

Focus the Beacon's Strategic Plan 2010

Background

In 2006/07 the Board empowered the Crystal Ball Committee to develop a plan for our property and building. The team concluded it could not fulfill its mandate without a mission and vision statement to guide its recommendations. In 2008/09 the Kindling the Flame Team developed a Mission and Vision Statement (see Appendix A) which was approved by the congregation September 2009. In Fall 2009 the Focusing the Beacon Team was charged to develop a strategic plan in the areas of program, outreach, human resources and facilities using the Mission and Vision Statement as its guiding document.

Theological Center

Unitarian Universalism is a transformative religious tradition. We advance transformation through mutual covenants with one another, based on love and trust, and our own individual covenants with the divine. We are called to find meaning together, to help and care for one another, and to serve the common good, so we can all connect with something greater than ourselves. We do this by providing the highest and best opportunities for engaging worship, collaborative learning, and social action, as echoed by our very mission statement; indeed, our recommendations are founded on these defining elements. Moreover, we offer a plan that we believe makes possible the aspirations set out in our vision statement. To be that beacon, remain on the path to wholeness, and really make a difference in the world, we must do everything we can to nurture the unique contributions and gifts that our members can provide, not only to our Emerson community but to the world beyond our doors. Our growth will continue to provide ever more broad and deep ways of realizing our full potential, but only if we ensure the quality of the resources that support such hope and promise. Very intentional consideration of the ways we can achieve and maintain the strongest and most robust of leadership resources and facilities going forward informed our recommendations throughout. We recognize that change is a fundamental part of institutional growth, just as much as change is a necessary part of personal and spiritual growth. We are also aware that change is never easy, but neither is our calling, or our vision. We call it transformative work, not transformative play. It is to that end that we aspire, and offer this plan.

Our Assumptions

We assume that, over the next few years, Emerson Chapel will continue to grow at a rate similar to that defining our recent past, and that the majority of members respect this need for growth. Current growth rates suggest we could double our size about every 7 years. We assume that current growth means we're already doing some things well and that some of our recommendations are already happening. We assume a desire for a more integrated and spiritual experience that supports individual and congregational growth. We assume that most of our members desire meaningful involvement in the congregation. We assume that our pledge units will increase as our membership increases. For our purposes, "member" indicates everyone involved in the congregational including children, youth and friends. In these recommendations year 1 begins July 1, 2010. Unless otherwise noted, all recommendations begin in Year 1.

Our Guiding Principles

Emerson has, in the last 10 years, moved from a family size (less than 50) to a pastoral size (50-150) church. It is now moving towards "Program Size" (150-300) (See Appendix B). Research and documented experiences from similar churches show that successful transformations from Family to Pastoral to Program require fundamental changes in the operation of the church. All recommendations herein support these transitions. At the same time, we remain responsive to the concerns addressed by our members and committees. We recognize that some cultural elements of family-size church remain and, indeed, the need to ground Emerson more firmly in a pastoral size church model right now is woven into many of our near-term recommendations. We feel a better awareness of these operational models is important with respect to ensuring that we are prepared to embrace its transformation into a Program-Size church.

Our Process

The Focusing the Beacon team first engaged in self-education. We read church theory on the stages of church growth, factors that impact growth, leadership and governance structures, and strategic planning itself (See Appendix B). We educated ourselves in our church's history and the previous strategic plan. We then engaged members of the congregation and staff in interviews and committee discussions. This outreach effort allowed us to connect with approximately 70% of the congregation. Our resulting recommendations were developed by drawing together all of the data from the research and outreach.

Our Recommendations – Programming

Background

As the congregation grows, we are seeing more and more diversity in members and there is a call for specialized programming to meet their needs. Increased diversity in small groups and support at all levels is essential to attract more diverse people and to keep current members engaged. In a Program Size church the challenge is to maintain a central unifying mission and vision while responding to growing diversity and need.

Worship Recommendations

1. All ages worship is working well. We recommend continuing this effort.
2. Shift how we track Sunday attendance to gain an accurate assessment. Count adults, youth and children in worship (including Children's Chapel) and Sunday RE. Reports should indicate minister vs. non-minister Sundays.
3. Secure hymnals and chairs to bring sanctuary to capacity; secure hearing assistance for those who require it.
4. Dedicate funding and human resources to improve non-minister Sunday experience which includes the training of members to deliver internal lay-led sermons and provide adequate funding for special topic external speakers.
5. Recommend all Sunday focused committees and volunteers work together to improve the Sunday "door to door" experience.
6. Continue to identify and draw on the musical talent and abilities of members and friends.
7. Move to year round full worship services in two years or less.
8. Be prepared to move to two services when attendance reaches 75% capacity on minister Sundays for 8 consecutive weeks.

Religious Education Recommendations

1. Continue and promote and hold sacred the RE hour after service as integral to the Sunday experience.
2. We recommend expanding the mandate of Adult RE beyond Sunday morning to include all Adult RE sessions and classes.
3. Recommend an update to the RE classrooms so they may be more suitably used for Adult RE classes as well as children's classes.
4. Place covenant groups within the mandate of Adult RE.
5. Develop a comprehensive approach to RE offerings which will include time limited series, special one day intensives, special topics centered on faith practices and education related to social outreach initiatives as appropriate for age group.
6. Work with all Sunday focused committees to provide an integrated Sunday morning experience.
7. Recommend updating job/role descriptions for all RE committee partners so everyone understands their duties and time commitments.

Congregational Social and Fundraising Activities Recommendations

1. Creation of a committee to oversee and coordinate the social and fundraising activities of the church associated with congregational life.
2. Develop and publicize "how to" instructions for all social and fundraising events.

Pastoral Care Recommendations

1. Develop a lay pastoral care associates program which will allow the congregation to assist the minister with the pastoral care of its members as the congregation grows into a program size church.
2. Support our minister in obtaining the training required to implement this program.

Our Recommendations – Outreach

Background

Based upon the feedback we received, the congregation has a somewhat mixed commitment to social justice. Some see social justice/congregational stability as an either/or; take care of your own house before committing to outreach. Others see them as integral and interrelated; taking care of your own house includes outreach. A growing number of members strongly desire an increased community presence and commitment to social justice and are willing to give of their time, talent and money to do so. In addition, research shows that churches that demonstrate this commitment grow steadily. Our recommendation is to empower those individuals to develop a sustained social justice ministry that will carry us into the Program Church Model.

Outreach Recommendations

1. Splitting the Plate is working well.
 - a. We recommend donating the entire plate to our organizations.
 - b. We recommend choosing one outreach organization per quarter rather than one per month so as to deepen our engagement with particular social justice ministries.
 - c. Integrate support for our organizations with programming in Adult and Children's Religious Education and Worship and by building direct human relationships with the organization. Make the organization real within the church and make us real to our community partners.
2. Empower those committed to the Love First Project with its focuses on LGBTQ Equality and Reproductive Justice to develop sustainable outreach ministries in those areas. Integrate these ministries with our quarterly outreach partners.
3. Identify leadership within our current Love First Groups that can represent these ministries at Program Council thus integrating Social Justice into the governance structure of the congregation.
4. Intentionally integrate Love First and our quarterly outreach partners with Children and Youth and Adult Programming.
5. Continue to recognize the importance of the Emerson website for attracting visitors and for members to stay current with news and events by creating a time limited committee to review and make recommendations regarding the look, feel and usefulness of the website for the various church needs with the assistance of Emerson's website coordinator.

Our Recommendations – Human Resources

Background

We were empowered by the board to address staffing needs. We concluded this was too narrow so we expanded this mandate to include paid staff and volunteers. To move into the Program Church size, we will require commitment to staffing increases and also to intentional lay leadership development. In a successful Program Size church, power and influence shifts from the board/minister partnership to the program council/minister partnership. The majority of decisions are made by the committees. The role of the board is to support the committees by ensuring financial resources and maintaining the governance structure that empowers the committees to do the work of the church. The role of the minister is to train the lay leaders and to work closely with the board and committee chairs to ensure that our ministries remain true to our mission and vision.

Staffing Recommendations

1. Restore the minister to full time as a first priority. We cannot fully be the pastoral church nor be prepared to move into program size without full time ministry.
2. Support the minister in obtaining the education training needed to guide our transition into a Program Size Church.
3. Increasing the hours of the office administrator position to ensure that our staff and committees have the administrative support they need.
4. Make an intentional transition from considering paid staff 'employees' to considering them 'partners' by empowering them in their roles.
5. Ensure staffing levels are consistent with UUA guidelines.
6. Maintain appropriate staffing levels as recommended by the UUA in such a way that we are staffed for growth.
7. Standardize and document all church processes and procedures.

Lay Leadership Recommendations

1. Development of a volunteer ministries/volunteer coordinator position whose role would be to work with the minister to identify member talents, goals, leadership capabilities and spiritual callings so as to develop new ministries and sustain existing ministries.
2. Establish ongoing lay leadership education about the transition from Family/Pastoral/Program so that key lay leaders understand the dynamics of the transition and the expected institutional tension.
3. In Year 2 we recommend the establishment of a Leadership Covenant Group led by the minister that will offer ongoing leadership development for key leaders.
4. Establish of a monthly Committee Night so that all committees have the opportunity to meet at the same time at Emerson Chapel.
5. Define term limits for leaders and/or limits on the number of volunteer positions per individual. This will ensure ongoing opportunity for involvement and sharing of authority.
6. Develop job descriptions for each committee and the recording of procedures to ensure ongoing transfer of knowledge to new leaders.
7. Creation of a committee to oversee and coordinate the ongoing care of existing members.

Our Recommendations – Facilities

Background

It was abundantly clear in our congregational conversations that our facility and property are uppermost in the minds of many long term members. Even newer members are aware that the old building is cramped and less than appealing. We also recognize that the entire strategic planning process was launched by a desire to make a decision about whether to stay or leave our current residence.

There are three options to consider:

1. stay and build a new facility
2. stay and demolish the old building and add on to the existing sanctuary
3. sell and move

It was clear that the majority of members prefer option 2, which is very understandable. There is a clear attachment to our current location with its 3 ½ acres and quiet residential feel and the direct experience many members have with the decision 10 years ago to construct our sanctuary.

However, it is the recommendation of the Focusing the Beacon Team that we seriously consider option 3 over the next 1 – 3 years as this may be the most fiscally advantageous to us. The following is our reasoning:

Residential property values plummeted two years ago. They are slowly regaining value. Our property would likely be sold to a residential developer. In two years it is possible that our property may regain much of its value. Churches are considered commercial real estate, and commercial real estate values are decreasing now and this decrease is expected to continue over the next two years. Therefore, the possibility exists that we could sell our residential property high and buy commercial property low. As such, it may be more financially advantageous to monitor the real estate market and be prepared to move in 1 to 3 years if a church that meets our needs comes on the market, rather than tear down and build new at our current location.

Recommendations

1. Year 1 - Monitor current residential and commercial property values and establish decision making criteria for a decision to stay or go.
2. Year 1 and 2 - Establish a building and grounds committee with a combination of newer and longer term members to make decisions regarding minimal levels of maintenance to ensure the safety and health of our members.
3. Year 2 and 3 - Based upon decision making criteria established in Year 1, make a decision to either place the property up for sale or organize a campaign to demolish old building and expand our facilities to meet our operational needs.

With that being stated, there are still many things the members of Emerson Chapel can do in the near term to make the facilities more inviting and pleasing. However, projects which require significant capital should be avoided unless there are other extenuating circumstances, such as a health concerns.

Our Recommendations – Implementation

Our recommendation regarding implementation is simple. We believe Emerson is ready to transition to the governance style of successful Program Size churches. In line with the Program Church Model, we recommend strengthening and empowering the committees to make decisions regarding the ongoing ministries of the congregation, including the implementation of these recommendations. Program Council should become much stronger and replace the Board as the hub of decision making.

We recommend that the Minister develop strong relationships with the Committee Chairs and engage in active leadership development at all levels so as to maintain our human resources and to ensure that our leaders and our ministries remain faithful to our mission and vision. This connection and coordination will likely take place during Program Council.

Our congregation's culture will need to be reshaped in regards to decision making power. At this time, the Board of Trustees functions as a working board, very much in line with the Family Size Church way of making decisions, and is seen as the highest and strongest authority. For example, people are encouraged to go first to the board when they have an issue or concern or idea. Given our recent rate of growth, this manner of operating is likely to quickly become unworkable and, if continued, will hinder Emerson from being fully functional even in its current Pastoral size. In addition, it will certainly prevent our congregation from becoming a program size church.

We would encourage that a core component of every Board meeting involve discernment regarding proper role. For every item that comes to the Board, we recommend a transparent discussion about what the Board's proper role is regarding this item. We encourage the Board to use an empowerment model and to work to strengthen the committees so they are in the best position to make the decisions regarding the ministries of our church.

We suggest that one way to start is by visually reorganizing the vestibule to reflect new systems of decision making. We recommend that prominence be given to photos of our current committee chairs and minister, and that the Board pictures rest along side rather than over the committees.

We also recommend decreasing the required number of board members from 7-9 to 6-7 in Year 2. In the transition to Program Size a large working board is not as necessary. In fact, it can hinder the transition as it limits potential leaders from being available for other church's ministries through Program Council and Committees.

Some of these recommendations may take place very quickly. In fact, some of these initiatives, once identified, are starting to be implemented now –ahead of our recommendations. However, the Focusing the Beacon Team recognizes that for the most part, this will be a long transition and most of these recommendations will not happen overnight. We feel very strongly feel their implementation will be worth the time and effort. We also believe Our UU Faith, Mission and Vision asks no less of us.

It has been an honor to serve you. We humbly submit this report for your consideration and approval.

Respectfully,

The Focusing the Beacon Team

(Chair) Shawna Lyonfields, Andrew Dickson, Mark Fish, Jeff Gidday

Appendix A

Emerson Unitarian Universalist Chapel

Transforming ourselves • Our community • Our world

Mission Statement

Our mission is to provide a liberal, welcoming community that nurtures people on diverse spiritual paths through engaging worship, collaborative learning, and social action.

Vision Statement

Guided by the Seven Principles of Unitarian Universalism, Emerson Chapel will be a beacon of liberal religion and service, recognized in our community as a source for stimulating spiritual, social and intellectual interaction. We will develop and maintain exceptional human, financial, and building resources to provide opportunities for lifelong learning, active social outreach, meaningful community fellowship, and deep spiritual exploration

Appendix B

Church Size as Indicator of Organizational Structure Based on the work of Alice Mann

The Family Church: up to 50

Everyone knows everyone else; members are very devoted and hardworking; usually homogeneous; ministers (if there is one) are often part-time and have close, pastoral relationships with members; board run much of day-to-day life; leadership is group centered.

The Pastoral Church: 50–150

More diversity exists; members usually notice newcomers; look to minister for leadership; expectations of minister are high; minister highly involved in many activities and programs; leadership consists of minister and small group of lay leadership; board operates like a committee, with involvement in daily operations.

The Program Church: 150-350

Many paths to membership; many interest groups, committees and programs; newcomers may find it more difficult to feel attached; minister is seen as leader and provides continuity across program areas; minister leads other staff and lay leadership; lay leaders minister to one another; decision making broadly distributed; complex organizational structures require attention to purpose and identity.

The Corporate Church: 350+

Sophisticated visitor and new member systems; leaders generate energy and enthusiasm; members must find a place in a smaller group/program or feel disconnected; minister is often head of staff; minister provides pastoral support to leaders; multilayered structure of staff, boards and committees; staff involvement in leadership of most groups/programs.