ABRAHAM LINCOLN UNITARIAN UNIVERSALIST CONGREGATION
LONG RANGE PLANNING 2016

FINAL REPORT

PRESENTED DECEMBER 2016
ALUUC Long Range Planning Committee

Debby Hagan, Co-Chair
Carol Kneedler, Co-Chair
Gwen Childs
Kurt DeWeese
Stu Jacobsen
Frank Kopecky
Dianne Roberts
Posy Robertson
INTRODUCTION

The Abraham Lincoln Unitarian Universalist Congregation started long range planning in the fall of 2015 by engaging consultants from the MidAmerica Region who recommended a process that several Midwest congregations had used successfully. After two workshops with the consultants, ALUUC conducted cottage group meetings in February and March 2016 for congregants to talk about stories, themes, and actions that illustrate what ALUUC does well and to share their dreams for ALUUC’s future. 103 people participated in 11 groups.

From the content gathered in cottage groups, the Long Range Planning Committee created five Strategic Visions that are meaningful to ALUUC, grounded in the best of the past, and describe a challenging but achievable future.

Those Strategic Visions covered five major areas of congregational life, including:

- Inreach to the congregation,
- Outreach to the larger community to share our welcoming and accepting beliefs and our pursuit of social justice,
- Personal growth through enrichment programming,
- Meaningful, life-affirming and life-changing services, and
- Stewardship.

In July, August and September, the board, staff and committees submitted specific goals to implement the Strategic Visions and to be considered for action within next 10 years. Detailed goals are presented on pages 4-7.

In October, the committee presented the Visions and Goals at a Sunday service and asked for more goals from the congregation. In all, 17 goals were presented along with the Visions at a congregational meeting in November, where the Visions were adopted.

106 members prioritized the 17 goals to determine which would be implemented first. Results of the prioritization are on pages 8 and 9.

The Board considered the prioritization in December, and the committee presented this final report at the end of 2016.
STRATEGIC VISIONS & GOALS

The ALUUC Membership adopted five Strategic Visions as statements of our Congregation’s intent for the future of our community at a congregational meeting on November 13, 2016. Grounded in the Congregation’s recollections of the best of ALUUC, expressed in these visions is much of what we love about our community. Because the Strategic Visions are inspired by our hopes of the future, they are aspirations for what ALUUC could become. Stated in the present tense, they inspire us to envision now what we will become and serve as a reminder of our intent and a yardstick for our progress.

Our Strategic Visions will be made real over time by implementing goals related to each vision. 17 goals were prioritized by congregation members in November.

This report from the Long Range Planning Committee to the ALUUC Board of Directors presents the five Strategic Visions, 17 goals, and goal priorities from the congregation with initial implementation ideas from the Committee. The Board is encouraged to evaluate goals, to identify goals to be started within the next 18 months and to begin implementation of those goals with the understanding that future boards will implement additional goals.

INREACH TO THE CONGREGATION

We are an inclusive, diverse Unitarian Universalist community that cares for all members and friends, with loving intent and in covenant of right relations, consistent with our welcoming and accepting beliefs and those of our denomination.

GOALS

Increase effort to make ALUUC a Truly Welcoming Congregation [3rd in vote priority]
Increase diversity of membership and representation throughout our community, particularly within leadership of ALUUC. Review and update bylaws for inclusion (gender neutral language, sensitivity, etc.) Review church practices and identify and implement changes to be more Welcoming. Host a community workshop on classism within one year, based on www.uuclassconversations.org and invite nearby UU congregations to participate; fund the effort with registrations and support from ALUUC's budget. (NOTE: The broader definition of a Welcoming Congregation, as approved by the Board in April, 2016, is "We affirm and promote the full participation of persons in all our activities and endeavors without regard to race, religious/non-religious persuasion, color, gender, physical or mental challenge, political persuasion, affectional or sexual orientation, class or national origin.")

Transportation to church [4th in vote priority]
Evaluate needs and plan transportation to ALUUC for those who need it. This could be through Uber, taxis, providing a driver and van, or organizing volunteers.

Membership Coordinator [11th in vote priority]
Expand current Membership Coordinator responsibilities and work hours to: 1. Re-integrate members who no longer participate and encourage continued participation for current members and friends, 2. Integrate new members into the ALUUC community, and 3. Identify and grow new leaders to serve the ALUUC community.

Mission Statement [15th in vote priority]
Review, and rewrite as necessary, to determine if the Mission Statement reflects the current beliefs of the congregation and is brief enough to remember and share with one another and the larger community.
OUTREACH TO THE LARGER COMMUNITY TO SHARE OUR WELCOMING AND ACCEPTING BELIEFS AND OUR PURSUIT OF SOCIAL JUSTICE

We promote and follow Unitarian Universalist beliefs and principles through the practice of an exciting, energetic and well-organized social justice, social action, and environmental mission that engages the passion of our members/friends and attracts others to join us in making the world a better place. As a UU congregation located in Illinois’ seat of government, we take advantage of the opportunity to influence public policy in ways that reflect our mission. Together with other community organizations, we serve as a resource to the wider community on social justice and environmental issues.

We offer an accepting and welcoming home so that others feel free to join us and express the fullness of their gifts and ways of being in the world.

**Goals**

**Speaker Events** [6th in vote priority]
Create a Public Speakers Program and invite well-known speakers on topics of interest to the wider community and nearby UU congregations with a goal of sharing our values and our commitment to social justice and environmental stewardship.

**Social Justice Coordinator** [7th, 8th, 9th (tie) in vote priority]
Create a professional position to coordinate social action and social justice programs. The Coordinator will work with adult and youth volunteers to strengthen the engagement of members and friends of the congregation in social justice activities.

**EcoCamp** [10th in vote priority]
As part of our social justice and environmental stewardship emphasis within the congregation, recognize EcoCamp as one of ALUUC’s signature community projects; allocate a budget line to fully fund camp activities, estimated at $4k/year.

**Paid advertising** [12th in vote priority]
Create a marketing campaign with paid advertising, using budgeted funds, targeted to the community-at-large to bring our message of acceptance, inclusiveness and support of many spiritual paths to those who need it. The campaign will include evaluation of results that are used to refine future campaigns.

**Springfield Community-Wide Children's Choir** [16th in vote priority]
If a Children's Choir is organized at ALUUC, it will be expanded to the broader Springfield area to offer Children's Choir across different congregations; partner with the Faith Coalition for the Common Good.

**International Mission** [17th in vote priority]
Expand our mission internationally by renewing contact with our partner church in Transylvania and the UU Partnership Church Council.

PERSONAL GROWTH THROUGH ENRICHMENT PROGRAMMING

We provide a provocative and exciting enrichment program for all ages through engaging and thought-provoking experiences for participants. Through these programs, we share our values with the wider central Illinois community.

Our religious education program for children and youth is high-quality and consistently well-attended. It serves as a primary appeal for new families. Our programs educate our children and youth about other cultures, religions and ethical ways of being in the world.
GOALS
Lifespan Enrichment Programming / Religious Education [5th in vote priority]
Expand ALUUC's RE program to educate all ages, including regularly scheduled adult
enrichment programming such as UUA-based adult curriculum and classes as well as
workshops, guest speakers, chalice groups and circles, a writer's group, an art group, a
poetry group, and other small group ministries. Employ a full-time credentialed
Director of Religious Education (DRE) for both children and adult enrichment
programming, with compensation in accordance with the UUA guidelines.

Our Whole Lives (OWL) Lifespan Sexuality Education [13th in vote priority]
Expand OWL as part of the current Religious Education curriculum rotation at all grade
levels (with Unitarian Universalism and World Religions), including adult OWL
seminars and workshops. Train more OWL facilitators for K-12th grade and adult and
purchase additional OWL curriculum.

MEANINGFUL, LIFE-AFFIRMING AND LIFE-CHANGING SERVICES
We create meaningful, life-affirming and life-changing services to educate, to provide comfort,
and to celebrate life's transitions, such as Sunday and other worship services, weddings,
memorial services, and child dedications. These services, inspired by our beliefs and principles,
integrate a wide variety of topics, including social justice, environmental concerns, and personal
and spiritual growth.

GOALS
Increase and enrich our music experience [14th in vote priority]
Develop an expanded choir that sings more frequently. Include more instruments in our
current musical performances. Expand songs for Sunday congregational singing.
Implement a children's choir with scheduled rehearsal and performance times
coordinated between the Religious Education Committee, the Choir Director and the
Program Committee. Expand the responsibilities and work hours of the Music Director.

STEWARDSHIP
We are careful stewards of our physical and spiritual assets. We make wise, intentional choices
about using our staff / volunteer time and talents, as well as our financial assets and property in
ways that support our mission and strategic direction. We preserve and use our assets to
maintain our presence for future generations of UUs in central Illinois. Our employment
practices are consistent with our values of inherent worth and dignity.

GOALS
Expand Current Facility [1st or 2nd (tie) in vote priority]
Plan to expand our current facility, including a sanctuary designed to serve 400 people
and provide a more contemplative environment appropriate for and dedicated to events,
including worship, memorial, wedding, and community services. The plan should be
inspired by the original “Field of Dreams” building plan. Utilize our current worship
space as a multi-purpose fellowship hall where various activities, including food service,
could be held, free of the necessity for volunteers to frequently rearrange the space for
Sunday and other services. Additional functionality would include: expanded office space
for our increasing staff needs, expanded space dedicated exclusively as RE classroom,
storage and meeting room space; a choir practice room to allow the choir to practice
uninterrupted as congregation is entering sanctuary for service; and up-to-date A/V
technology and computer networking infrastructure.
Facility Funding [1st or 2nd (tie) in vote priority]
To ensure maintenance of the existing facility and to continue investment in the original “Field of Dreams” building plan, the annual ALUUC budget beginning July 1, 2017 will include in the Finance section a special “Capital Development” line item equivalent to the amount allocated for mortgage payments scheduled to lapse in January 2018. Increase the annual budget for facilities maintenance, with the amount to be determined by the Finance and Facilities Committees, for large maintenance projects and other needs. This will help us to live more comfortably in our current building.

Expand sustainable practices for our [7th, 8th, 9th (tie) in vote priority]
Build awareness about the importance of using fewer resources and being responsible and mindful of the choices we make, including implementing energy-saving recommendations from our energy audit, purchasing recycled products and environmentally friendly cleaning products, continuing to develop our prairie with signage and a path for meditation, expanding the solar power array, installing low-flow toilets, researching a small wind generator, and being prepared to replace our aging HVAC system with a more efficient model when the current ones reach the end of their life.

Facility Cleaning, Setup, Maintenance [7th, 8th, 9th (tie) in vote priority]
Employ a sexton, charged with maintenance of our buildings, to work in conjunction with volunteers to ensure the continued operation and upkeep of the church, including the oversight and coordination of the use of the property by the community.
# GOAL PRIORITIES

## ALUUC Long Range Planning Goal Priorities

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PROCESS OVERVIEW

BENEFITS OF LONG RANGE PLANNING

Long range planning can provide an organization:
- A stronger sense of identity and focus.
- Enhanced community as a result of conversations with a wider range of people about dreams and vision.
- Increased congregational involvement by pulling people together, some of whom may have previously been on the fringe of participation who now share the work.
- Increased probability that plans are fulfilled and actions implemented.
- Heightened strategic intelligence as a result of the process: The congregation is able to think strategically about a range of issues and opportunities.
- More awareness of mission and the plan for direction, decision making and evaluation of programming.
- Building on the experience by enriching the community in new ways.

CONSULTANTS

Two consultants were provided by the Mid-America Region of the UUA. Thom Thomas provided an overview of current long range planning practices at our first planning meeting in November. After he became ill, Steve Mennerick became our consultant. Steve helped us with detailed planning, provided ongoing consultation and spoke at our Sunday service on October 23. Their guidance was helpful in planning the process, answering questions and keeping us going, and their input instrumental in expanding our long range planning process.

PLANNING MEETINGS

NOVEMBER 2015

About 20 congregational leaders attended our first planning meeting in November. Consultant Thom Thomas presented benefits of long range planning and an overview of the appreciative inquiry process. He said congregations who engage in ongoing long range planning benefit, and particularly that having a capital campaign will also tend to increase annual pledging if conducted well.

JANUARY 2016

About ten congregational leaders attended our second planning meeting in November. Consultant Steve Mennerick provided more details about the appreciative inquiry process.
The Appreciative Inquiry (AI) process was recommended by our consultants and used successfully by congregations in Kirkwood, MO and Champaign / Urbana. We modified it to fit the needs of ALUUC. The most important aspects of the AI process are that it:

- Avoids a focus on problems since such a focus tends to result in perpetuation the problems.
- Recognizes and celebrates past successes and what already works well within the community.
- Builds on demonstrated strengths, talents and skills of the community.
- Encourages participation, input, and ownership by the entire community.
- Creates positive energy and enthusiasm to implement the goals that realize the strategic direction.

After much discussion, the Committee decided to deviate from the use of the AI phrase “Provocative Proposition” when we realized that most people didn’t understand the concept. We labeled our propositions “Strategic Visions”.

**Thoughts on using the Appreciative Inquiry Process**

Given that the AI process was unfamiliar to ALUUC leadership, future long range planning should give more attention to ensuring the following are in place:

- Church leadership and particularly Long Range Planning Committee members have training to better understand the AI process and target outcomes.
- Maintaining a positive perspective for the long range planning process is a priority for committee members and church leadership to realize positive feelings and enthusiastic support for goals and visions / propositions within the congregation.
- Leaders recognize the importance of celebrating milestones in the planning process so the project ends on a positive note and future long range planning efforts are assured of volunteer support and congregational participation.
COTTAGE GROUPS

Committee members and volunteers held Cottage Group Meetings from February through March. Each cottage group meeting had a trained facilitator, who used a set script, and a scribe. Each meeting had about 10 participants and lasted around two hours.

The first Cottage Group session was held at Co-Chair Debby Hagan’s home and incorporated a training session for future facilitators and scribes and included feedback from participants.

We opened each cottage group session with the ALUUC Mission Statement, an overview of the long range planning process and the agenda for the meeting. We asked participants to share what’s most important to them about ALUUC; to tell us a story about ALUUC. We grouped the stories into themes. Based on themes, we led a discussion about the actions that illustrate those themes. Finally, we asked participants to share their visions for the future of ALUUC.

On six days in February and March, we conducted 11 cottage group sessions with 103 members and friends participating. Participants were enthusiastic and shared their stories and visions openly.

During the Cottage Group Meetings, designed to gather input from the ALUUC Congregation, congregants were asked to articulate what they thought worked best in our congregation, what made them feel proud and fulfilled. Many times congregants responded that they really appreciated our Minister and all that he does for us and the community. Below are just some of the comments recorded:

- They found the minister’s sermons inspirational and they liked and approved of his leadership in the community on social justice issues including his work on the Marriage Equality legislation.
- They supported his networking with other religious organizations and progressive groups such as Phoenix Center, PrideFest and the Interfaith Alliance.
- They appreciated his caring and comforting way of handling life passages services such as weddings, funerals and child celebrations.
- They recognized his tireless attention to the pastoral care needs of congregants.
- They also appreciated his support of all of the various spiritual paths within the congregations such as the Pagan Group, the Meditation Group and organizing the Labyrinth walk once a month.
- Congregants also brought up that they enjoyed his organized Fellowship events such as movie nights and congregational picnics.

See APPENDIX IV – DOCUMENTS for the cottage group facilitator script.
STRATEGIC VISIONS

From the input of the Cottage Group Meetings, the Long Range Planning Committee created five Strategic Visions to guide the future of ALUUC for the next 10 years.

There were two points of disagreement within the committee:

- The term Provocative Propositions was replaced with Strategic Visions to reduce the amount of explaining the committee would need to do in the short timeframe for presenting the long range ideas and gaining congregational buy-in.
- The Strategic Visions were left in present tense. Stated in the present tense, as if they are already happening, our strategic visions are already changing us as a community and preparing us to actively create our future.

The most important aspects of the Strategic Visions are that they are:

- Meaningful to ALUUC,
- Grounded in the best of the past, and
- Describe a challenging but achievable future.
GOALS INPUT

SAMPLE GOALS
Sample goals were created by the Committee from cottage group input and from looking at goals from other congregations. The committee met multiple times to review, rewrite and make goals as specific as we could manage. Even so, the resulting goals lacked details that would have been SMART, and details were left to the Board and those charged with implementing the goals.

The Committee met with the Board, Staff and Committees to explain our process in detail, share the Strategic Visions, and gather goals for consideration.

BOARD GOALS
Representatives of the LRP Committee met with the Board on July 12.

A minor edit to the Strategic Visions resulted. Multiple goals were collected and noted in a spreadsheet. See Appendix II – DETAILED SHORT TERM GOALS, which includes board goals other than long range goals.

STAFF GOALS
Representatives of the LRP Committee met with staff, including Rev. Martin Woulfe, Office Manager Cheryl Wycoff, former DRE Tracy Zieber-Minks, Choir Director Kathy Schultz, and Intern Minister Paula Brayden on August 24. DRE and Membership Coordinator positions were not filled at the time.

Multiple goals were collected and noted in a spreadsheet. See Appendix II – DETAILED SHORT TERM GOALS, which includes staff goals other than long range goals.

COMMITTEE GOALS
Representatives of the LRP Committee met with the Committee Council on Sunday, August 28. We provided an overview of the process, reviewed the Strategic Visions, and explained SMART goals.

Representatives of the LRP Committee met with the Committee Council the second time on Sunday, September 25. Many detailed goals were collected and noted in a spreadsheet. The committee chairs said the process of looking at where they wanted to be in the future helped them identify both long range and short range goals in a way they hadn’t done before. See Appendix II – DETAILED SHORT TERM GOALS, which includes committee goals other than long range goals.

CONGREGATION GOALS – SUNDAY SERVICE AND POTLUCK OCTOBER 23, 2016
The Sunday service on October 23 at which we presented the Strategic Visions and goals to date was well attended. Committee Co-Chair Debby Hagan was the service leader. Consultant Steve Mennerick spoke about long range planning. Committee Co-Chair Carol Kneedler provided overview of process. Committee members Gwen Childs, Kurt DeWeese, Stu Jacobsen, Posy Robertson, Dianne Roberts, and Kurt DeWeese read the Strategic Visions.
Handouts of the Strategic Visions and the goals to date were provided, and congregants were asked to submit additional goals by placing a sticky note on a whiteboard at the front of the sanctuary. There was a potluck afterwards during which congregants could ask questions. There were no comments on the Strategic Visions.

The whiteboard remained in place through the next Sunday October 30. 15 additional goals were collected from the congregation. One of those goals met the criteria as a long range goal: **International Mission**: Expand our mission internationally by renewing contact with our partner church in Transylvania and the UU Partnership Church Council, resulting in 17 total goals. Several other congregational goals were used to expand or adjust the existing 16 goals. The rest were added to the spreadsheet.

See Appendix II – DETAILED SHORT TERM GOALS, which includes congregation goals other than long range goals.

View a video of the service here: [https://www.youtube.com/watch?list=PLVT55xhWVNscimlBHFlwmoscneMNaYJ&v=bfJXlvIxhPE](https://www.youtube.com/watch?list=PLVT55xhWVNscimlBHFlwmoscneMNaYJ&v=bfJXlvIxhPE)

**DEFINING LONG TERM GOALS**

After the second committee meeting, at which were shared multiple very detailed goals, the LRP Chairs defined how the committee would identify long range goals and what goals would be referred back to the board, staff or committees. We defined long range goals as those that require more money or volunteers than the committees or board or staff currently have available to them OR that call for a change in our mission.
CONGREGATIONAL MEETING – SUNDAY NOVEMBER 13

On November 13, we held a special congregational meeting after service to vote to adopt our Strategic Visions. Handouts were provided in the Order of Service with the Strategic Visions and 17 Long Range Goals.

The resolution passed unanimously:

The Membership of ALUUC shall adopt these Strategic Visions as the plan for ALUUC's future.

Members were provided with yellow legal-sized paper ballots and 5 dots to prioritize the top goals the congregation will work on first. As many as two dots could be placed on a single goal. Members receiving a ballot that day were required to turn in ballots before leaving. After the meeting, members not yet prioritizing were emailed several times to encourage participation. Members without email were called. In all, 107 out of 239 members prioritized the goals. Only one ballot had dots in excess of 2 per goal.

The rest of the goals will be set aside for future consideration in 2018 and beyond.

FINAL REPORT TO BOARD

The Committee provided an interim report containing the strategic visions and prioritized goals with implementation ideas to the Board for their December 13 meeting. The board will consider the prioritized goals and decide how many of the top goals can be started within the next 18 months.

The Long Range Planning Committee will issue a report by the end of 2016 with the strategic visions; the 18 month goals; the long-range future goals; the committee goals; cottage group comments; and an overview of our process.

NEXT STEPS

Over the next several years, the congregation will implement the prioritized goals. Progress on the plans and goals should be evaluated every year, and in the future we may decide to begin to implement some of the remaining goals – or to update our long range plans.
LONG TERM LONG-RANGE PLANNING PROCESS RECOMMENDATIONS

Our consultants recommended that a permanent LRP Committee be established by the Board. It is via a long-range plan that the church can evaluate its progress toward stated and agreed upon goals and make decisions on new goals/plans within the context of a long-range view. Even with a “blueprint” now in place, it is not feasible to expect the Board to perform the long-range planning evaluation, update, and extension along with its other duties.

Some thoughts on what this committee would look like and what it would do:
- Evaluate progress toward goals/plans in the current year.
- Solicit input for revising the standing LRP and extending its scope each year.
- Input from broad leadership surveys would be appropriate every other year; next survey in the fall of 2018.
- It is recommended that the committee size be around 7-8 members and volunteers recruited for two-year staggered terms.

The board should ascertain if current members of this LRP Committee will be available to serve on the permanent committee.
APPENDIX I – DETAILED COTTAGE GROUP INPUT

See document APPENDIX-I-DETAILED-COTTAGE-GROUP-INPUT.xlsx

APPENDIX II – DETAILED SHORT TERM GOALS

See document APPENDIX-II-DETAILED-SHORT-TERM-GOALS.pdf

APPENDIX III – COMMENTS DURING CONGREGATIONAL MEETING

There were several comments during the congregational meeting:

One person asked for increased emphasis on social action in the Strategic Visions, but did not wish to make an amendment to the motion to accept the Strategic Vision.

One person commented that they wished to prioritize increased support to Religious Education but felt the congregation wasn’t yet ready to start on the long range goal of a full-time DRE.

The secret paper ballots were well received with several people expressing their appreciation. However, it did not allow people to adjust their vote after seeing how others voted in the event some may have wanted to express additional support for less popular goals.

APPENDIX IV – DOCUMENTS

See document APPENDIX-IV-DOCUMENTS.pdf

OVERVIEW OF PROCESS
VISUAL TIMELINE
COTTAGE GROUP SCRIPT
INTRODUCTION TO GOALS INPUT FOR BOARD, STAFF, COMMITTEES
SMART GOALS
SUNDAY SERVICE HANDOUT – TIMELINE AND STRATEGIC VISIONS
GOALS PRIORITIZATION BALLOT
NEWSLETTER ARTICLES