



Not for Ourselves Alone

Strategic Plan for 2012-2020:

Five Strategic Outcomes

University Unitarian Church

Seattle, Washington

Rev. Jon Luopa, Senior Minister

Rev. Dr. Alicia Grace, Minister

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Not for Ourselves Alone

Who are we called to be at this moment in our history? After 18 months of listening and discernment, the University Unitarian Planning Team members believe that we must plan, indeed, “not for ourselves alone,” but to share our resources with the community and world in which we live, and to leave the legacy of an engaged and vital liberal religious community to those who will follow us.

During the data-gathering phase of our Year of Discernment, three desires repeatedly surfaced: that we become more intentional about engaging all age groups in common experiences at UUC; that we support any person who wants to become more integrated into our congregation; and that we hold ourselves and each other to a higher level of accountability in our joint work and mutual support.

Prospective and existing members consistently identified the deepening of their own understanding, spirituality, and motivation as a primary reason for their continuing involvement in our church. This kind of personal change can happen when worship services feel integrated, transformative, and focused. It can also happen when we leave our comfort zones and are encouraged and taught how to move outside our cultural biases of race, class, and gender into worlds of people different from us.

While we value the long legacy of social justice work in UUC’s history, we also realize that new expressions, strategies, and partners are needed to meet the issues of our time. We should encourage individuals to strive for justice in personal ways, as we also strengthen our collective voice and effort as a congregation.

We have grown in membership steadily and incrementally over the last decade. We obviously provide an experience and have a “product” that more and more people want. We do not want to turn these people away! Yet we currently have patterns of organizational behavior, leadership, and financial support appropriate to a smaller congregation. Our ability to deliver services must grow, therefore, to meet the demand.

We are the fortunate custodians of a unique building, a building designed for the program needs of a congregation in the 1960s. As our program needs have evolved, so must our use and design of space. Doing this in a way that also allows for sustainable maintenance of the building will be a challenge. But we believe we can both respect our inheritance and be faithful to the dreams of our future.

This strategic plan calls on the members of UUC to a deeper mutual commitment than has been common among Unitarian Universalists or other liberals. This is unfamiliar territory; it requires some voluntary loss of individual autonomy. But by agreeing to a deeper mutual responsibility, the membership can increase its collective power to influence the lives of people in and beyond the congregation's walls.

Dan Hotchkiss

The 14th Dalai Lama said, “Let us reflect on what is truly of value in life, on what gives meaning to our lives – and set our priorities on the basis of that.” The priorities that we have set are of a whole: they begin by grounding our intent to grow with a deeper engagement of people and congregation, asking us to aim higher in our expectations of one another, and with a deepened spiritual grounding that integrates and transforms our lives. This grounding leads us to greater promises to each other about what we are going to be and how we will work for justice in our world. To do these things, we aim to grow – not because being bigger is better, but because of the excitement we experience in response to our calling to deeper engagement in the present, and stronger commitment to our future legacy.

Toward these ends, our five strategic outcomes focus on:

- **Community**
- **Spirit**
- **Justice**
- **Growth**
- **Creative space**

Five Strategic Outcomes by 2020

1. In response to high expectations for active involvement, UUC participants experience the church as a deeply connected, multigenerational community.

- A. Participants at UUC cherish the multigenerational nature of the community and feel called to form significant relationships with persons of all ages in a safe and enriching environment.
- B. Individuals at UUC understand how their unique gifts and needs are recognized and integrated into the UUC community as they serve the larger good.
- C. Individuals readily find the means to connect with small groups within the larger UUC community.
- D. All persons who participate in the life of UUC feel their experience is deepened as a result of covenants of mutual responsibility, both in small groups and within the larger UUC community.

2. Individuals of all ages feel awakened and deepened spiritually as a result of their UUC experiences.

- A. People who participate in Sunday worship and other church activities experience a richer balance between the contemplative and activist dimensions of their lives.
- B. Cross-generational interactions are deepened through exploration of common themes integrating worship, learning, and service.
- C. People feel that their own multicultural awareness, sensitivity, and competence are nurtured as spiritual practices.
- D. People experience deepened self-awareness and sense of life purpose as a result of worship and other UUC experiences.

3. All people and groups at UUC are called on and empowered to engage in justice work as a responsibility of their UU faith.

- A. Individuals and groups in the church are called to express their UU faith through involvement in service/justice work connected with UUC initiatives and partnerships in the larger community.
- B. Individuals and groups work for justice as an expression of gratitude for the gift of life.
- C. When justice issues requiring immediate witness are identified, church leadership is empowered to engage the congregation in action.

4. People embrace the growth that has come to us and feel committed to further growth and to serving well a congregation of up to 800 Sunday worshippers.

- A. Church governance, staffing, planning, and accountability are appropriate for a church with up to an average of 800 Sunday worshippers.
- B. Participants at UUC experience a culture of abundance that leads to more generous pledging in stewardship of the church's assets for those in the church today and for those who will come after us.
- C. Individuals seeking service or leadership roles find clearly identified opportunities to become involved, and feel prepared, mentored, and valued in their work.

5. UUC will have a physical plant with the increased capacity and design function to serve up to 800 Sunday worshippers and live our mission and vision.

- A. Participants take pride in an esthetically welcoming, inspiring, and functional space, which allows UUC to live its mission and vision as church appropriate to its size.
- B. People have an interest in a comprehensive assessment conducted to determine whether or not we can expand/re-build on our current site. If not, people will support a search for a new site in North Seattle.
- C. Participants endorse with enthusiasm a capital campaign to support our 2020 vision.

Introduction to Year of Discernment

After a change in senior ministerial leadership about fifteen years ago, several leaders at UUC recognized that the church might benefit from a long-range planning process, as the congregation was about to enter a new phase in its life. In 2003, a small group of members, together with the new senior minister and district executive, put together a plan in support of a mission statement that the Board of Trustees had recently adopted. When the plan was written, it became clear that we needed both wider congregational endorsement and more staff and lay leadership, in order to implement any such plan. It was agreed that parts of the plan, e.g., adding staff, changing the governance system, creating a leadership development committee, and nurturing numerical membership and financial growth, should be achieved before we launched another large planning effort.

By the fall of 2009, it was clear to senior staff that UUC was now ready to get serious about a strategic planning process. The Board asked the senior minister, Jon Luopa, to explore possibilities of hiring a consultant to help guide this process. Jon interviewed several local, denominational, and national consultants. At the June 2010 meeting of the Board of Trustees, Jon recommended that we hire the Rev. Dan Hotchkiss, a UU minister, from the Alban Institute in Washington, DC. Dan would help lead an 18-month process, start date to be determined, at a cost of \$40,000. The Board approved the recommendation.

A Planning Team would also be needed, and the Board discussed the composition and charter of such a team at its July 2010 meeting. The Board brainstormed the names of thirty-two UUC members and gave Jon permission to recruit six members from this list who would serve with him as the team. Since the team would report to the Board, it was agreed that a Board member should also be on the team and – along with Jon – serve as a communication link to the Board. In August 2010, Jon announced to the Board that Dave Mentz, Susan Wetstone, Michael McDaniel (Board member), Anne Eacker, Katie Renschler, and Kristin Guest had all agreed to serve on the Planning Team. Kristin Guest also agreed to serve as chairperson of the team. Several months into the process, Susan Wetstone resigned her position due to health reasons. The funding for this planning process was secured from the Knatvold Trust, the trustees of which unanimously approved the request in July 2010. A contract with the Alban Institute was signed on August 5, 2010. The process began on October 1, 2010.

As you will see in this report, these past eighteen months have been filled with numerous conversations, meetings, surveys, research efforts, and data-gathering. The Planning Team synthesized all of this information, with the intention that the fresh hopes and dreams of our

congregation might be shaped into a mature vision. This report was presented to the Board of Trustees for their approval on April 19, 2012.

Goals of the Year of Discernment

Goals in the discernment process were two-fold:

- A. To hear the congregation's hopes, dreams, fears, and concerns, and to tap its wisdom to discern how we can best serve each other and the community and world of which we are a part, and
- B. To involve the congregation in the ongoing conversation and discovery, so that everyone understands the issues we are wrestling with and is well prepared for decision-making when the time comes. It's important that we think about the church in a context larger than our Sunday morning experience.

Driving Questions

Early in the process, the Planning Team formulated three “driving questions” to guide the planning process. These questions were reviewed and approved by the Board of Trustees in December 2010.

A. How will we change the lives of those persons who walk the journey with us?

This question is our attempt to determine what and who we want to be as a religious community for those who choose to join in our efforts – whether as members or committed friends. It seems important as we plan for the future to think not just about who we say we are, but also how we hope to impact the lives of those who join with us.

B. What is our mission in the community and the world?

We begin with the premise that our work as a religious community, committed to the UU Principles and Purposes, requires us to be actively involved in the “work of the world,” with openness to both service and justice. We hope that this question is broad enough to allow room to think both about *what* our work should be, and also *how* we can have the greatest impact locally and globally.

C. How will we make room for more people?

We deliberately worded this question broadly; we think there are a number of issues that it includes, which will be important for us to address in planning for the future. In addition to questions about our physical space needs are questions about the level of commitment to growth, how we help new people find ways to become involved in the church, how we accommodate generational and other differences in people’s expectations of UUC, and others.

Mission and Vision Statements for University Unitarian Church

Creating mission and vision statements that address the driving questions and reflect the deepest yearning of the congregation represented an important early step in the planning process. After listening to the congregation, the Planning Team presented drafts of mission and vision statements to the Board of Trustees and the congregation for feedback. The congregation unanimously approved the new mission and vision statements on December 22, 2011. These statements then guided the remainder of the planning process as the team worked to develop strategic outcomes that would realize the mission and vision between now and 2020.

Mission Statement

University Unitarian Church is a community

that covenants to

awaken spirit,

nurture hope and

inspire action.

Vision Statement

We will create a more connected multigenerational community where all individuals welcome, value and support one another, and contribute to the common good.

We will risk leaving the safety of known ways in order to open ourselves to experiences of awe and mystery and deepen our sense of gratitude and awareness that we are connected to creation.

We will be responsible stewards of the gifts we hold in trust, endeavoring to leave a generous and sustainable legacy for those who come after us.

We will vocally and actively oppose injustice and stand in prophetic judgment of all that would diminish the equality and dignity of human beings or harm the web of life. We seek partnership with those who share our goals and creative dialogue with those who challenge us in our search for larger truths.

The Planning Process

To answer the driving questions posed on page eight, the Planning Team engaged in a variety of internal and external data-gathering activities between October 2010 and November 2011. On December 15, 2010, consultant Dan Hotchkiss presented to us a comprehensive consultation report. This document summarized the considerable volume of factual material about UUC that we had provided to him, and called attention to selected facts that he believed, based on his extensive experience with other congregations, to be especially important for planning. This document served as an important guide for our planning process.

The full document is included as Supporting Document A.

A summary follows of additional data-gathering activities and major learning from each of them.

Strengths, Problems, Opportunities, and Threats Analysis – November 10, 2010

In small groups, 14 current and former Board members talked about the strengths, problems, opportunities, and threats – or *SPOT* analysis, as it's often called – facing UUC. Where possible, they were encouraged to turn threats into problem statements (e.g., how does this external/future dynamic affect us, specifically?) and to turn problem statements into opportunities. These 14 individuals were asked to identify their top three items in each category – what they thought we should pay most attention to in this discernment process. We then shared those results as a group.

The feedback could be grouped into three broad categories:

- **Our Resources:** Staff and lay leadership, members, facilities, money
- **Our Ministries:** Worship and programs
- **Our Mission, Community, and Visibility:** Our sense of purpose, identity, internal community, and visibility to the outside world

1. Our Resources

Key Take-Aways:

- *Our people are our greatest strength.* Our staff, ministers, and lay leaders were identified as a top strength, more than any other item. This was identified as a *problem* only insofar as people felt we do not have adequate staffing.
- *Our facilities are our greatest weakness.* This tied in votes for the most significant problem. This has many facets including space, building maintenance, and parking.
- *We have been fortunate with money, but could do better.* Participants expressed gratitude to have met our financial goals in hard times, but feel we have untapped resources, inadequate capital funds, and could do better with stewardship. The economy was the greatest identified threat.

II. Our Ministries

Key Take-Aways:

- *Worship and programs are our top strengths, after staff.* Programs and worship were tied in votes as the second-most-cited strengths (after people).
- *Some questions remain about opportunities in specific programs:* Breaking out specific programs, social justice and music are the two that generate mixed response. On social justice, the perceived problems/opportunities were about the housing program and the opportunity to be more focused in social justice work. Lifespan faith development as a new concept was named as a positive and an opportunity.

III. Our Community, Mission, Visibility

Key Take-Aways:

- *Effectively engaging our people is our greatest weakness or opportunity:* Integrating, engaging, and retaining members was tied for the biggest opportunity/problem statement. Over-busy schedules, despair, and a “turning inward” were related threats.
- *Building a clear and compelling sense of purpose, and truly living it out,* was one of the most significant identified opportunities.
- *There is a sense of demand out in the world for what our faith community offers, and also competition.* We are not as visible or as well understood as we could be.
- *On balance, the potential for growth is seen as an opportunity,* but with some ambivalence.

UU History Event: Remembering Our Past as We Create Our Future, December 5, 2010

UUC members and friends packed Nathan Johnson Hall for the congregational “kick-off” of the *Year of Discernment*, as we remembered our past in preparation for creating our future. Rev. Jon Luopa set the stage for the day with fascinating stories in his sermon of the early history of Unitarians in Washington State and at UUC. Following a tasty lunch, Dan Hotchkiss, the Alban Institute consultant for the planning process, led those assembled in an exercise to discover and understand the patterns and continuities in the last 60 years of UUC’s history.

A few highlights (too many to record in detail here) from recent eras:

1950s and ‘60s: Platform for liberal voices - Rev. Josiah Bartlett invited left-wing speakers, banned elsewhere, to speak at UUC. A member of the original Unitarian Church in the University District remembered the garden gateway, from which our newsletter got its name. Some remember the Revs. Aron Gilmartin and Peter Raible as “the face of liberal religion in the community” during the ‘50s and ‘60s with a focus on civil rights, speakers to challenge McCarthyism, interest in the United Nations, and support for UUC member Lee Minto’s founding of Planned Parenthood. Oh yes, and a *streaker* ran through the church during a Sunday morning service in the ‘60s!

1970s and '80s: “The “church whose lights were always on” - In these decades, the church had a highly regarded music program, sponsored DeWolff House, the first residence in Seattle for people with AIDs, sponsored sanctuary houses for immigrants, applauded Peter Raible’s sermons on controversial topics, and explored hospice programs.

1990s and 2000s: A New Era Begins - Ralph Mero’s *Death with Dignity* initiative was a pioneering effort. Jon Luopa and Alicia Grace were called to our ministry, UUC became a *Welcoming Congregation*, the Intergenerational Choir was formed, Team UUC was born, covenant groups became a significant part of the church’s ministry, micro-lending projects were initiated, and SPAG, a regional high school social action group became prominent. Pilgrimages to Transylvania involved exploration of our European roots, women’s retreats began, and UUC became a *Green Sanctuary*. 9/11 was a historical marker event of which one member wrote: “The night of September 11, 2001, I came here unable to make sense of the world. ... Jon held a torch to lead us on to the next step.”

Many other rich stories were shared and recorded for the Planning Team’s use. Some themes that emerged across time seem worth remembering:

- UUC has a history as a place for the open expression of ideas.
- Clergy and lay leaders have always pushed us and our children to emphasize deeds over words and to change the world.
- Throughout the decades, UUC has taken pride in being a community in which leaders arise and many are drawn into courageous activism on social issues.
- A strong religious education program has been a continuing value at UUC.
- Music has been valued and drawn people to UUC over the decades.
- The current decade is characterized by a balance of personal/pastoral/community ministry, as we turn increasing attention to deepening spirituality and sustaining our own community while engaging increasingly in collaborative action to serve the world.

Consultant Dan Hotchkiss’ perspective on work for justice is also worth remembering:

“Most congregations engage in some form of social ministry. UUC has a proud history of serving others, especially when others shy away. But why? One reason is a simple desire to help others. But we might say instead that UUC’s main goal for social ministry is to transform the lives and hearts of its own members.

Many larger churches find it fruitful to reframe their social mission from “We serve the needy” to “We influence our members to live lives of service.” It is a small but important shift. Some existing outreach ministries continue without change. But the criteria for initiating, evaluating, staffing, and funding social ministry may change quite a bit.

For instance, if our main goal is to change our members’ lives, we will not be satisfied to write a check from the church treasury. We would prefer to send some of our people along with it so they can engage in the kind of service that may change their lives.”

Small Group Conversations: Discerning UUC's Future, January to February 2011

More than 200 members and friends participated in one of our 32 small group conversations held in January and February, with over 25 facilitators who skillfully guided the discussions. Since the strength of the church derives from the collective experiences and motivations of all of us, we valued coming together to share thoughts and feelings about topics of critical importance to the church community.

The ideas, hopes, and concerns shared in the small group conversations clustered in six broad categories as follows:

- **Connections.** Many people expressed deep valuing of UUC as a place of welcome, acceptance, and caring, while also expressing the hope that we can help new people feel welcome and find meaningful ways to fit in and belong. People want to connect both socially and spiritually, and through community social justice work. A desire for more **intergenerational connections** was a particularly prominent theme in the small groups.
- **Spiritual Growth.** People embrace UUC as a safe place to grow as whole persons – spiritual, intellectual, social, political selves interconnected. Some saw spiritual growth as the essential center of values we can carry out to the world. Sunday worship services are seen as a primary source of spiritual growth, while some hoped for more inclusiveness in our styles of worship and music.
- **Social Justice and Community Leadership.** Many expressed great pride in UUC's past social justice accomplishments and cited social action as a reason to join UUC. Many also expressed interest in seeking greater connections with allied communities – including other UU churches, and black and Hispanic churches. Some urged us to challenge each other and to stretch our boundaries.
- **Diversity/Inclusion.** People expressed interest in a variety of forms of diversity and inclusion. These ranged from offering opportunity for diverse voices to be heard, support (e.g., classes) to help us communicate with people across the political and religious spectrum, interest in greater racial and cultural diversity, and finding ways to address diverse needs of nurturing the spirit in our services, music, movements, and prayer.
- **Church Leadership and Management.** Many noted the importance of developing leaders to sustain us in the future. Some feel that UUC relies too heavily on volunteers to sustain the needs of a congregation our size, while others feel we need to do more to tap our abundant volunteer resources.
- **Space.** A few expressed the need to address the issue of space, noting that we need more space in order to make room for more people in our community. Some felt that the building is inadequate, mentioning a variety of limitations.

Finally, interest in **effective communications** is an issue that came up in a variety of ways that seemed to cut across categories. Systems that facilitate the connections among members and friends and means of getting information out in timely ways were mentioned.

A more detailed summary of these conversations is included as Supporting Document B.

Meetings with Key Church Groups: February and March 2011

Planning Team members, in pairs, attended each of a series of meetings with key church groups during February and March 2011 to hear their responses to the question: “From where you sit, what does UUC need to pay attention to in the next 5+ years?” Groups were also asked to prioritize future needs if possible. Groups interviewed included the UUC Social Justice Steering Committee, Leadership Development Committee, Lifespan Religious Education Committee, ARE Committee, the UU Housing Group, Membership Team, Covenant Group facilitators, and the UUC staff.

In July, the Planning Team followed up with the same groups with a request for written responses to the following three questions:

- As you dream about what programming your group could offer UUC members and friends in the next 5-10 years, what kinds of physical space would you need in order to accomplish your goals?
- What kind of staff support would allow you to fulfill your dreams?
- Are there other kinds of resources that would be important to your future efforts?

The information received from these groups is too rich and lengthy to try to summarize, but notes are included as Supporting Document C.

Congregational Survey: April 2011

Responding to the survey were 475 members and friends, or 57% of our membership. The respondents were fairly representative of the congregation as a whole. 70% of respondents were female, 30% male. 70% of respondents do not have children under 18 years of age living at home. A third were between 51 and 65 years old, 25% were 36 to 50 years old, another 25% were 66 to 80 years old, and the remainder were <36 years old (9%) or >80 years old.

Respondents were fairly equally divided between being affiliated with UUC for 1 to 5 years, 5 to 10 years, 10 to 20 years, or more than 20 years. Half of respondents come to UUC nearly weekly, 20% twice a month, 20% once a month or less, and 6% are not currently attending.

A brief overview of results follows:

- About 85% of respondents are satisfied with “UUC as a church for you.”
- About 85% of respondents are satisfied with his/her own contribution to UUC.
- 90% keep coming to UUC because of the ministers and Sunday morning services, 83% because of personal spiritual development, and 70% either because of relationships at church or the church’s social justice efforts.

- Most respondents have not considered leaving UUC (>60%), but 20% have found difficulty feeling connected to the community. Of those age 36 to 50 years old, 53% have considered leaving.
- In reflecting on the growth of UUC, the overwhelming majority of respondents (about 80%) are inspired by the social justice impact a larger church could have, are excited about meeting new people, and are eager to share Unitarian Universalism with those who join us. When thinking about growth, 20% are concerned with space issues, especially those who are younger than 35 or older than 80, of whom about 40% in each group were concerned about space. Those not coming to church currently are also concerned about space issues at 35%.
- Most – 57% – felt space had not been an issue. Events affected by space constraints are all-church events, Sunday morning services, and coffee hour.
- There is no consensus among the respondents about whether adding a third service is a desirable way to manage growth issues, with responses split fairly evenly between disagreeing, agreeing, or being neutral to that idea. There is also no consensus about when this service should occur or what format it would take.
- As a religious community, the majority of respondents (60%) felt UUC should focus on community building, followed by personal spiritual growth (26%).
- In terms of social justice issues, 40% of respondents felt that UUC should focus primarily on making significant impact on a few issues or problems. 28% felt the focus should be on empowering members to act on their own social justice convictions.
- Overall, respondents felt that UUC should focus on Sunday morning services, local social justice efforts, and children/youth religious education. For those without children at home, the third most popular response was a focus on small group ministry.

Full results of the congregational survey are included as Supporting Document D.

Interviews with Community Leaders: May to June 2011

With the help of several UUC members, the team gathered data from interviews with several key community leaders: District Executive of the Pacific Northwest District of the UUA; Senior Vice President of Community Services of United Way of King County; Human Services, Health and Housing Policy Advisor of the Office of the King County Executive; Dean of the School of Social Work at the University of Washington; and Dean of the School of Theology and Ministry at Seattle University.

Each leader was asked three questions, and highlights of their responses follow.

1. What impressions do you have of UUC and/or its leaders?

- UUC seems to be coming into its own at this point under Jon Luopa's ministry.
- Seen as a warm, "reasonably welcoming" congregation, more formal than some
- Congregation seems constrained by physical space, with building itself somehow inward-focused.
- Feels a bit conservative
- Seeing signs of leadership among area UU congregations
- Have some concerns about its stewardship
- Welcoming to diverse groups
- "Brave and cutting edge" in its justice work over the years.
- A liberal voice in the community
- Jon Luopa as strong leader, highly intelligent with good insights, socially responsible, "shares his social capital."
- Congregation involved with social justice, committed to the "spirituality of faith"

2. What trends and challenges are you seeing in our community today?

- Ground under us seems a little shaky and uncertain: changing systems, how we look at things, life security systems, political systems all changing – lots of anxiety
- Seem to focus much more on "How can we work in the present when we feel insecure about the future?"
- How can we provide resources to an ever-broader community of ethnic, racial, and cultural groups? The middle class is shrinking and less able to respond to needs.
- Public sector services less and less able to respond to the level of need which is creating a "crisis situation"
- Need a "revolution for caregivers" that provides living wages and support for those who provide loving service to vulnerable populations
- Connections by younger adults and teens are increasingly virtual, not as much face to face
- Ability to connect with people on a worldwide basis continues to grow and expand
- Poor seem forgotten – a challenge to connect folks in need with those who have resources
- Not closing gap between "haves" and "have-nots"
- Economy is in a "reset" and will not return to pre-2007 levels
- Too many youth leaving school without necessary skills; need to help families better prepare their children for school
- Must change cycle of poverty by ensuring that "kids of color believe that they can succeed" and making that hope real
- Homelessness is a sign of our failure and we need to improve access to jobs and healthcare for all.
- The media are "tone deaf" to the spiritual community.

3. What unmet needs do you see in our community, and are there any ways in which religious institutions are uniquely suited to respond to such needs?

- Teaching empathy and compassion at a young age seems important.
- Can we help people develop deeply personal responses, maybe through concept of “multiple identities” to a very pluralistic culture?
- As agency communities will be challenged by a lack of resources and significant demand, churches can establish self-help networks for their members and form alliances with nonprofits, schools, and other churches to form “hands-on collaborations to help people at risk” (One America and the YWCA are examples of partnership organizations that work well with community groups to address immigration and homelessness issues.)
- Mentoring of children and youth will need to grow.
- We must all “own the challenge” and act as a wider community if we are not to risk reversing progressive social policy and returning to 1960 levels.
- Churches can be leaders in action needed at the local and state level, which involves all of us.
- Provide significant leadership to help people address the uncertainties.

Creation of Mission/Vision Statement: July to November 2011

During the summer of 2011, the Planning Team worked to integrate all that we had heard and discerned over the past year into draft mission and vision statements. A number of drafts were created with thoughtful feedback from the Board and Dan Hotchkiss. Finally, on October 1, a draft was presented to a group of UUC leaders for their feedback. That same weekend, Jon presented the mission and vision draft statements in his sermon, with opportunities for talkbacks from the congregation following both services. An additional draft was created after the team discussed the many thoughtful comments received. This draft was presented to the Board for its endorsement at the October Board meeting. The final version was presented to the congregation for a vote at a special congregational meeting called after the second service on December 22, 2011. After presentation of the new mission and vision statements, a motion was made to approve the statements as submitted by the Planning Team. The motion was seconded and approved unanimously.

UUC Building Use Reports: September 8, 2011; Capacity Addendum January 3, 2012

At the end of June 2011, the Planning Team asked the executive staff of UUC to develop a building use survey. The purpose of the survey was to provide “a thorough assessment of current use patterns and capital maintenance needs.” The Planning Team provided some sample questions that such a survey might address, the answers to which would help them lead the congregation through productive conversations about the church facilities and how they do – or do not – map to the congregation’s current needs and its vision of itself in the future.

Byron Krystad, UUC Director of Operations, assembled a task team from the members of the building advisory group to pursue the information needed for such a survey. Joining him were Carolyn Rasch, Michael Wearne, Sharon Loveland, and David Bauman. All four of these members have extensive experience in their careers with commercial building design, assessment, and maintenance, as well as involvement in the church itself. Eric Denny, AIA, contributed his architectural expertise to a second report containing a “Capacity Addendum,” an effort in which Frank Metheny also participated. This report was provided on January 3, 2012.

Together, these reports addressed both deferred maintenance and building capacity issues. They included original plans, recent physical evaluations and new interviews, data analysis, and architectural/zoning reviews. Both reports included compelling data supporting significant maintenance needs, as well as limited capacity to meet even our current building-use needs.

Too complex to be summarized, the full reports are attached as Supporting Document E.

Leadership Kick-Off Day October 1, 2011

In addition to providing feedback on the draft mission/vision statement, the leaders gathered for Leadership Kick-Off Day on October 1. They provided the Planning Team with their best thinking on the following question, based on a presentation of highlights from the UUC building use report:

Since we will need to address delayed maintenance in our existing facility and be creative about imagining new configurations of space in order to realize our vision, what process do you, as leaders, recommend we follow with the congregation to get a good result?

The results helped to provide guidance to the Planning Team and the Board in preparing for a discussion with the larger congregation regarding UUC space issues.

Summary of the discussion is included as Supporting Document F.

Afternoon with Dan Hotchkiss and UUC Leaders: Discussion of Draft Outcomes, February 26, 2012

On Sunday afternoon, February 25, 2012, a group of approximately 30 people – invited current or past committee chairs, Board members, and Planning Team members – met with Dan Hotchkiss as facilitator to hear and respond to Planning Team drafts of “Strategic Outcomes for 2012.” Participants were briefed and provided written materials prior to the meeting on a summary of the current status and issues related to UUC’s building. Feedback was invited on all of the outcomes, with specific focus and conversation on the outcomes related to growth and expansion/rebuilding/relocation options to deal with our current space limitations.

Supporting Document G includes notes from that meeting

Congregational Feedback on Draft of Five Strategic Outcomes: April 2012

The Planning Team worked for several months on a number of drafts of the outcomes. In late March, the most recent draft was posted on the UUC website, with an invitation to the congregation to provide feedback. In addition, Planning Team members staffed a table in Nathan Johnson Hall between services and after the second service on April 1 and 8, with copies of the outcomes available for review and comment. The Planning Team then considered this feedback, drafted another version, and met with the Board for discussion at a study session on April 11. The Board then voted to approve the team's recommendations.

Analysis from 2010 U.S. Census Data: Provided by Richard Morrill, Urban Geographer and Long-time UUC Member

The Planning Team reviewed a January 15, 2011 memo that summarized census data in relation to changing characteristics of UUC membership from 2000-2009, and later met with Dr. Morrill as part of the data-gathering related to UUC growth.

A summary of Dr. Morrill's demographic analysis is included as Supporting Document H.

Findings and Strategic Outcomes Concerning Growth and Church Space

We heard during the Year of Discernment that people cherish the experiences, values and hopes that are alive at UUC and want to share those with more people. We have an opportunity to embrace growth in three ways into a new phase in the life of our congregation: spiritually as a more deeply connected community; through expanded work for justice; and by becoming a significantly larger community of children and adults.

We considered a number of factors related to growth in arriving at the strategic outcomes. These growth-related factors are summarized as follows:

We must address the challenges relating to deferred maintenance of our building.

The analysis of our facility produced the conclusion that we have delayed necessary improvements for too long. At some point, delayed maintenance becomes an issue that cannot be ignored any longer, and UUC is at or close to this point within several areas. Catching up on the deferred maintenance will require a significantly larger investment than we currently allocate during our annual budgeting process.

In some areas we are already at full capacity.

In thinking about growth, it's tempting to frame the question as if we can choose to grow or to not grow. The fact is that in the past six years we *have* grown and we *are* growing. The real question is how we will respond to the growth we are experiencing. We think we must consider this question along with a frank assessment of our present situation and needs.

According to our planning consultant, once a church is at 80% of its capacity, visitors frequently feel there is no room for them. Growth tends to plateau and may then decline. Our chapel feels full (by this 80% rule) at 250 worshippers. Since the start of the 2011-2012 church year, 40% of our services have exceeded this number. Nearly all classrooms are above 2/3 full and many are over-capacity. Congregational survey responses and other forums indicated concern about the lack of adequate parking.

Demographic trends and projections bode well for UUC's future growth.

According to UW Demographer Dick Morrill, our area is expected to continue growing, particularly with professional, highly-educated households, which aligns with our typical demographic well. We therefore believe that our current growth rate could be sustained for 10 years or more.

Our space does not serve us well.

We also know that the spaces we do have now do not serve our needs well. The latest building assessment summarized maintenance needs including interior and exterior painting, classroom and kitchen cabinetry repairs, worn carpets and, more significantly, all windows are in need of repair or replacement, and inadequate maintenance of the wood siding has resulted in an unknown degree of water damage. In addition our space doesn't always align with our needs. We lack the right kind of space for all-church gatherings, youth programming, and contemplative and communal gathering activities. Our storage space and kitchens are insufficient, and our technology is behind. Meeting rooms of needed sizes are not available at times that are convenient to members engaged in the work of the church. Stretching the rooms we have as much as possible requires significant administrative effort, which stresses the staff and reduces the program work they can do.

Congregational feelings about growth

The all-church survey clearly indicated general support for growth in the congregation, particularly the expanded social justice impact a larger church can have and the opportunity to share UU values with more people. The excitement we felt from the congregation during the Year of Discernment was palpable. The unanimous adoption of our new mission and vision statements demonstrates that the congregation engaged fully in the process and is energized by the result.

We know that some people are concerned about growth. Some people feel that services are already too large to know everyone who attends. We believe that it is important for people to be connected to some sort of smaller group within the larger church, and one of the recommended outcomes in the report is designed to address this.

The planning team also recognizes that parts of the church are historically significant. Any changes which are considered need to honor the integrity of the space.

If we want to take our newly-approved mission seriously, we need more and better-suited spaces.

Computing the capacity of a church building can be complicated. Many factors—seating, parking, social space, classrooms and meeting rooms all play a role in determining how many people can call a given building home.

UUC has reached a point where by most of these measures, it is full beyond capacity. Parking is the most obvious choke point for most people. Parents may be most aware of the shortage of classroom space. Lay leaders and church staff know that there is a serious lack of meeting space. Sanctuary seating feels happily full, rather than overcrowded. Only in that awkward hour from 10:30 to 11:15, when the early and late congregations meet in the social hall does the situation become obvious to everyone.

The danger for UUC is not simply that building capacity limits the congregation's growth—at some point that is inevitable. The risk is that the current situation, under current cultural conditions, will foster a more passive congregation. A highly attractive Sunday worship service plus inadequate space for people to socialize, encounter one another in small groups, and work together on joint projects will produce, in the long run, an audience, not a congregation.

A building project is a hard bullet to bite, and the fact that UUC's building needs major renovation whether it expands or not makes it only a bit easier. This strategic plan calls UUC to enlarge its capacity to touch and transform lives.

Dan Hotchkiss

The options

There are five main strategies for dealing with growth. They include the following. Note that the selection of the desired choice must account for the deferred maintenance challenge we currently face.

1. Do nothing. This is the easy way (in fact, it is what we have been doing), but it is getting to be an unsustainable choice. Our building has quite a large maintenance deficit and requires hundreds of thousands of dollars of repair just to remain standing. It is clear to all that it has deteriorated significantly and feels very faded and dated. The fact that we are growing despite this is remarkable.

2. Spin off new congregations. This was the UUA's preferred strategy for many years, and UUC has spun off multiple congregations in the past (including Edmonds and Shoreline). This strategy works as long as significant groups of people come from remote areas unserved by a UU congregation. That is no longer the case. Note that when this was done, it was not *newcomers* who would go start the new church, it was the people who lived in the remote area. Also, the survey responses indicated the strength of our ministers was a key reason for satisfaction with UUC, so we do not believe there would be much interest in creating a new experience elsewhere. Also, doing this does not address the major repairs our current facility will require.

3. Satellite churches. Large congregations can have large buildings, or they can have multiple buildings in different neighborhoods. Folks who live in Wedgwood could continue to come to

UUC, for example, but those in Ballard could be asked to attend at a UUC facility there. Ministers might rotate traveling there or sermons/services could be transmitted via teleconference technology. This approach works best when the congregation is widely dispersed and does nothing to reduce budgetary, staffing, and leadership needs. In fact, it generally makes them more complex. We did not discern any interest in such an arrangement. Also, doing this does not address the major repairs our current facility will require.

4. Remodel and/or expand our current facility. We might be able to do a remodel and expansion on the current property. We would need to select an architect who could help us preserve the existing chapel while reconfiguring the space as a whole and adding in a way that created the kinds of space we need. Obviously, parking is a question, as is the future of the Tudor houses. A new chapel built on or over the parking lot could have an incredible view of Mount Rainier. As we did the remodel, we would be naturally replacing things we would need to repair in the first 3 options.

5. Relocation to another property not too far away. If expansion and remodeling is cost-prohibitive and if we were to find another property that had good parking and was convenient to transit and not so far away as to be too inconvenient for the congregation, it might be more cost-effective to leave our current building with someone who would love it as much as we have and to build our next chapter elsewhere.

The planning team recommends that the implementation teams explore the last two options and that the congregation is informed and involved in the process of thinking about these decisions as we move forward. Just as the Year of Discernment was about bringing issues to the congregation and letting it do the thinking, so will be this building project.

Next Steps: Implementation

The outcomes articulated in this plan are achievable, but will require patience, persistent commitment, and dedicated resources. The Planning Team forwards this report in the confidence that these will be forthcoming, that UUC's staff executive team, Board of Trustees, and lay leadership will work together, making the necessary investments of effort and financial resources required for UUC to become the embodiment of our mission and vision. Toward this end, and with the guidance our consultant offers based on previous successful planning efforts, we envision the following steps toward implementation.

1. **Board approval of strategic plan.** The Board of Trustees plans to vote on whether or not to approve the strategic plan at its April 19, 2012, meeting. At this point, the Planning Team will have completed its work, and handed the plan over with great confidence in those who will work to implement it. Individual members of the Planning Team may be involved in helping to carry out the plan as Board, committee members or volunteers but the team will come to a formal end. The plan now must live within the congregation.
2. **Board charge to the staff executive team.** Assuming Board approval, the board will then charge the staff executive team with preparation for implementation. The staff team will be charged with determining the appropriate number of implementation teams, recruiting and appointing lay members to work with staff on those teams, clarifying the role of the teams, setting priorities (e.g., in the first year we will do these things and not these) and timelines, and establishing year-by-year benchmarks for the work toward the achievement of the five strategic outcomes. Staff will also make recommendations for the budgetary implications for achieving each of the outcomes.
3. **Implementation plan to Board for approval.** Executive team will present an initial implementation plan, as soon as feasible, for Board approval. After reviewing and approving the draft strategy/timeline/budget plan for implementation, the Board will establish year-to-year benchmarks for the implementation work. We envision that the work involved in pursuing the outcomes will cover a broad spectrum of timeframes.
4. **Recruit implementation teams.** We anticipate that the recruitment of members of the implementation teams will occur during the summer of 2012, with the teams ready to begin work in the fall of 2012.
5. **Orientation/leadership training.** The Executive Team will assume responsibility for an orientation and leadership training event for all teams in early fall, 2012, as the teams prepare to launch their work.
6. **Coordinate with existing committees.** The implementation teams are charged with overall coordination of progress toward achieving the five outcomes; this work will be shared with the many ongoing committees and groups engaged in the work of the church. Roles and relationships should be clarified early in the implementation process. One

suggested strategy is for each implementation team to approach committees whose work is relevant to that implementation team's work, asking in which piece of the overall work the committees would like to engage.

7. **Ongoing Board monitoring.** While the staff executive team has the responsibility for determining and implementing specific strategies for accomplishing the outcomes, the board of trustees plays a critical role in the ongoing monitoring of the implementation teams' efforts, reviewing the benchmarks set in order to insure continual progress toward the goals. For the plan to fully live, Board decisions over coming years need to be guided by the mission and vision statements, and by a consistent focus on the progress toward achieving the strategic outcomes.
8. **Communication with the congregation.** It is anticipated that the implementation teams and Board will communicate regularly with the congregation about ongoing work and progress toward the strategic outcomes. Annual budgets will, as always, require congregational approval, and any major decisions related to building and space needs and capital campaigns will be taken to the congregation for discussion, direction and approval.

We conclude this report with Sara Moores Campbell's words with which we concluded our
Planning Team meetings

“We receive fragments of holiness, glimpses of eternity,
brief moments of insight.

Let us gather them up for the precious gifts that they are,
And, renewed by their grace, move boldly into the unknown.”

Respectfully submitted by the Planning Team:

Kristin Guest, Chair

Anne Eacker

Rev. Jon Luopa, Senior Minister

Michael McDaniel

Dave Mentz

Katie Renschler

April 2012

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Alice Arrington, President 2010-2011

Rochelle Coffee, President 2011-2012

Rietta Stoneman, Vice President 2010-2011

Joan Fuller, Treasurer, 2012-2011; Vice President 2011-2012

Jack Lattemann, Secretary 2010-2012

Anne Eskridge, Treasurer 2011-2012

Barbara Alexander, Trustee 2011-2012

Sheila Capestany, Trustee 2010-2011

Mike Kasprzak, Trustee 2011-2012

Bert Kirby, Trustee 2011-2012

Michael McDaniel, Trustee 2010-2012

Frank Metheny, Trustee 2010-2012

Andrew von Nordenflycht, Trustee 2011-2012

Kelly Dumas, Moderator 2010-2012

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Program Staff

Beth Herrild, Director of Lifespan Faith Development

Anne Garrett and Melody Moberg, Lifespan Children's Program Coordinator

Fred Capestany, Lifespan Youth Program Coordinator

Jennifer Bright, Social Justice Coordinator

Karen P. Thomas, Director of Music

Stephanie Kallos and Amanda Huntleigh, Intergenerational Choir Directors

Administrative and Support Staff

Byron Krystad, Director of Operations

Donna O'Leary, Office Administrator

Bailey Jensen, Membership Assistant

Ryan Claxton, Custodial Lead

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