



## **Next Steps Report First Parish Chelmsford, MA, Unitarian Universalist**

### **INTRODUCTION**

This report presents the results of a Next Steps Weekend (NSW) with First Parish Chelmsford, Unitarian Universalist (First Parish). The visit was conducted by Barry Finkelstein, a Unitarian Universalist Association (UUA) Congregational Stewardship Consultant. This report is based primarily on an intensive weekend on site at First Parish, during which Barry met with the Standing Committee, Minister, staff, and other lay leaders and congregants in multiple sessions, and presented his findings and recommendations at a well-attended open meeting.

#### *Objectives of the Visit*

First Parish indicated the following objectives for the NSW:

Most important, help us continue vision and mission regarding our "ministries" and identify how our physical plant helps accomplish those. Secondly, an assessment of what funds we could expect to raise and approach to doing so if we decide to go forward. We need to learn how to move from "big ideas" to taking the risk to actually implement, how to discern what to do and how to do it.

#### *Advance Contacts*

Barry spoke in advance with Rev. Ellen Spero, First parish Minister and Karen Bellavance-Grace of the Region/District staff, and had two conversations and several email exchanges with Tom Coffey, Chair of the Next Steps Task Force. Barry also received and reviewed substantial information on finances, membership, ministries, programs, staffing, and recent annual reports.

#### *Visit Schedule and Process*

The schedule for the weekend visit is presented as Appendix A. During the Friday and Saturday sessions, Barry met with the Minister, Staff, Capital Campaign Committee, Standing Committee, past Standing Committee chairs, and leaders of various program areas. He led a stewardship/capital campaign workshop on Saturday afternoon attended by approximately 40 people. He participated in the Sunday morning worship service, delivering a brief reflection about next steps (included as Appendix B). Forty-two people completed a brief survey; the form is in Appendix C and the results are in Appendix D. He delivered his oral report to a well-attended public forum on Sunday afternoon.



### Basic Data (2014)

Name and Mailing Address of Congregation	First Parish Chelmsford, Unitarian Universalist 2 Westford St, Chelmsford, MA 01824-2608
Website Address	www.uuchelmsford.org
Dates of Visit	April 11-13, 2014
Minister	Rev. Ellen Rowse Spero
Key Leaders	Deirdre Heck, Chair, Standing Committee Tom Coffey, Chair, Next Steps Task Force
Number of Members	220 (Most recent UUA certification)
Fiscal Year	July 1 to June 30
Operating Budget	\$305,000 (Current Year, FY 2014)
Annual Financial Commitments	\$221,000 (108 household donors) = 72% of operating budget
Average Financial Commitment	\$1,800 (mean) \$1,200 (median)
Quartiles	1 <sup>st</sup> : 8 households, 7 % 2 <sup>nd</sup> : 14 households, 12 % 3 <sup>rd</sup> : 25 households, 21 % 4 <sup>th</sup> : 73 households, 61%
Endowment (Permanent Funds)	\$1.5 Million
Approach to Annual Budget Drive	A mix of largely passive techniques
Summary of Recent Capital Campaigns	Most recent was a small campaign to repair the steeple. Last major campaign might have been in the 1950s to build the “new” wing.

### FINDINGS AND RECOMMENDATIONS

The following subsections present: (1) a review of what is going well at First Parish – commendations; (2) considerations about stewardship and capital campaigns; (3) summary of survey results; and (4) recommendations.



### *Commendations*

One benefit of the Next Steps process is holding up a mirror for the congregation to see some of its strengths that can be the basis for successful stewardship and a capital campaign. I call your attention to the following commendations:

- ***Strong sense of community*** – I heard powerful and moving stories about people taking care of one another, and sustaining a vital, compassionate, spiritual community. The survey results bear this out as well, with welcoming and loving people and sense of community and generosity of spirit all among the top responses. People are proud of First Parish’s diversity in age and socio-economic status, and of its 2007 certification as a Welcoming Congregation. Survey responses indicated strong professional and lay leadership, supporting and being supported by your strong community.
- ***Innovations and best practices*** – I was impressed by the congregation’s ability to introduce new programs and initiatives, such as the Sunday evening worship service, improvements in governance with a congregational covenant and human resources policies and procedures, new membership and nurturing initiatives like mentoring and caring connection and pastoral care associates, and renovation of the chapel and parlor, which entailed addressing differences of opinion. You clearly demonstrate an ability to make decisions and get things done.
- ***Beautiful, historic, prominent building and location*** – and you are evidently good stewards of your facilities as the buildings and grounds look well-cared for. You have taken steps to modernize and improve accessibility with an elevator and accessible bathroom.
- ***Rich worship and programming*** – Among the strengths noted in the survey responses worship, music, life-long faith formation, and a recent deepening of commitment to social justice including service trips to New Orleans and Table of Plenty, making excellent use of your large and well-equipped commercial kitchen. I was impressed with the enthusiasm for your religious education offerings including OWL and Coming of Age. And my experience Sunday morning indicates that you know how to “do church” – next time I’ll check out one of your Sunday evening services which I heard so much about.
- ***Good financial stewards*** – you have solid finances, balanced budgets, generous annual giving, no debt, and a healthy endowment. You have decided consciously to use the income from the cell towers for items other than routine operating expenses –facility maintenance and faith in action. And you are generous as a congregation. This track record of good financial stewardship will serve you well should you pursue a capital campaign.
- ***Progress*** – You have taken useful steps to address your facility needs, including identifying key drivers (accessibility, welcoming space, some expansion, and reconfiguration), developing a Long Range Plan, and engaging an architect to develop the



plans of your grandest dreams. And most recently, you initiated the Next Steps process to help you reach a formal decision about whether and how to proceed, and most important, to tie that decision to your mission, vision, and ministries. I was impressed with the congregation's engagement in the process during my weekend with you.

These strengths provide a foundation for the future and will surely inspire ongoing commitment and generosity.

### *Considerations*

In my oral report, I provided an overview of capital campaigns, and noted the following considerations:

First, recognize that no decisions have been made. While you have made progress, it is now time to come together in a focused process that will lead to a decision, ideally one that everyone will embrace. Your aim of having a decision by the 2015 annual meeting is reasonable; I am a believer in moving toward a decision as rapidly as possible so momentum and enthusiasm are maintained, consistent with engaging large numbers of congregants and exploring issues and options thoroughly.

Second, capital campaign are a once-a-generation opportunity to come together as a community and invest in Unitarian Universalism and First Parish. The goal is not merely to raise money and carry out a building project, but to ensure a strong future for the congregation and provide the facilities needed for the critical ministries you will live out over the foreseeable future.

Third, success depends on broad and deep participation, ideally with 100% of your members making a financial commitment. While much is said about the importance of major donors, and this is certainly true, it is equally true that every contribution is vital, and reaching for 100% is a major success factor. As you proceed, you will be able to learn how to reach out and include everyone and share stories about how people can find ways and means to contribute.

Fourth, most congregations conduct combined annual/capital campaigns, as this is more efficient than separate campaigns some months apart, and I recommend this approach for you.

### *Summary of Survey Results*

As shown in Appendix D, the two most mentioned milestones are the calling of Rev Ellen and becoming a Welcoming Congregation. Other milestones focused on recent efforts such as creating a covenant and new social justice initiatives as well as historical events including the founding in 1655. While most respondents indicated a preference for growth, the largest number of people prefer a relatively slow growth rate of 5%, with 10% being the second most frequent response. The two most prominent strengths were the people and the minister and staff. Many of the strengths indicate a deep sense of community, one that is generous of spirit, compassionate, spiritual, and diverse; and with committed leadership. Programs such as religious education, music, and social justice were prominent among the strengths. Not



surprising given the context of the weekend, the most significant challenges concerned the facility, including accessibility, safety, capacity, flexibility, and of course parking. Others included being visible in the community, managing growth and change, and issues around membership, retention, diversity, and leadership development.

### ***Recommendations***

#### **1. Continue the conversation**

There was much richness and depth and joy in the conversations among you during my visit. People relished the opportunity to share personal stories and to explore new ideas about congregational life. Keep this going by making this report widely available and providing opportunities to widen and deepen the discussion. Use electronic communication mechanisms as well as small and large group gatherings for this ongoing conversation. And make an effort to talk with one another often and share your views about stewardship, your dreams for the future of First parish and its mission and ministries, and yes, about the money it will take to get there.

#### **2. Create a common vision**

As noted above, you have done much good work to get ready for a building program and capital campaign. An important next step is to clarify and document a vivid and inspiring vision of what First Parish could be like if you are successful. The vision would describe your key ministries, indicate the scope and scale of your programs, and provide a basis for developing and considering alternative building plans and budgets.

The UUA's Searching for the Future (SFTF) is a wonderful process for helping congregations do just that. The magic of the process is that it takes place in one intensive weekend, in which as many congregants as possible participate in workshops facilitated by trained congregants. The energy and enthusiasm generated create a palpable "buzz" and help build momentum for future steps. I recommend that you consider SFTF for the Fall of 2014. Appendix E is a summary of the process.

#### **3. Adopt a new approach to next year's Annual Budget Drive (ABD)**

Use your next ABD (canvass) to introduce new methods and lay the groundwork for a combined annual/capital campaign. Base the campaign on the principles and best practices presented in Beyond Fundraising, by Wayne Clark, emphasizing the following key elements:

- ***One-on-one stewardship conversations to reach as many people as possible*** – direct, personal engagement is the most effective way to invite people to become more committed to the congregation and to inspire their most generous and joyful giving. The participants in the Saturday afternoon workshop demonstrated that they could all conduct these conversations, sharing their stories and their passion for First Parish. Recruiting as many visiting stewards as possible will enable you to reach a sizable number of congregants during the campaign. Questions were raised during my oral report about whether these conversations would unduly pressure people, especially those of limited means, and



whether First Parish risks losing its prized economic diversity. The experience of the UUA stewardship consultants suggests the opposite: people generally welcome the chance to participate in these conversations, and often low and moderate income people are honored to be invited to participate. We also find that lower income folks often give at higher levels in terms of percentage of income.

- ***Plan and organize the work and involve many people*** – establish a leadership team to involve a diverse group of people, including newer members. Begin planning six months in advance and develop a detailed timeline and clarify roles and responsibilities. Differentiate between tasks that can be done by one or two people, and those that require “committee work.” Recruit people via direct personal appeal, noting specifically why you think each one is just perfect for the role you have in mind. And when recruiting for any roles, note how well organized you are, making it easy for everyone to do their jobs. Finally, thank people often for their work.
- ***Focus on communication*** – emphasize two messages: (1) explain why we’re using one-on-one conversations so people will be more receptive to their visiting stewards; and (2) make the case for why everyone should be as generous as possible *right now*. And it is important to deliver these messages over and over and using all the vehicles, voices, and media at your disposal: written materials, email, the website, Sunday morning displays, brochures, letters, and messages from the pulpit.
- ***Recruit, train, support, and thank the visiting stewards*** – enlist as many volunteers as possible to serve as visiting stewards. When recruiting visiting stewards, emphasize the nature of the conversations, which are not primarily about money, but about our passion for First Parish, and that this process is an important step toward a successful capital campaign. Also, emphasize that you will provide training, materials, and support, and that visiting stewards will be asked to make only four visits, and their work will be very time-limited (3-5 weeks). Finally, thank the visiting stewards often for their work.
- ***Assess lessons learned*** – at the end of the campaign, convene a fun gathering of everyone who participated and express thanks and solicit feedback on all aspects of the campaign. Document what worked especially well and what could be done better.

#### **4. Prepare for a Building Program and Capital Campaign**

To prepare for and conduct a successful combined campaign, focus on two parallel tracks: (1) building/facility plans; and (2) finances/capital campaign. I recommend that you charter two task forces to proceed in tandem, work closely together, and engage the congregation regularly.

- ***Building Planning Task Force*** – following the visioning exercise, this group would define facility needs and solutions. Determining the proper scope is an iterative process of engaging the congregation, researching solutions and costs, and refining plans to meet



requirements and scale to likely available resources. Define the key drivers and priorities including accessibility, “greening” of the facilities, improved use of modern technology, expansion and redesign of various spaces, and deferred maintenance items. Link the building plans to your Long Range Plan and to your mission and vision.

- ***Capital Campaign Task Force*** – this group would work on the financing side of the process, developing a long-range (5-year or more) financial plan and taking steps to move toward a potential capital campaign. Begin with preliminary ranges of how much might be raised in a capital campaign (3, 4, or perhaps 5 times annual giving, which would come to as much as \$1.1 Million based on your current annual giving of \$220,000). Add to this an amount you might borrow, and use those figures to bound the building planning options. As the plans take shape and momentum builds, contract for a financial feasibility study (FFS). The FFS, which is based largely on confidential one-on-one interviews by an outside consultant, will give you a solid picture of the depth and strength of support for the building project; will surface any lingering issues that should be addressed; and will provide a reasonable estimate of how much money the capital campaign is likely to raise.

The above efforts will require extensive engagement with the congregation. I urge you to provide numerous and diverse opportunities for conversation, learning, debate, approvals, etc. A detailed communication and engagement plan, addressing both building and financing plans, should be developed as soon as possible.

## **5. Grow your endowment**

It is wonderful that you have a healthy endowment of approximately \$1.5 Million. I recommend that you become intentional in growing the endowment through an active planned giving program that informs congregants and encourages them to include First Parish in their wills and estate plans. A good way to do this is to solicit interest during the annual budget drive and at other suitable opportunities, and then invite interested people to an information seminar. To encourage comfort talking about money in church, you might also consider other money-oriented seminars on topics people will value, such as retirement planning, saving and paying for college, funding new businesses, personal philanthropy, etc.

I suggest you also examine and perhaps refine the stated purpose of the endowment to ensure that it inspires generosity and is working in service to your mission. Ask how the endowment supports the ministries of First Parish. Does it do more than support the operating budget? Should it? Does it promote innovative new ideas and provide seed money for new programs?

Finally, I urge you to explore the UU Common Endowment Fund (UUCEF), which pools endowment and trust funds from many congregations. The fund currently has \$165 Million in assets, thus enabling low administrative fees and providing a strong vehicle for socially responsible investing and shareholder activism. Information on the UUCEF is available on the UUA web site ([uua.org](http://uua.org)) and from the UUA treasurer.



## PROPOSED NEXT STEPS AND CONSULTING SUPPORT

The following table provides a timeline for the major activities noted above, and also identifies specific areas where UUA stewardship consulting would be helpful. The table also provides estimated levels of effort and cost for each activity. UUA consulting fees are \$1,800 per day which is all-inclusive of labor and expenses. We charge only for time worked and for time spent one-way in transit. If you were to use our services for all of the work listed below, the total cost would be approximately 2.5-3% of the total amount you would expect to raise in your capital campaign.

If you elect to continue with my consulting services, I would work with you to plan and scope out each element of the work along with a budget. I would keep you informed of progress and resource expenditure along the way to ensure that my time and your money are spent wisely and in accordance with your needs and wishes. I would also be able to help you with endowment and planned giving.

Activity/Milestone	Timeframe	UUA Support
Common Vision – Searching for the Future	Fall 2014	<ul style="list-style-type: none"> <li>Advance preparation and tailoring and onsite time to facilitate the weekend.</li> </ul> 2.5 to 3 days, 1 visit Cost: \$4,500 - \$5,400
2015 Annual Budget Drive (ABD) – based primarily on one-on-one conversations	Planning Fall 2014 Execution Winter/ Spring 2015	<ul style="list-style-type: none"> <li>Assistance with planning, organizing, recruiting, and communicating with the congregation about the new approach</li> <li>Orientation/training session for visiting stewards</li> <li>Assistance with execution and lessons learned evaluation</li> </ul> 2.5 days, including 1-2 visits and email/phone support Cost: \$4,500
Financial Feasibility Study (FFS)	Spring 2015	<ul style="list-style-type: none"> <li>Approximately 24 onsite interviews, analysis, preparation and presentation of report</li> </ul> 5-6 days, 2 visits Cost: \$9,000 - \$10,800
Reach Decision	Spring 2015	NA. Note that decision step could precede FFS
Combined Campaign for Late 2015 through Spring 2016	Planning Fall 2015 Execution Winter/ Spring 2015-16	<ul style="list-style-type: none"> <li>Similar to support for 2015 ABD, with additional effort required for capital campaign</li> </ul> 3 days, 2-3 visits Cost: \$5,400



## CLOSING

I was very impressed with First Parish and enjoyed my weekend with you. You have done great work to get where you are and you recognize the key next step of linking building and capital campaign plans to a common vision rooted in your mission and ministries. I have no doubt that you can come together to do this work and reach a decision that will make you proud.

It has been a pleasure and an honor to work with you for the Next Steps Weekend, and I would welcome the chance to help further as you move into your future.

Faithfully submitted,

A handwritten signature in black ink, appearing to read "Barry P Finkelstein".

Barry P Finkelstein  
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Delivered to:

Deirdre Heck, Chair, Standing Committee  
Rev. Ellen Spero, Minister  
Tom Coffey, Chair, Next Steps Task Force

Copies to:

Dr. Wayne Clark, Director, UUA Congregational Stewardship Network  
Brent Jurgess, Administrator, UUA Congregational Stewardship Network  
Rev. Sue Phillips, UUA Regional Lead for New England  
Karen Bellavance-Grace, Director of Faith Formation, UUA Mass Bay & Clara Barton Districts



## Appendix A Next Steps Weekend Schedule

### Friday April 11<sup>th</sup>

- 5:30-7:00 Meetings with Rev Ellen Spero and staff, Facility tour
- 7:00 Potluck [Vestry]: Standing Committee and all Saturday participants are invited to attend:

### Saturday April 12<sup>th</sup>

1. 9:00 to 9:45 am Former Standing Committee Chairs
  2. 9:45 to 10:30 am Financial Pod  
Finance Committee, Canvass, Board of Investment
  3. 10:30 to 11:15 am Programming Pod  
Worship, RE Council, Social Action Council, Music
  4. 11:15 to 12:00 Miscellaneous Pod  
Welcoming Congregation, Human Resources, Membership, Long Range Planning, Nominating, Grounds
- Noon to 1:00 Lunch
- 1:00 to 3:00 Seminar with Barry

### Sunday April 13<sup>th</sup>

- 10:45 Worship: Barry to offer a reflection
- 12:15 --1:00 Barry's oral report
- 1:00 -- 1:30 Wrap-up meeting



**Appendix B**  
**Moving Forward**  
**Reflection by Barry Finkelstein**  
**April 13, 2014**

It is good to be with you this morning – and it has been good to be here all weekend. I want to share a secret about this work I do – I love it! I love being a stewardship consultant and helping congregations achieve great things. And there’s nothing that inspires me more than thinking about a capital campaign with one of our UU congregations. The potential energy is palpable, there is a high level of passion, momentum, excitement, common purpose – if also a little anxiety. It is invigorating.

I see capital campaigns as **once-in-a-generation opportunities** to come together as a community and invest in what we so passionately believe in.

I am convinced that we UUs have a **life-affirming, indeed life-saving, message** so crucial for our times. We offer:

- open-mindedness and acceptance in a culture of polarization;
- we offer radical love and hospitality in a culture of fear and cynicism;
- we offer social justice in a culture of consumerism and greed;
- we offer our children and youth empowerment and honesty in a culture of ideology; I could go on and on.

And I heard stories along those lines here at First Parish.

I invite you to **imagine** what is possible for Unitarian Universalism and for First Parish in Chelmsford in the near and distant future. Think for a moment about what might take place here in the next year, next decade, 50 years from now. Think back through your history, all 350 years of it! What were your forebears imagining for this society back when this building was built in 1842? How about those that dug deep and dreamed big and took a leap of faith to build the RE wing in the 1950s. Think about the foundation on which you are building. Isn’t it your time now? Are you ready to take the next step?

You have done much over the past few years on a path toward a building program and capital campaign. You have dreamed big – which is wonderful. You have asked what is possible for this congregation. What might you do with this beautiful facility in this wonderful location? And how might that help you fulfill your mission? How might you re-tool this wonderful building to bring it more in line with your modern values while retaining all the history that’s here? It is these questions that drive my passions and drive my work on stewardship and on capital campaigns.

And while I love doing this work, it is not without its **challenges**. Capital campaigns require us to talk with one another about uncomfortable subjects like money and priorities. They prod us to work to resolve differences in a way that honors each person while reaching decisions – and moving at **just the right speed** – fast enough to sustain momentum and enthusiasm, deliberate



enough to engage everyone and think through the possibilities. This is not easy work, but it is work that strengthens our congregations in addition to getting the campaign done.

So I hope that you will accept these challenges and do this work with passion, joy, and commitment – taking the next steps toward whatever you decide in the end.

I want to be sure that this congregation is here for generations to come – and not just here, but also strong, sustainable, vital – a force to be reckoned with. And I know that you want that too. I leave you with some questions: Is there a better investment in the world’s future that you can make? Are you up for these challenges? I hope you will join me for further conversation after the service.



## Appendix C Next Steps Weekend Survey

1. What are three defining milestones or events in this congregation's history?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

2. Please complete the following sentence by circling one option below: Over the next five years, I would like to see our membership experience the following annual growth rate:

1. no numerical growth.
2. 5 percent annual increase in membership.
3. 10 percent annual increase in membership.
4. 15 percent annual increase in membership.
5. greater than 15% annual increase in membership.

3. What are the three greatest strengths of this congregation?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

4. What are the three most important challenges this congregation needs to address in the next five years?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



**Appendix D**  
**First Parish Chelmsford Unitarian Universalist**  
**Survey Results**  
**Assessment Visit (42 Respondents)**

**1. Milestones**

Response	Number
Calling Reverend Ellen	23
Becoming a Welcoming Congregation	22
Creating a covenant	6
Founding in 1655	5
Hosting Table of Plenty	5
Starting New Orleans and other relief/mission trips, growing in outreach	5
Successful steeple repair	4
Becoming a UU congregation	4
Building the town hall/church in 1842	3
“Great Schism” in 1981	2
Construction of RE wing	2
Split of Town Hall in 1840	2
Starting OWL	2
Governance evolution (Standing Committee/subcommittee structure, Policies and Procedures, etc.)	2
New Minister/Improvement in Ops 1992-1993	
350 <sup>th</sup> Anniversary Celebration	
Change in Joys and Sorrows	
Dishwasher	
Transition to a new DRE	
Fiscal summits	
Paying the RE Director	
Becoming icon/recognized in community	
1970s – same sex commitment ceremonies	
“They” took “our” common	
Staying Unitarian in 18 <sup>th</sup> century	
New organ installation	
Cell towers	
Vietnam War schism	



## 2. Growth Preference (Annual)

Response	Number
5% annual increase	17
10% annual increase	13
15% annual increase	2
Greater than 15% increase	
No Answer	7

## 3. Strengths

Response	Number
People/Welcoming/Open/Loving	32
Minister and Staff	17
People willing to share their time, talent, and treasure; commitment of core leadership	9
Sense of community and generosity of spirit	9
RE Program, Life Long Faith Formation, and DRE	7
Care for Sick/Suffering/In-need, profound empathy, pastoral care	6
Communication: decision by consensus, willingness to converse, listening, drama-free, attitude	5
Commitment to Social Justice and Outreach	5
Spirituality	4
Diversity	3
Music Program and Choirs	3
Balance of Longtime and New Member Input	2
Worship Service	2
Program Traditions/History	2
Diversity of Programming	2
Financial Stability/Debt-free	
Building and Setting	
Enthusiasm and Energy for what we do	



#### 4. Challenges

Response	Number
Facility issues: accessibility/space/safety/flexibility, balancing modern needs and historic building, do we stay at this location	34
Being visible – Spreading the “good word”/outreach, expanding our ministry into the community	10
Parking	9
Managing and sustaining growth, keeping peace as we grow, ensuring funds to support growth, growing RE program	8
Membership: welcoming, engaging, accommodating, and retaining people, retaining young adults and families	8
Continue diversity – generational, economic – engaging children, aging members, separation of cultures (generations)	6
Leadership development: attracting, training, and supporting current and future church leaders	5
Replacing the Music Director	3
Communication with one another as we move forward – listening, maintaining sense of humor, dealing with change	3
Expanding diversity of spiritual service types, lack of diversity	3
Possible change of ministry	2
Governance changes	
Capital campaign	
Data coordination	
Defining our UU-ism	
Slide toward institutionalism	
Rise of secularism and non-traditional spirituality	
Faith formation for all ages	
Developing a mission or vision	
Figuring out how to channel the energy/enthusiasm	



## Appendix E

### Searching for the Future: A Process for Developing a Common Vision

*Searching for the Future* is a weekend program of small group workshops designed to help a congregation clarify its vision and mission, and develop a starter list of goals that can later be incorporated into a strategic plan. It is highly participative, and should include as many members of the congregation as possible. The workshops are lively, making the process of clarifying vision and mission not only painless, but actually fun. The process can be tailored to the specific needs and starting point of each congregation.

Lay leaders willing to help facilitate a workshop meet on Friday evening with the consultant to go through the process of articulating a vision, creating a draft mission statement and brainstorming goals in support of the mission. On Saturday, these leaders and the consultant facilitate several small groups of church members to go through the same process. Late Saturday or Sunday, the facilitators meet again with the consultant for a wrap-up session to blend the draft vision and mission statements into one statement, which is sent to the congregation for adoption. The brainstormed goals generated throughout the weekend are reviewed. The top suggestions are collated and then distributed to a strategic planning committee or the governing body for consideration in the formulation of a five-year strategic plan. The goals portion of the weekend can be focused on the specific needs of each situation – for example, they can be used to support a case statement for a capital campaign.

SFTF is based on Appreciative Inquiry (AI), a method of organizational planning that builds on strengths and successes. While the AI approach does enable an organization to work on issues and challenges, the process emphasizes the positives. Beginning with what is going well enables an organization to do more things well in the future.

The following definitions are used throughout *Searching For the Future*.

- **Vision:** A mental image of the organization in an ideal future state.
- **Mission Statement:** A concise, powerful, and moving description of the ministry of the organization, its reason for being, and its place in the world.
- **Goals:** Identified themes to be undertaken in support of the vision and mission.
- **Activities:** Specific projects, with measurable outcomes that support the vision, mission and goals of the organization.

#### Preparation

##### *Promotion*

Good attendance is essential to give validity to the process and build momentum. To that end, publicity and promotion activities are crucial. Here are some thoughts and examples to consider:

- The lay leaders and professional staff must understand the purpose of the weekend and they must be openly committed to it. They must be willing to share that support with the rest of the organization. The minister(s) are encouraged to attend the Friday session and serve as cheerleaders.



- Begin promoting the weekend two months in advance, or as soon as possible.
- Be clear about the participatory nature of the process.
- Be clear about the time commitment. The facilitators devote three hours on Friday evening, three and a half hours on Saturday (morning or afternoon session), and two and a half hours on Saturday afternoon/evening or Sunday afternoon for a total of nine hours. The participants commit three hours on Saturday.
- Focus on the future. Many people have attended something similar (at least in their minds) that turned into a rehash of past events, particularly perceived failures. They fear that SFTF will turn into just another unsatisfactory experience. Make it clear that while we will acknowledge and build on the history, the focus will be on the future of this organization.
- Use testimonials from other organizations about SFTF.
- Use the newsletter and the Sunday bulletin for announcements. Encourage the leaders to be creative. One organization created a list of the top ten reasons to participate.
- Supplement the announcements with a telephone tree to personalize the invitation.
- Use email lists to invite members of the organization.
- Post a notice about the SFTF on your web site with a link to sign up.
- Ask members of the governing body and other relevant committees to promote SFTF during coffee hours, and have a registration table available.
- Include time for food and fellowship before each session. Morning sessions might offer coffee, juice, and muffins. Soft drinks, crackers, cheese, and fruit can be available at afternoon sessions. If evening sessions are scheduled, soup, finger sandwiches and non-alcoholic beverages can be provided.
- Provide childcare and transportation when needed.
- Equip each session with newsprint, markers, 3x5 note cards, and masking tape (that will not remove paint from the wall).

### ***Facilitators***

- Facilitators are participants during the Friday session, process leaders during the Saturday sessions, and participants in the wrap-up session.
- It is best to have two facilitators for each session, so they can divide the role of moderator and scribe, and support break-out groups.
- Facilitators can be recruited from among acknowledged leaders of the organization who are passionate about the organization. Facilitators should be comfortable leading groups and must have the ability to facilitate without offering visioning suggestions. They are responsible for the process, not the content developed during the session they are leading – they have had their chance to be participants during the Friday session.

### ***Sign-up Process***

Wide-spread participation is a key to success. Extensive publicity helps make the congregation aware of the process. They need to fully understand the process including their willingness to contribute 3 hours of their time. The more that people participate, the greater will be the degree of ownership of the mission statement and the goals that are generated by the weekend process.



Members should be able to call the church office or a designated member to register to attend a particular session. In addition, personal phone calls can be made to members and friends in the two weeks before *Searching for the Future* to clarify which session they wish to attend. These phone calls can also determine whether childcare is needed. These phone calls are likely to dramatically affect the level of participation. At the very least, the phone calls will increase congregational awareness of the process.

Shortly before the weekend, the names of those attending can be sorted into groups of 8-12 participants and assigned to specific facilitators. This process will help to determine how many facilitators will be needed for each time period. Groups work well when they represent the diversity of the congregation (age, gender, belief systems, etc.). It is suggested that family members be separated into different groups and youth be encouraged to participate.

On the Saturday of the *Searching for the Future* weekend, it will be necessary to have an on-site coordinator to welcome the participants and direct them to their rooms. Inevitably, there will be people expected but not showing up, and others showing up unexpectedly, and so there will need to be someone doing last minute changes to the groups.

Keep track of the numbers of those actually attending, so that you can report the numbers to the congregation afterwards.

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