



**OLYMPIA UNITARIAN UNIVERSALIST  
CONGREGATION**

**2012-2018  
LONG RANGE PLAN**

JULY 12, 2012

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# **OUUC Long Range Plan 2012-2018**

## ***Part 1 - Plan Development Process***

The Board charged the creation of a Long Range Plan Committee (LRPC) in December 11, 2011, and the committee convened in January 2012. Members were Ann Yeo, Jonathan Nowitz, Gretchen Faulstich, Kelly Thompson, and Bonnie Shorin as chair. The first tasks were to identify focus areas for OUUC's look forward, and to develop an electronic survey to gauge both support for the identified focus areas, and completeness of the list of focus areas. The focus areas were Transformative Worship, Spiritual Growth, Caring Community, Social Action and Advocacy, Fostering Generosity, Leadership Development, and Stewardship of Building, Grounds, and Space. This survey also requested interested persons to self-identify for focus group goal development.

The survey was available for 3 weeks - March into April. 142 people responded electronically, 3 people with hard copies. Respondent support for focus areas was nearly identical between Spiritual Growth and Transformative Worship. Social Action and Advocacy was ranked next, with Caring Community following closely. Comments received showed the Spiritual Growth and Transformative Worship were often construed as on the same spectrum, so the LRPC concluded that one focus group on this topic would be ideal.

Focus Groups were formed using responses from the Survey, members who identified interest via Facebook request, email response, and personal contact. Each Focus Group had 3 to 6 members. The LRPC provided the Mission Statement and Adopted OUUC Outcomes statements as foundational material, and the Focus Groups had 4 weeks in which to meet and draw up goals, with a target of 3 goals maximum. The LRPC encouraged no more than one "stretch" goal per committee, intended to be an ambitious goal that could require significant commitment and focus on the part of the congregation.

The Chair received all goals at the end of April, and prepared a PowerPoint presentation, as well as a draft skeleton document that "nested" the draft goals within the OUUC Outcomes document. On May 5, 2012, twenty three members attended a vetting meeting where the draft goals were presented by the respective Focus Group representatives. Discussion followed, and comments and suggestions were captured by the LRPC chair on a flip chart. Suggested revisions were incorporated into the nested document, and shared electronically with the members present on May 5th, the LRPC members, and others who indicated by Facebook reply that they were interested in review and comment opportunities.

The document was discussed by the Program Council in early June 2012, with comments provided to the LRPC. After appropriate changes were made to the draft, the LRPC presented the document to the Board with a cover memo<sup>1</sup> requesting the Board review, revise, and prioritize among the many worthwhile goals offered by our membership for the coming years. The Board spent several hours in thoughtful deliberation and discussion over the content of the document at the late June Board retreat. This effort produced several revisions among the text, exclusion of the nested elements, and the decision to elevate two of the goals to over-arch the work of the congregation through 2018.

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<sup>1</sup> This memo is included as an attachment to this document.

All revisions identified there were incorporated and an updated draft was presented to OUUC staff on July 3, 2012. A final document, with priorities, was presented to Board for approval at the Board's July 12, 2012, meeting. The Board's priority goals for the OUUC 2012-2018 Long Range Plan are:

**1) Increase our capacity to provide ministry for all those who want a liberal religious community;**

and

**2) Prepare and carry out a long-term partnership program by which we identify and support a project with high community impact, which advances our mission and principles.**

## ***Part 2 – Five-Year Goals by Focus Area***

The Long Range Plan serves as a guidebook, giving direction to the many committees of OUUC, so that as each group identifies specific ambitions and tasks, all the choices, separately and together, take OUUC closer to realizing its vision and mission. This section of the Long Range Plan describes the 5-year goals by Focus Area, and lists proposed actions that could be undertaken in order to help meet those goals. It is understood that achieving all goals in each year is unlikely, and that this is not a failing. Moreover, the listed tasks are not exclusive, nor mandatory, but a starting point from which ideas for action may be developed.

Because the Focus Areas are similar to existing committees, this format should be useful to the committees and the Program Council as they chart out their activities and proposed budgets each year through 2018. Goals are presented in underlined text, and proposed actions are identified with bullet points.

Each goal is followed by a series of symbols which represent aspects of our mission statement. The presence of a symbol indicates which portions of our mission are clearly met by achieving the goal. The mission of the congregation, with related symbols, follows:

**OUUC is a liberal religious community that opens minds  
(∞),**

**Fills Hearts (♥), Transforms Lives (👉). We work for  
Peace (✌),**

**Equality (=), A healthy Earth (□), And an End to Poverty  
(👐).**

While each of the goals offered by our community members represents valued vision for the work we can and should do as a community, the Board of Trustees notes that two of the goals developed for this Long Range Plan stand apart as potentially transformative for OUUC. The Board recommends that the highest priority goals for 2012 – 2018 are to:

**Increase our capacity to provide ministry for all those who want a liberal religious community;**

and

**Prepare and carry out a long-term partnership program by which we identify and support a project with high community impact, which advances our mission and principles.**

These two goals should serve as the larger standard that guides us when choosing which, among the many goals and proposed tasks contained in this Long Range Plan, to undertake each year.

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## Focus: Spiritual Growth and Transformative Worship

Goal: Provide ongoing opportunities for personal and/or communal transformation through worship, study, and action.

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Proposed tasks:

- Provide more worship options (different service times/days; multiple service styles; experiential worship, with a balance between inward and outward growth opportunities).
- Provide more multigenerational services/activities; youth created services; youth participation in leadership.
- Create a physical environment that supports the larger life of the community, and allows hosting larger community events (sanctuary expansion/design).
- Expand outreach methods and opportunities.

Goal: Foster and integrate a deeper sense of community to include, invite, and celebrate acceptance and compassion.

∞ ♥ 👍 ✌️

Proposed tasks:

- Reinvigorate our conflict management team's education process within our community.
- Implement strategies to promote permeable boundaries, open-mindedness and shared governance (minimize "turf" and "ownership").
- Demonstrate inclusiveness through action - consciously design opportunities to share diversity and commonalities, proactively invite others with different points of view to come speak.
- Deepen relationships: foster an atmosphere where people can speak honestly; practice acceptance of others' ideas, involve others with different points of view; encourage creation of small groups with strong connections.
- Engage new people. Invite people to use Robbie's Rule from Youth Group.
- Focus more on spiritual aspects of Unitarian Universalism in orientation classes.

Goal: Appeal to persons of all ages.



Proposed tasks:

- Provide opportunities for youth to plan and provide a service of their own design.
- Improve inclusiveness and inviting quality for youth at Sunday service worship.
- Involve children and youth more in services.
- Celebrate the wisdoms of every age.
- Listen and pay attention to viewpoints from all age groups.
- Provide youth opportunities for church leadership.
- Take steps to better integrate youth, young adults, and young families into OUUC, (i.e., setting meeting times to accommodate these age groups).

Goal: Increase our capacity to provide ministry for those who want a liberal religious community.



Proposed tasks:

- Develop Institutional Ministries, such as on the campuses of local colleges and at hospitals, long term care facilities, and prisons.
- Provide worship service times and formats to meet the needs of people of various age groups, income levels, and belief systems.
- Address facility expansion needs to accommodate increases in membership.

**Focus: Social Action and Advocacy**

Goal: Build Beloved Community.



Proposed tasks:

- Through message and action, emphasize that peace is something we bring to the world.
- Live more fully into our covenant of right relations, within and outside of our congregation.



- From the pulpit and through religious education, provide opportunities for learning about and supporting a philosophy of "beloved community" at OUUC.

Goal: Use OUUC's location in the State's Capitol to full advantage, giving voice and expression to our principles.



Proposed tasks:

- Hold a key role in the South Sound area in providing support and service to those in need, through partnership and cooperation with local NGOs and Agencies.
- Provide events and opportunities for members and friends, in order to increase our awareness of, understanding of, and participation in, actions that expand our ministry.
- Provide visible support and action for creation a sustainable environment.

Goal: Increase our support of groups in need.



Proposed tasks:

- Provide financial contributions to organizations and programs in the larger community, with a minimum of 10 percent of the annual budget.
- By 2018, one hundred percent of share the plate offerings should be directed to outside organizations including those that directly benefit people who are impacted by poverty or discrimination.
- Contribute to entities working to reduce homelessness, such as Panza, Sidewalk, and continue to share time, money, and labor, to benefit Out of the Woods.

Goal: Prepare and carry out a long-term partnership program by which we identify and support a project with high community impact, which advances our mission and principles .



Proposed tasks:

- By January 2013, create a method to choose an aspect of our mission and principle to advance over a multi-year effort.
- By April 2013, use that method to choose an aspect of our mission and principles to advance through 2016.

- By June 2013 choose an entity or project that creates high community impact consistent with our chosen mission and principles, and partner with that organization to increase its success over the next several years.

## Focus: Caring Community

Goal: Maintain, and work to expand, current levels of services, activities, and opportunities for community connection.

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Proposed tasks:

- Carry out regular UU neighborhood events, such as potluck picnics, in order to increase awareness of who lives in proximity, and to strengthen ties between nearby UU families.
- Increase the number of family and intergenerational events.
- Identify more methods for engaging new members.
- Expand discussions within the congregation and with our neighbors, of the need and methods to reduce our parking demand and its impact on the neighborhood.

Goal: Improve how we identify those members and friends who may need assistance.

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Proposed tasks:

- Establish linkages between Caring Friends and Pastoral Care Committee to improve community awareness of life changes (eg, illness, injury, changing marital status, etc).
- Create a Church Help Line (an extension that members and friends can call to reach out for help if their circumstances leave them in need of additional support).
- Develop emergency plans that cover the facility and the membership, including a phone tree.
- Evaluate the need for a development of a Grief Counseling Team, which could operate in a manner similar to the Conflict Management Team.
- Increase awareness of available support services and how to access them.

## Focus: Stewardship of Building and Grounds

Goal: Use our grounds to expand opportunities for spiritual practice of our members, while maintaining a healthy natural environment.



Proposed tasks:

- Accommodate increasing membership with improvement to our facilities.
- Build a playground on flat ground, that can accommodate up to thirty children under the age of twelve, with a play structure and an area for group games, which is accessible from the social hall, and is attractive to parents and children;
- Build the labyrinth and the memorial garden.
- Expand the parking lot to meet city requirements for cars and bicycles.
- Expand the sanctuary.
- Integrate our expansion projects with minimal impact on our forest.

Goal: Maintain facilities and grounds that are comfortable, accessible, healthy, and inspirational.



Proposed tasks:

- Conduct a “reserve study” to identify the expected lifespan of all aspects of the church facilities and grounds, and to project maintenance timing, costs, replacement schedules, and expansion needs (include a furniture replacement schedule, utilities (sewer and stormwater), and parking areas).
- Evaluate our properties for potential future uses.
- Allocate funding, and define responsibilities to ensure that identified maintenance actions from the reserve study are carried out.
- Make maintenance choices that are mindful of environmental safety and chemical sensitivities.

Goal: Develop a best use plan for the Annex property and structure.



Proposed tasks:

- Develop a lifespan and maintenance plan for the Annex with identified maintenance schedules, allocated funding, and defined responsibilities, in co-operation with the Out of the Woods Long Range Planning effort.

### Focus: Fostering Generosity

Goal: Increase our community's awareness that being generous with money, time, energy, knowledge, skill, and friendship, is both transformative and spiritual.



Proposed tasks:

- Build on the work that has been done to foster generosity at OUUC.
- Involve all ages in congregational experiences and opportunities for generosity, together where possible (because people's giving increases when they are actively involved, and when they want to see more of the good we are doing).
- Form Resiliency Circles, small groups that learn together about economic issues and support each other.
- Hold classes on budgeting, or money issues, or allocating expenditures consistently with values.
- Continue with messages (sermons, Unitariana articles) that help members get more comfortable talking about money, because moving from the mindset of scarcity to the mindset of abundance is transformative. Include messaging across all age groups that generosity includes action and attitude.

Goal: Support the growing financial needs of the congregation.



Proposed tasks:

- Establish a standing Stewardship Committee
- Explore using FORTH (the UUA's Stewardship Development Program) as a framework for our efforts on enhancing giving.
- Target a 7 percent annual increase receipts to pay for building costs.

- Increase bequests for the Endowment fund.

## Focus: Leadership and Governance

Goal: Motivate members to aspire to leadership roles

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Proposed tasks:

- Improve recruitment to committees by holding “committee fairs.”
- Provide positive messages on the ministry of leadership.
- Teach members about the cyclic nature of OUUC's volunteer work.
- Encourage members to use their leadership skills in the congregation and in the community.
- Increase training opportunities in leadership skills, using the resources of the congregation, the PNWD and the denomination.

Goal: Increase the transparency and member understanding of church governance.

∞ ✌ =

Proposed tasks:

- Educate congregational members on the important differences between visionary and executive leadership in our relatively new policy based form of governance.
- Have committees develop a succession or redundancy model, to prevent burn-out and to keep volunteers positively engaged in the life of the church.

### **Part 3 – Mission Elements with Congregational Outcomes**

In April of 2011, the Board of Trustees presented to the Congregation for their review and approval, a suite of Outcomes that were drawn up to meet OUUC's mission statement. By vote of the Congregation on April 29th, the Outcomes document was approved. The following pages present the drafted 5-year goals of within the framework of the OUUC Outcomes, and OUUC Mission.

Each year the OUUC leadership prepares a report that summarizes and evaluates the preceding year's committee work and ministry. A component of this annual report is a determination of how well each committee's work supported fulfilling the OUUC mission and goals. When this effort shows areas of low success, it provides the opportunity to for the leadership to craft annual goals that can specifically target better achievement in those areas.

Because the Five Year Goals are intended to guide OUUC's actions toward the fulfillment of our Mission and Outcomes, this section of the Long Range Plan should be valuable for the Leadership when conducting its annual review and preparing the annual report, and in crafting annual goals that support our shared vision for OUUCs future.

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#### **Mission - we are a community that opens minds:**

Outcome: We are a center of lifelong, liberal religious education in South Puget Sound.

Outcome: We provide a broad range of perspectives and experiences that respect diversity and promote tolerance.

#### **Mission - we are a community that fills hearts:**

Outcome: All who come here experience a warm welcome and the care and respect of community.

Outcome: All who come to OUUC find a meaningful experience of the sacred.

#### **Mission - we are a community that transforms lives:**

Outcome: As individuals and as a congregation, we are engaged in a dynamic process of spiritual growth and a commitment to the common good.

### Mission - we work for peace:

Outcome: Within our congregation, we model a culture of peace, and we honor the truths of multiple voices.

Outcome: In the larger community, we foster peace through compassion, tolerance, and public advocacy.

### Mission - we work for equality:

Outcome: In our congregation, we welcome and celebrate a diversity of opinions and lifestyles.

Outcome: In the larger community, we work to end discrimination.

### Mission - we work for a healthy earth:

Outcome: We promote consciousness of our interdependence with all life, and we inspire stewardship and reverence.

Outcome: We inform our consumption of natural resources with an awareness of the impacts of our choices on the earth and all living beings.

### Mission - we work for an end to poverty:

Outcome: Our support of community organizations reduces homelessness, increases individual independence, and provides resources to reduce poverty.

**Part 4 – Non Mission Planning Requirements for Continuity**

This chapter, which is under development at the date of the Board’s adoption of the document, will focus on non-mission planning. Over all, it will be a continuity element, centered on issues such as planning for staff sabbaticals, when and how to call a new minister if necessary, and action steps for emergent events that could limit access to the building, such as fire or earthquake, or other circumstances that could endanger our congregants at while at our facility.

Members of the LRPC will work with members of the congregation who have already begun to develop emergency plan components, and note the significant contribution of Julie Rodwell on this critical element. The LRPC will also work with staff to identify potential timeframes for sabbaticals, retirement, or other anticipated leave of extended duration, and steps appropriate to ensure that the operation of OUUC continues smoothly.





# MEMORANDUM

**To:** The OUUC Board of Trustees  
**From:** The 2012 Long Range Planning Committee  
**Date:** June 25, 2012

**For:** Review, Revision, and Action

As the Board considers this long-range plan and how it will be used, we encourage you to honor all the recommendations and play your important role in prioritizing goals and carefully considering their potential impact on the congregation. You do this work in the context of priorities already established—to grow the congregation, to make music an important part of worship, to provide a strong program of religious education, and to carry out the ministry of our community. As you review the goals and suggestions for action you'll notice that some appear to be logical next steps that build on work underway, some are modest new ideas easily accommodated in a program-sized church, and a few are potentially transformative. Because congregational capacity to embrace and accommodate change is neither fixed, nor infinitely elastic, your role in helping to gently guide the congregation in correctly sizing our efforts in the various areas will be important.

This plan does not specifically make growth a goal, though the building expansion suggests anticipation of continued growth and requires increased expenses that will be much easier to meet with membership growth, suggesting it is already functioning as a transformative goal at OUUC. Several of the goals speak to efforts that support growth in numbers and improvements in caring, community, and operations as that growth occurs. It's worth noting that the plan also does not address sabbaticals, staffing enhancements, or staff transitions that may be reasonable to anticipate in over the term of this plan.

If you see the possibility over the next 5 years of embracing a potentially transformative goal beyond the presumed goal of growth, we see several possibilities in the long-range plan (and the Board may see others). One is in the social justice area, and it is actually a combination of two listed—to expand financial support for the needy including sharing 100% of the undesignated plate collections, and to undertake congregational year-long social justice projects. Involving the congregation in social justice in increasingly effective ways is potentially transformative both individually, and as a community.

Another potentially transformative goal is the proposal to develop institutional ministries on college campuses, and in hospitals, long-term care facilities, and in prisons. To really do this would require significant congregational engagement, yet it is an idea that could be explored and begun on a much smaller scale.

Similarly, the goal regarding transformative worship and personal growth could potentially be a transformative one if we chose to invest significant congregational resources, or it could be approached in a more gradual manner. All this is to say that, if the Board and Minister think the congregation can manage another transformative goal besides congregational growth, the Long Range Planning Committee strongly feels that one is the upper limit.

This means that (1) careful review by the Board of the many goals identified by the leadership and actively interested members of the congregation is necessary, in order that the Board clearly identify which are the transformative goals, and (2) the Board has the burden of prioritizing among the many goals and carefully editing the language so that the Plan sets expectations that are high enough and realistically achievable for the other goal areas.

## MEMORANDUM

TO: OUUC Board of Trustees  
FROM: Gail Gosney Wrede, Board President  
DATE: July 9, 2012  
RE: OUUC Long Range Plan 2012-2018

It is my privilege to present, for your consideration and vote, the proposed Olympia Unitarian Universalist Congregation Long Range Plan for 2012-2018. As you know, this document is the result of many hours of labor on the part of the Long Range Planning Committee and Bonnie Shorin as the LRPC Chair. Most importantly, this plan represents input from OUUC Committees, members, and staff.

As we have worked through the planning process, two over-arching goals have emerged for the congregation for the next five years:

Increase our capacity to provide ministry for all people who want a liberal religious community in South Puget Sound; and

Prepare and carry out a long-term partnership program with high community impact, which advances our mission and principles.

The goals contained in the Long Range Plan for 2012-2018 are ambitious. I believe they reflect the shift we are experiencing in our community from a focus on infrastructure development and building needs to a focus on personal and communal transformation, community building and mission-driven work in our communities.

OUUC is already known for our compassion, our work on ending poverty and homelessness and our strength as a community. This plan expands on those strengths, helps us enlarge our community and gives us the direction and guidance to expand our work in the larger community that fulfills our mission.

It is with wide pride and excitement that I commend this Long Range Plan to you for your approval.