, local) trend is changing behaviors, upending business models, and challenging all aspects of society to address the implications of the emerging digital world. Meanwhile, automation of work is moving beyond the four walls of the factory. It may soon be commonplace for machines to fly airplanes, to drive cars, to serve customers, and to regulate the daily tasks of our homes and our lives. This can liberate us from menial tasks; it also can displace workers and foster new weaponry for state / non-state actors.	2.09
Balancing Privacy and Security: The capacity of the national security state to monitor U.S. citizens was brought to light by recent disclosures. This highlights the trade-offs between privacy and security; a challenge exacerbated by the power of new technologies. In a digital world, we will be forced to confront these questions more and more each day.	2.07