

Date: October 11, 2004
To: **All Members and Friends**
From: Long Range Planning Committee
RE: **Growth and Strategic Planning**

Greetings to All!

This packet likely falls into the Too-Much-Information category, but as UU's are often curious and/or proof-dependent thinkers, we are offering several documents for your reading pleasure. If you are pressed for time and/or uninterested, please just read this 1-page memo, then get on with your life! This letter will attempt to hit the highlights.

Other information in the packet:

- Frequently Asked Questions (FAQ's) and some attempt at answers
- Assessment Report from Growth Consultant Howell Lind, September 2004
- Long Range Planning 2003/2004 Report, August 2004

Okay, so here's the summary.

1. We're growing. A lot. 230 members at last count, one of the highest UU growth rates in the country. Yay!
2. We don't fit well into our building – crowded sanctuary, RE classes, Fellowship Hall, support spaces, etc. Boo.
3. We have been studying the growth issue for three years, and continue to make forward progress. The latest step was hiring UUA Growth Consultant Howell Lind. Yay!
4. Howell confirmed that we are crowded and that if we don't do *something* we will likely stop growing and even shrink. Big boo!
5. Howell also confirmed that we are a healthy congregation, ready to take the steps to accommodate our growth. YAY!

Howell emphasized that growth is not just in numbers. With *all* growth in mind, our congregation will:

- Lift up our **programs** to further meet the needs of this community
- Restructure our **governance** to facilitate communication and participation
- Provide for the **spiritual** growth of our members, and
- Develop **facilities** that will support our congregation's vision

Steps for this year:

- Fall 2004: - Distribute this information packet (check!)
- Develop and prepare for interim solutions, such as 2-services and vanpools
- Winter 2004: - Participate in Cottage Meetings – Potluck gatherings throughout the county to discuss our needs and goals. We're going for 100% participation!
- (Likely) Hire a consultant to prepare a feasibility study for a capital campaign
- Spring 2004: - Based on gathered information, conduct a congregational vote on next step.

It's an exciting year! Thank you for your time!!

Frequently Asked Questions: FAQ's

1. Will we be moving to a new building?

At the end of this year, after a deeper level of research and conversation, the congregation likely will vote on whether or not to move to a new building. Relocation would include a capital campaign, land/building acquisition, design, construction and completion, with lots of variations in the details.

2. Our numbers have grown in “crowded” conditions so far – why would our membership *decrease* if we stay in our current building?

This is a controversial area that is difficult to predict, and is counter-intuitive for most of us. Various UUA/District folks have told us that overly crowded fellowships start to lose members, often by a lot. Reasons seem to relate to the momentum and energy of a congregation, i.e., doing nothing may be sending a message that we don't see ourselves as vital and growing or planning for a strong presence in the future. Concern over a decrease does not necessarily mean that a new building is required, but that *something* should be done through operations (i.e., 2 services), education (i.e., these conditions are an intentional choice), or facilities (i.e., shifting use of space, or relocation).

3. Can we open a satellite in the North and South County?

The UUA reports that a split or spin-off congregation needs 80-100 members to be successful, plus it needs 3-5 years of financial support by the host congregation(s), which would be a debilitating loss for this congregation right now. When UUFSLO congregation reaches 400+ members, a spin-off or satellite would be an appropriate next step.

4. How will we serve the North and South Counties now?

Some programs already exist, such as potluck gatherings, and others need to be developed. Ideas include formal carpooling, especially for non-drivers, adult education classes at locations outside of the fellowship, and affinity groups.

5. Two Services works elsewhere, why can't it work here?

It can work here, and likely will need to work here, at least as an interim solution. Howell noted that 2-services works well in two cases: 1) The congregation loves their building because it is historic, has a great location, or other reason, or 2) It is used as an interim solution while other plans are being developed. Two services will continue to be investigated over the course of this year. We have been advised that it takes about a year to plan and implement 2-services.

6. What is the Long Range Plan, anyway?

Actually, no one has directly asked us this question, but it seems like a good one! It turns out that the Long Range Planning Committee has really been doing Strategic Planning, which is typically a 5-year look-ahead. Howell noted that planning much further than that for a congregation is not very helpful. He did suggest that we formalize the strategic planning process with goals and feedback in all areas of the congregation, but until then we'll keep the LRP name.

- 7. Sometimes I feel I don't know all these new faces – Are we growing too fast?**
Growth can be both exciting and uncomfortable, which is one of the reasons that our congregation will be looking at *all* areas of growth, not just numeric (see the cover letter). During this transition, we will remain open and welcoming to all who seek Unitarian Universalism.
- 8. Can we afford a new building?**
In a word, yes. Based on our numbers, pledges, and past performance, a capital campaign will easily bring in \$1 million, and perhaps quite a bit more. We likely will hire a consultant to prepare a capital campaign feasibility study and develop the dollar goals and details of the campaign itself. With the capital campaign, sale of our Foothill Building, possible grants, and a mortgage, we will be able to afford a larger building on more land.
- 9. Bigger is not necessarily better – How can we justify the environmental impact of building?**
Agreed. We need to stay vigilant of our congregation's larger goals. As we continue to make Unitarian Universalism available for those who seek this as a spiritual home, we will need to avoid getting caught up in consumerism and a bigger-is-better attitude. Whatever our solution, we will attempt sustainability wherever possible.
- 10. What if we find a wonderful building/piece of land NOW?**
An important part of relocation is the *process*, so that we have a shared vision as a congregation and are proceeding *together*. The anticipated sequence might be a year to plan (this year), one or two years for capital campaign and programming, 1 year for land acquisition and design, and two to three years for approvals and construction. It can go faster, or slower, depending on many factors, but land and/or building acquisition could be few years out. Of course, an amazing opportunity would not be tossed out for not fitting into the sequence! LRP continues to keep an eye out, so if you get a lead on a great deal (or have a chunk of land to donate!), let us know.