



# **Five Year Comprehensive Plan 2006-2011**

**Unitarian Universalist Area Church at  
First Parish in Sherborn**



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# Section 1: The Comprehensive Plan

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## **In this Section:**

- [\*“Mission, Vision and, Core Values” on page 5\*](#)
- [\*“Executive Summary” on page 7\*](#)
- [\*“Action Items for the Comprehensive Plan” on page 11\*](#)
- [\*“Reports from the Sub-Groups” on page 13\*](#)
- [\*“Financial Ambitions” on page 19\*](#)



# Chapter 1: Mission, Vision and, Core Values

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We, the Comprehensive Planning Task Force for the Unitarian Universalist Area Church (UUAC) at First Parish in Sherborn, begin our Comprehensive Planning report with the new statements of mission, vision, and core values that grew out of the November 2004 workshop, *Searching for the Future*.

Comprehensive planning task force: Pat Manely, Loretta Lee, Barbara Allen, Lynne Swenson, Roger Demler, Mary Ansell, Dot Widmayer, Eleanor Webster, Deb Boyce.

## Mission

We are a caring community dedicated to spiritual exploration through reflection, education, action and service.

## Vision

The UUAC has a vision of growth in numbers and in connectedness and in commitment. We anticipate growth in attendance, in membership, in our support for individual learning and the spiritual enrichment of members young and old, in our active contributions to our own church, and to the various communities to which we belong.

## Core Values

- We affirm and promote ethical values guided by love.
- We respect the worth and dignity of all.
- We promote peace, liberty and justice for all.
- We believe in the democratic process.
- We believe in the right of conscience.
- We respect the interdependent web of life.
- We welcome people who share our values into our community.



## Chapter 2: Executive Summary

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### Beginnings

In the spring of 2003, as the church prepared to welcome a new Minister, the congregation was excited about the changes and potential for growth that many expected to result. There was a call for organizing a Capital Campaign to renovate the sanctuary, expand access, and upgrade our facilities. Congregational leaders contacted the Unitarian Universalist Association for help in conducting a campaign, and were urged to develop a *Comprehensive Plan* prior to embarking on raising funds.

In the fall of 2003, Rev. Patricia Newport Hart, a UUA Fundraising Consultant, assessed our readiness to proceed, and recommended waiting some months before beginning the task. (See Appendix A, [“Initial Assessment Report” on page 23](#)). A Comprehensive Planning Task Force was formed and it began the process of planning for our future in the summer of 2004. This Comprehensive Plan is the result of all that followed.

### Searching for the Future

In November, 2004 many congregants participated in “Searching for the Future” workshops, lead by Rev. Patricia Hart. Participants began the process of creating a vision of the future and a new mission statement. Five key issues (Membership, Congregational Growth, Children and Youth Programming, Social Action, and Programs for Adults) were identified for exploration by the Comprehensive Planning Task Force. Each issue became the focus of a subgroup charged with assessing our needs and proposing avenues of action. In addition, there was a call for clear, transparent and sound finances. To gain a better sense of specific areas of interest, the Task Force surveyed the congregation in February 2005. Survey questions may be found in Appendix B, [“Comprehensive Planning Survey” on page 31](#).

In “Searching for the Future,” participants also identified areas we found vibrant and which didn’t require major change, among them Sunday worship, the person of our Minister, our rich and diverse music program.

Sunday morning worship will continue as a focal point of our communal experience as a congregation, but it will also increasingly become a doorway to other forms of spiritual, educational, social, and volunteer activity.

### Membership

Membership is vital to the success of the congregation. Empowering all members, through programs that offer opportunities for reflection, education, action and service is key. Recognizing this early, the Comprehensive Planning Task Force encouraged changes in our membership process and the hiring of a Membership Development Coordinator (for a description of the duties of this position, see [“Membership Development Coordinator” on page 41](#) )

## Congregational Growth

The Growth sub-group met during the winter of 2005 and determined that the congregation anticipates growth in attendance, in membership, in support for our individual learning and the spiritual enrichment of members young and old, in active contributions to our church, and to the various communities to which we belong.

## Children and Youth Programming

We will make a positive difference in the lives of children and youth by providing quality religious education programming, with a focus on UU beliefs, principles, spirituality, and moral grounding. In order for our young people to understand more fully, care for and participate in the larger world around them, there will be community service and social action opportunities, as well as programs designed to promote a sense of community within both the Children and Youth Programming “family” and the church as a whole.

## Social Action

Existing Social Action programs at UUAC provide direct support to those in need. The poor, the hungry and the homeless have received our donations through a variety of outreach programs. Quilt-a-thons have provided the comfort of a quilt to victims of cancer and domestic violence. Education programs have helped us learn more about Gay, Lesbian, Bisexual and Transgender (GLBT) concerns and about homelessness. These programs should continue. Our goal is to provide meaningful and diverse activities which stimulate wider participation by the congregation in serving the cause of social justice. We will offer a workshop or educational program about the different facets of Social Action and how to develop them in a congregation.

## Adult Programs

A need for programs for adults that generate spiritual exploration, a feeling of community and a sharing of core values will be ever present. We propose to continue to develop the range of opportunities for people to enter our doors and from there to be enriched and to contribute back to the life of our congregation and to the world outside our meetinghouse.

## Finance

We projected our resources and expenses on a conservative membership increase of one-half by June 2011 and expect a steady increase in discretionary funds for new initiatives and preservation of our facilities. Restoration of the sanctuary is now planned to begin this year (2005-2006) using higher than expected income from the recently consolidated Endowment and Trusts. The Comprehensive Planning Task Force is calling for a capital campaign to finance the purchase of the house next door, a major addition to the church building, or both.

A steady annual investment in a new facilities reserve account will now provide for major planned and unexpected facilities projects to minimize the need for large financial campaigns. The accounting system will be improved to present all of our income, expenses, reserves, and assets in a uniform consolidated format so that the Congregation can better direct our ambitions. See Appendix I, ["Facilities Reserve Fund Budget" on page 59](#), for more information.



## Chapter 3: Action Items for the Comprehensive Plan

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The Comprehensive Planning Task Force urges action by the UUAC Board of Directors on the following:

1. Form a task force to define space requirements of the congregation and then to recommend the best way to accommodate those needs. This task force must work with a consulting architect to accomplish this assessment.
2. Appoint a Governance Task Force to study and recommend a governance structure that will function for our congregation into the future. We recommend that changes to our governance structure be a top priority for 2006-2007, that this task force make recommendations to the Board of Directors by December 31, 2006.
3. Transform our current "Nominating Committee" into a "Lay Leadership Development Committee." The CPTF recommends that this committee consist of five members, three elected by the congregation, two appointed by the Executive Committee. (To effect this transition will require a change in the by-laws). This transformed committee's purpose is to facilitate the identification and training of congregation members for leadership roles as outlined in Appendix E, "[Lay Leadership Development](#)" on page 43. Local training should be a priority for 2006-7.
4. Support the projects proposed by the Children and Youth Planning Task Force, allowing them to determine the best areas to pursue in response to the urgency of their needs.
5. Encourage the Interfaith Hospitality Network group to focus on coordinating activities and establishing a process for set up and staffing needed to welcome and host families who will stay overnight in our church.
6. Assist the Social Action Committee:
  - In its efforts to educate congregants about existing Social Action programs,
  - To identify a team to develop and strengthen a diverse yet practical Social Action agenda.
  - To provide ways for congregants to participate in Social Justice initiatives available through the Mass Bay District and other the Unitarian Universalist venues.
7. Urge the Adult Program Committee to:
  - Envision themselves as responsible for building community by offering programs that bring members and friends together.
  - Make the process of bringing programs into existence easy and transparent.
  - Work to attain some degree of financial self-sufficiency.
8. Support a Capital Campaign.



## Chapter 4: Reports from the Sub-Groups

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This chapter includes reports from the following sub-groups:

- [\*“Congregational Growth” on page 13\*](#)
- [\*“Children and Youth Programming” on page 15\*](#)
- [\*“Social Action” on page 16\*](#)
- [\*“Adult Programs” on page 17\*](#)

### Congregational Growth

From the outset, members of the Comprehensive Planning Task Force knew that growth in attendance, in membership, and in support for one another would be intrinsic to the plan. As an area church, we recognized that people who need to hear and be part of our message live in many towns, most abutting Sherborn.

After the “Searching for the Future” weekend, it became apparent to the Task Force that membership development was a key issue, and that we could not wait until plan completion to begin to address the membership related issues.

A Growth sub-group [Task Force] was formed to study growth indicators and trends, and to make recommendations to facilitate growth. The table of indicators, trends, and projections is in Appendix C, [\*“Growth Indicators” on page 39\*](#). Appendix J, [\*“Attendance Data” on page 65\*](#) includes graphs that summarize attendance data from the 2003-2004 church year to the 2005-2006 church year.

To be a vibrant, and growing community, with a diverse membership, we needed to create a culture of welcoming, where visitors feel as if this church is a place they want to return to, and in returning feel valued, heard, and as if they belonged. The path to membership is one that is often sought by returning visitors. The process of joining must be both enjoyable and straightforward. Existing members must also feel supported and nourished in their personal spiritual journeys.

Receipt of a grant during the spring of 2005 made it possible to hire a Membership Development Coordinator who has successfully implemented suggestions made to the CPTF and to the standing Membership Committee. The process now in place is perhaps most succinctly described by the job description of the Membership Development Coordinator which is found in Appendix D, [\*“Membership Development Coordinator” on page 41\*](#).

Three other issues needing serious and creative thought emerged:

- [\*“Space Requirements” on page 14\*](#)
- [\*“Congregational Governance” on page 14\*](#)
- [\*“Lay Leadership” on page 14\*](#)

Having adequate space for children, youth, and adult programs, for the choir, for meetings and offices for personnel is essential and planning must begin immediately. We already are exceeding available space within our meetinghouse. These issues will be addressed outside this report in anticipation and discussion of the capital campaign.

To be able to have more members play leadership roles we need to have functional systems for developing lay leaders, for communicating across the community, for volunteer management, and for showing our appreciation to volunteers.

It has become essential to re-examine our method of governance as our membership grows. Our current method works best for congregations of fewer than 100 members.

## Space Requirements

The challenge of space requirements is referred to often in this report. These needs should be specifically addressed by a committee working with a consulting architect, first to define the requirements of the congregation and then to recommend the best way to accommodate those needs.

## Congregational Governance

All Unitarian Universalist churches are self-governing. We make our own decisions, hire our own minister, and control our own budget. Each year, we have a congregational meeting to approve a budget and elect Congregational Officers, who govern the Church.

There are many styles of governance appropriate to churches, based in large part on church size (number of active participants). In the structure prescribed in our bylaws, "all authority rests in the membership and is exercised through meetings of the membership, except" as delegated. This structure, a "Committee of the Whole", is generally effective in family sized (40-60 active participants) churches. With active participation at 150, it is less effective and it is time to examine governance.

## Lay Leadership

In his book "Healthy Congregations," Peter Steinke writes "Congregational leaders are the key stewards of the congregation." and "The mood and tone of leadership is significant because morale flows down."

At UUAC, we want to provide opportunities for members to develop into leaders who understand what it means to be stewards and set the mood and tone that is vital for us to be a healthy, growing congregation. The approach to developing leaders must be multifaceted, with local (UUAC), regional, and national options.

We recommend that our current "Nominating Committee" be transformed into a "Lay Leadership Development Committee."

This transformed committee's purpose is to facilitate the training of congregation members for leadership roles, encouraging them to utilize existing local, regional and national Unitarian Universalist resources and other appropriate ones as well. Such resources include, but are not limited to Mass Bay District Learning Congregations programs, North East Leadership School, Ferry Beach Conferences, Star Island Conferences, and UU University (a UUA General Assembly Program for Congregational Officers). When appropriate, the UUAC should plan to provide some scholarship aid.

Peter Steinke, *Healthy Congregations: a systems approach*. Bethesda: The Alban Institute, Inc, 1996, pp 25-26.

Details of our proposals on Lay Leadership can be found in Appendix E, [“Lay Leadership Development” on page 43](#).

## Children and Youth Programming

Programs for children and youth should encourage a sense of community through intergenerational experiences and the integration of children and youth into the greater church community, with a focus on spirituality and our UU principles and identity. Further, we as a congregation want to give our children a home that will always welcome them and that will nurture their individual growth as well as their development as responsible and caring world citizens.

Toward these ends, Children and Youth Programming will provide:

- **Quality religious education programming/curricula** – Offer programming and enrichment experiences that inculcate the seven UU principles into the lives of our children; that encourage their individual and unique spiritual growth (i.e., the spirit of love or truth, the holy, the divine or the gracious); that inspire confidence and a feeling of self-worth, along with compassion and tolerance for all; that enlighten them not only regarding world religions, but also Judeo-Christian teachings.
- **Social action and community service** - Provide a meaningful program of social action and community service projects that allow our children to understand more fully, care for, and participate in the larger world around them.
- **Sense of community among children, youth, families** - Encourage a safe, supportive, warm “home” for children and youth that will always welcome them and that will nurture their individual growth as well as their development as responsible and caring world citizens.
- **Connection to larger UUAC community** - Integrate Children and Youth Programming into the larger UUAC community, for the benefit of all.
- **Maintenance of strong Children and Youth Programming leadership** - Encourage and support growth of Director of Religious Education (DRE) and lay Children and Youth Programming leadership.
- **Adequate Children and Youth Programming space, staffing, training, support** - Ensure that space, staffing and training opportunities are adequate to provide a meaningful and effective religious education program of the highest quality; generally support Children and Youth Programming volunteer teachers. Appendix J, [“Attendance Data” on page 65](#) includes graphs that summarize attendance data from the 2003-2004 church year to the 2005-2006 church year.

See Appendix F, [“Children and Youth Programming” on page 47](#) for more information on this proposal.

## Social Action

The Social Action sub-group developed the following strategy for Social Action for the future at the UUAC.

### Commitment to the Interfaith Hospitality Network

Investigate, Promote, and Implement UUAC Commitment to the Interfaith Hospitality Network(IHN):

- IHN provides food and shelter for families in transition from homelessness to domestic security. A team of interested individuals analyzed and assessed the viability of UUAC participation in IHN and brought findings to the congregation which then voted to participate in IHN.
- The church is committed to providing a safe place for families to sleep, to have a nutritious breakfast and dinner, and to find in our church a safe and nurturing environment in the evenings. Primary focus in near future is coordinating activities and establishing a process for set up and staffing needed to welcome and host families who will stay overnight in the church for one week.
- Long term goals will be to develop this on-going program so that it becomes self managing and self sustaining. This will require widespread participation by many church members and is especially suited to participation by families.

### Education about Existing Social Action Programs

Educate members about existing Social Action programs:

- Provide more and better information about the goals and benefits of each program including information about what to expect and/or how to do it.
- Provide information about how each activity supports our Mission and Vision.
- Relate each activity to our UU Principles.

### Identification of a Social Action Team

Identify a team to develop and strengthen a diverse yet practical Social Action committee and educate members about the potential for Social Justice initiatives at UUAC.

- Program for UUAC in the future focusing on Social Justice issues.
- Develop/Refine plan for funding programs & activities.

Results of the congregational survey regarding social action are summarized in appendix G, [“Social Action Survey Summary” on page 55](#).

# Adult Programs

Adult Programs is envisioned as the group that provides many of the opportunities to build community by offering programs that bring both new and old congregants together. These programs allow our members to come together in situations that provide opportunities to socialize but also to become known and know others at a deeper level than at other places they may go. This allows people to become more comfortable here and to want to spend more time here and to contribute their talents and time.

The Adult Programs Task Force began by reviewing the ad hoc nature of how programs at the church have begun and what made a successful program. We found that the successful programs all met several basic needs of the congregation. We then reviewed all the data we had on what the basic needs of the congregation were, and identified these four areas:

1. Spiritual Growth
2. Ways To Sustain Spiritual Growth
3. Forums for Open Exchange of Ideas
4. Opportunities to Socialize, Communicate and Bond

All of the Adult Programs that have been successful in the past fall into one of these categories and our job was to propose both new programs and a committee structure that would allow new programs to readily get started and receive ongoing support.

The Adult Program Planning committee developed ideas for new programs for the section on Adult Programs in the Comprehensive Planning Questionnaire. Our goals were to a) test interest in attending new programs in the areas listed above, b) find people interested in planning and running these programs and garner any additional ideas relative to Adult Programs

The results showed that on average 54% of the 50 people who responded to the questionnaire were interested in the type of programs described. The highest interest (64%) was in programs centered on Spiritual growth. In addition 46% of those who responded expressed a willingness to help lead or organize the programs suggested. These results suggest that many of our congregants are interested in new programs and would be willing to help start them.

Summarized below are the types of programs we now have and those we see in the future at the UUAC:

Type of Program	Current Programs	New Programs
Creating a Spiritual Home	Small Group Ministry Roots Spiritual Autobiography	Expand SGM UUA Curricula Bible Study Cakes for the Queen of Heaven
Personal Development	Book Club Men’s Group Drumming Quilting Yoga	Poetry Reading Craft Lessons  Provide Programs to Help People Find Their Personal Calling to Help Develop the Church.

Open Exchange of Ideas		Speaker Forums on Topics of Interest, Political Debates Discussion Groups on Current Topics (e.g. Gender Dynamics)
Provide Opportunities to Socialize, Communicate and Bond	Pot Luck Dinners are currently organized by the Hospitality Committee.	Curious Travelers (doing exciting activities around the area) Movie Group, Food and Wine Tasting

We next turned to issues of how to organize the Adult Programs Committee to be successful. The issues we addressed included: defining the roles of the chairperson and members of the Adult Programs Committee, breaking the committee's work into manageable size pieces, finding ways and incentives to create new programs without causing complications in the church calendar, defining the cost structure of programs offered, as well as creating a way to offer scholarships so that no one would have to forgo attendance for financial reasons.

We have defined the role of the Adult Programs Chairperson as: being responsible for managing the calendar of programs so as not to conflict with other church events, assuring a diversity each year to meet the needs identified, setting the cost and fees of the programs, administering a process that allows up to 10% of the participants to attend on scholarship, and evaluating the success of each program offered.

To break the committee's work into manageable pieces we proposed that each committee member be responsible for conducting at least one program per year in their specific Vision area. This includes managing publicity, gathering attendance, and giving or finding someone to give the program.

We have submitted a budget to the Finance Committee reflective of this ambitious but realizable program. The Adult Programs committee should strive to be as self funding as possible and we recommend that Adult Programs strive towards this as a goal.

We expect to offer at least three new programs this year (2005-2006) utilizing Committee members that have been selected from our task force. In the 2006-2007 church year, we propose offering new programs in all four areas. We are hopeful that over time appropriate programs will also be offered in the summer to help the congregation connect during this period.

## Chapter 5: Financial Ambitions

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**What we support:** Our survey of the Congregation's financial ambitions concluded that we have a balanced view of our obligations and that we wish to take greater responsibility for the operating cost of our Church. The results of the survey are included later in the chapter (see ["Financial Ambitions Survey Results" on page 20](#)). Optimism is rampant.

**Where we are:** We anticipate that we will have nearly \$25,000 of operating surplus this year (2005-2006), ending in June 2006. Good performance from the consolidated Trusts and the Endowment, great annual auction returns, ever increasing antenna lease income, and continued high growth in pledge income have expanded our income. We have invested more in our staff, and invested \$18,000 in major facilities work, while keeping our operating expenses on budget. \$9,000 of the surplus, nominally from the antenna income, is to be given to the Endowment.

**How we will grow:** Our income is highly dependent on our membership. Our current 200 members, through pledges and the auction, contribute 58% of our total income, and cover 88% of our personnel budget. We project that our membership and member-donated funds will grow at least 10% per year over the next five years, to July 2011. Between the 2003-2004 budget and the 2005-2006 budget, our pledge base has increased an average of 22%. This will increase our membership to nearly 300 and our pledge income by 50% in the 5<sup>th</sup> year. This growth will allow the members to fund our entire personnel budget.

**How we will keep the lights on:** The non-staff expenses will grow with inflation, while the non-pledge income (Endowment, antenna) will grow faster than that. This will cover a proposed new line in the budget of \$18,000 for a revolving Facilities Reserve Fund that is designed to cover all major maintenance items over the centuries (see Appendix I, ["Facilities Reserve Fund Budget" on page 59](#) for more information).

**What we will have to invest in our staff:** The budget forecasts show an increasing operating surplus over today's costs; that is, with the current personnel budget. The non-staff expense increases will be covered by the Endowment and antennas. The net annual funds projected to be available for investment in staff, new projects, or return to the Endowment is expected to increase from this year's (2005-2006) \$25,000 over a five-year projection. See Appendix I, ["Facilities Reserve Fund Budget" on page 59](#) for more information,

While this may seem comfortable, *realize that this would cover but a 10% annual growth in the personnel budget.*

The size of our membership directly determines the increase in investment possible in our staff. We see a combination of merit increases, more hours by part time staff, added part time specialists, and training of both our staff and our members as the best investment of most of these funds. Some of these staff needs are outlined in sections covering the consequences of growth, expansion of the religious education program, and assistance for our membership.

## Financial Ambitions Survey Results

Here is a qualitative summary of your survey questions on the financial ambitions for our church . There were five topics covering 1) desired pledge income, 2) your pledge level, 3) paying for our facilities, 4) how to invest the cell lease income, and 5) what would you dream to do with a significant surplus.

1. How much of our operating budget should we pay for with our pledges?

Most of you want us pay our own way and not rely so much on outside income, such as, the antenna leases and the endowment.

The increase in pledge income desired by most people appears to be achievable in the near future.

2. How is your own pledge commitment going to change?

A few people commented on fixed or reducing incomes. There was some feeling that there has been too much pressure on pledge amounts. A significant number of people will continue to increase their pledges. We can expect a modest average pledge increase from current members

3. How do we fund our church facilities?

We have a universal appreciation of our historic building and its value in our ministry. We want the building budget incorporated into the operating budget so that all expenses and investments are considered together. Setting aside some antenna funds was a common suggestion. Capital fund raising was suggested as a way to do major projects. A facilities reserve account was also suggested.

4. How should we invest the cell phone antenna income?

There was strong sentiment that much of the antenna money should be saved. Many were concerned about the longevity of the income. Investing part of this in the building is a good use. Investing some in the Endowment strongly encouraged.

5. How would you invest any extra money?

Most of us want to increase our space: add to the church building or buy the building at 5 Washington Street.

## Summary

We will support our church and have a balanced view of our financial obligations and ambitions. We want to see the whole picture in our budget deliberations. We are prepared to invest in our Endowment and expanded facilities.

## Section 2: Appendixes

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### In this Section:

- [\*“Initial Assessment Report” on page 23\*](#)
- [\*“Comprehensive Planning Survey” on page 31\*](#)
- [\*“Growth Indicators” on page 39\*](#)
- [\*“Membership Development Coordinator” on page 41\*](#)
- [\*“Lay Leadership Development” on page 43\*](#)
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- [\*“Social Action Survey Summary” on page 55\*](#)
- [\*“Adult Programs Committee Structure” on page 57\*](#)
- [\*“Facilities Reserve Fund Budget” on page 59\*](#)
- [\*“Attendance Data” on page 65\*](#)



# Appendix A: Initial Assessment Report

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**Note:** This report was submitted by the Reverend Patricia Hart after her assessment visit on November 7th and 8th, 2003. We at First Parish in Sherborn received the report in December, 2003.

## Summary Data

**Name of Congregation:** Unitarian Universalist Area Church at First Parish in Sherborn

**Minister:** The Rev. Nathan Detering

**Contact Person:** Patricia Manley, President, Board of Directors

**Number of Members:** approximately 160 **Number of Pledge Units:** 109

**Annual Budget:** \$248,638

**Annual Pledge Income (approximate):** \$113,000

**Average Pledge (FY2004):** \$1036 **Median Pledge:** \$600

**Approximate average Sunday attendance:** 75-85 adults; 30-40 children

**Mortgage:** none

**Amount of Reserve Funds:** One of the significant issues facing the church is the existence of several major trusts, established at different times, by different groups, for differing purposes – stemming in part from the Sherborn church's consolidation with the Natick congregation several decades ago. Though the UUAC is fortunate to benefit from the caution and foresight of previous generations, it is also challenged to manage the trusts' multiple areas of authority, as well as to manage and administer several funds. (Staffing the trustee positions alone requires the involvement of at least 18 members of the congregation.) This complex structure also inhibits the leadership's ability to clearly explain the church's financial status to congregation members, and possibly depresses levels of giving.

**Endowment** (approximate value): \$70,000 in general endowment; \$41,000 in restricted funds. Successful efforts have been made in recent years to develop planned gifts within the congregation.

**Does the congregation conduct a face-to-face Every Member Canvass?** Yes – this past year's stewardship campaign was well organized, and supported by excellent materials. The result was an impressive increase of more than 40% over the previous year. On the other hand, canvass remains a time- and labor-intensive effort managed by only a few people; there is a need to develop effective institutionalized mechanisms for repeating last year's success in the future.

**Date and Purpose of last Capital Campaign:** The last formal capital fund drive was conducted in 1997-99, to raise money for renovations to the organ, install an elevator, and supplement endowment funds. There have also been other, informal fund drives in the last few years, including a successful effort to create a fund to assist the minister in purchasing a home in the area.

**Does the congregation have current Vision and Mission Statement and Long Range Plan?** The current Statement of Purpose, which features prominently in church reports and materials, was developed and adopted by the congregation in 1995. There is no long-range plan in place.

**Describe proposed project and estimated costs:** No specific project has been identified at this point. Rather, there are a number of urgent maintenance issues that have long been deferred, and a wish to renovate the sanctuary in the near future. In addition, there is a pressing need to develop a congregational consensus about best uses for the nearly \$80,000 in annual income from three current cellular antenna contracts. The leadership is interested in designing a comprehensive planning process, that can engage the congregation in these important choices for the future, and move the church to a more stable financial position.

**What steps have been taken to prepare for this project, and to involve the congregation?** In the last few years, most of the congregation's energy has been focused on ministerial transitions: first the departure of the former settled minister, then a busy and productive interim ministry, and, as of this fall the arrival of the new settled minister, the Rev. Nathan Detering. The search period provided a sense of urgency around a number of building issues, and several major renovation projects were successfully completed; some of this work was made possible by both the income and construction from the cell phone installations. Though there appears to be a growing recognition that the church's financial situation could benefit from both reorganization and increased fund-raising, there are as yet no clear plans in place to accomplish these goals.

**Did you meet with the minister?** Yes; I had both an initial telephone conversation with Rev. Detering, and we met for a brief lunch on Saturday during the visit.

**What action will be taken? When is a campaign likely to take place?** There is no specific plan or timetable for a capital campaign. Our discussion (and this report) focuses primarily on developing a comprehensive planning process that will fit well with the congregation's other priorities in the coming months.

## Visit Overview

An Assessment Visit to UUAC was held on November 7 & 8, 2003. An initial inquiry about capital fund-raising consultations was made to Wayne Clark, Director of UUA Congregational Fundraising Services. Once the referral was made to this consultant, I attended one brief planning meeting with several members of the Board last summer, during which both comprehensive planning and capital fund-raising processes were discussed. Specific arrangements for the assessment visit were made with Pat Manley, on behalf of the Board of Directors. Before the visit, I received a variety of materials to review, including recent Annual Reports and the congregation's ministerial search packet.

The purpose of this Assessment Visit was to gather information about the congregation's resources, current needs, and future plans, with particular reference to financial concerns and opportunities. **This report summarizes the findings of that assessment, identifies major issues, resources, and challenges, and recommends next steps the congregation and its leadership might undertake.**

My presence as a consultant was well received by congregational governance groups and professional staff; and also by representatives of working committees of the congregation. On Friday evening, I met with the Board to gather a sense of expectations for the visit; beginning early Saturday morning I met with interested members of several leadership groups (Finance, Building & Grounds, Social Action, Membership, and Religious Education Committees, and the Sherborn Trust).

Over the course of the two days, I met with 26 congregation members and staff. Twenty-three people also completed a brief questionnaire about milestone events and current issues at UUAC. It is perhaps interesting to note that the largest percentages of those completing the questionnaire have been affiliated with UUAC for fewer than six years, or more than 20 years. A much smaller percentage joined the church between five and 20 years ago. It may be helpful to consider whether these results correspond accurately to the actual membership as a whole.

## Areas of Focus

Drawing on conversations throughout the day, written comments from the questionnaires, reports and other materials, several areas stand out as most important across a range of interests and length of involvement.

When asked about significant milestones in the life of the congregation, four areas were mentioned most frequently: **ministerial transitions, membership & programs** (including religious education), **building improvements**, and **recent financial advances**, (most notably the welcome income from leasing space for cell phone antennas in the steeple). The ministry of the Rev. Dean Starr, the departure of the Rev. Rosemarie Smurzynski, and the Rev. Deborah Pope-Lance's interim leadership were all listed as milestones by several people; but the majority of respondents cited the arrival of the Rev. Nathan Detering as most significant. Many people mentioned the importance of recent renovation projects – especially Unity Hall, and the work that made it possible to relocate ECDC to the upper level and pull together the RE classrooms on the middle floor. The additional income from the cell antenna contracts was listed by several participants, as were recent successes in fundraising for both one-time needs and the annual canvass. Several others were grateful for a renewed “sense of community,” for a revamped RE program and greater involvement of families, and for a generally positive attitude toward the future.

Almost all of the questionnaire respondents answered the question: “Does this congregation want to grow, in size?” in the affirmative, at least to some extent. Several people did express concerns about growth: that a minority seem uncomfortable with it, that a sense of intimacy might be lost in a larger congregation, or that few members seem willing to put in the effort to make it happen. Two people were unsure about whether the congregation wants to grow in numbers, and one felt that focusing on the church's mission was more important. Specific target goals for congregation size ranged from 200 – 400, with the greatest number in the range of 200-250 adult members.

The list of important issues to be addressed was also dominated by the gifts and challenges of growing a congregation. Five areas received repeated mention, with little significant distinction made between short-term (2-year) and long-term (10-year) projects:

## Adding New Members, and Integrating Old and New People Into the Life (and Work) of the Church

Creating new programs, building community, intergenerational options -- “reasons for people to want to come.” Also, the need to improve communication, solve problems effectively, develop opportunities for new leaders to emerge, and retain members; building enthusiasm and avoiding “burnout.”

## Church Finances

Straighten out the “tangled legal and financial issues” related to the church’s five trusts: consolidate trust assets, and/or retain more professional investment management. Fund-raising should be improved across the board, including the endowment, but especially in the area of annual pledging: to increase the number of contributors and the average & median pledge, and to more evenly spread the burden across the congregation. There is a general concern that the congregation needs to reduce its dependence on the cell antenna income.

## Building/Facilities Renovation and Maintenance

The only specific issue mentioned was parking; but several people see a need to reduce conflict about building needs, and funding -- “We need to fix the building so we can stop focusing on it.”

## Religious Education

Creating more classroom space, expanding programs for children, youth and adults, and hiring a permanent DRE.

## Planning for the Future

Crafting a clear identity as a strong, connected, and active religious/spiritual community: a vision for the church’s future. Several people mentioned the need for a comprehensive plan that everyone can agree to, and clear goals and strategies for achieving it.

## Congregational Strengths and Resources

From my perspective, UUAC has several areas of significant strength:

- A sense of **excitement about the future**: A new minister; comfortable gathering spaces; increased (and increasing!) numbers of people attending Sunday worship, several of whom are deciding to become members of the congregation -- all of these contribute to an atmosphere of optimism and possibility. While there are concerns about money, and uncertainty about specific plans for the future, there appears to be little doubt that the church has been moving in positive directions, and now has the potential to become a stronger congregation than it has been in recent memory.
- **Growth**: Growth appears to be accelerating in several significant areas: membership, financial support, attendance (both adults and children), and visitors, to name a few. Greater numbers create additional challenges, and the helpful need to create organizational structures to better serve a growing congregation.
- **Dedicated and talented professional staff**: Rev. Detering has quickly established a strong spiritual and pastoral presence in his ministry at UUAC. The combination of his skills, a growing music program, and the much appreciated

strengths of Carol Greve as interim Religious Education Director, provide an important foundation of services to a congregation that includes both new and long-time members.

- **Financial opportunities:** Though the overall financial picture is not yet where many leaders would like to see it, there are a number of encouraging developments in this area. Pledging levels have increased dramatically – and with continued work to simplify and more effectively manage the various sources of funds, those numbers should continue to improve as well. There seems to be a real willingness to engage the complex legal and financial issues created by the trusts, perhaps for the first time. And though negotiating the difficult decisions about allocating the cell antenna income will not be easy, that additional income may well provide the church an opportunity to move more quickly to a stable financial footing, for the long-term. The lack of any current long-term debt is also a clear advantage in planning for any future major projects.
- **Inviting and accessible program spaces:** Recent renovations and additions have added a great deal to the building’s appearance and usability. It is important to remember that major maintenance projects remain, and that religious education space is limited. Nevertheless the church can now offer its members, friends and visitors inviting spaces in which to gather, learn, work, celebrate and socialize.
- **Good opportunities for lay leadership:** As in many congregations that have weathered major challenges, there is concern about the relatively small core of lay leaders “burning out.” It will be important to intentionally reach out to newer members and invite them to move into leadership; and the best way to do that is to ensure that the congregation’s committees are well-organized, effective, and led by competent lay leaders. Several committees already fit that description, and seem energized to meet the challenges ahead -- including Finance, Religious Education, and perhaps others. Such effective committees can serve as models for other groups within the church, and provide inviting opportunities for new members to become involved.

## Challenges

There are also several challenges that the congregation will need to manage in order to realize its potential:

- **The need for a clear sense of direction:** Given how much has changed, and how many new people have arrived in the last few years, it isn’t surprising that there are some large questions that need to be addressed before specific plans are made. What programming initiatives would best serve the interests of the current congregation? What building concerns deserve top priority – both renovation and maintenance, and best use of space? How big should the congregation grow to be, and what will need to change to serve that larger congregation? And what are the financial implications of any of these choices? It will be essential to engage the congregation in a comprehensive (and time-limited) process to talk about all of these questions, and then to do an excellent job of communicating the results so that a consensus can emerge.
- **Exhaustion:** A consistent theme throughout my meetings was that too few people have been trying to manage too many large initiatives, which results both in exhaustion, and an instinctive resistance to saying “yes” to anything new. There is also concern that the congregation has been saturated by urgent requests for money; there is no apparent widespread interest in beginning new projects.

- **Institutionalizing the work:** In at least a few areas, informal systems are managed by just one or more hard-working volunteers. Formalizing some institutional processes, (for example, welcoming and integrating new members), would be helpful for both leaders and non-leaders, since it would then be easier for people to get involved and find answers to their questions, and would eliminate the need to handle issues one by one.
- **Sorting out the Trusts:** There is an urgent need to clarify the relationship among the trusts, and explain everything so that the congregation both understands the history, and supports whatever changes are proposed.
- **Building confidence:** Recent successes have been accompanied by an increase in confidence that UUAC can accomplish what it sets out to do. In order for such confidence to become a resource the staff and leadership can draw upon, this trend will need to continue. A number of things can help in this regard, including a focus on working openly with the whole congregation, to keep them informed, and to encourage involvement across a wide spectrum of interests and talents.

## Recommendations for Next Steps

Given these observations, and with the overall goal of working toward a shared vision and a comprehensive plan to make it happen, my recommendations are focused in four interrelated areas:

1. Work toward developing a congregational vision: a clear sense of identity and goals, and the plan to implement them. My suggestion is to organize a comprehensive planning process by which UUAC can make the best decisions about its future. A comprehensive plan would address all areas of congregational life, including programs, staffing, outreach, and facilities – and would include specific financial projections for all areas.

Two initial steps could be taken toward that end this year:

- The formation of a Comprehensive Plan Committee, which could begin to map out its process, and clarify its charge.
- A facilitated program to engage the congregation's interest – possibly modeled on the *Searching for the Future* (SFTF) weekend workshop:

***Searching For The Future*** is a congregation-wide workshop, led by a congregational fundraising consultant, which has proven effective in dozens of Unitarian Universalist congregations around the country. The weekend begins on a Friday evening with a training session for group facilitators (drawn from the congregation). The consultant leads those facilitators as a focus group through the planning process; on Saturday, the facilitators lead focus groups of other congregation members through the same exercise. (Each focus group session lasts approximately 2 hours.) Summary statements created from the focus groups provide both a draft of an updated mission statement, and a preliminary structure for the planning process, which can then be carried forward by a Comprehensive Plan Committee. The entire process, from the *Searching For The Future* weekend through adoption of the plan at a congregational meeting, can easily be accomplished within one church year.

Professional consultation could be helpful in both of these areas: one to three visits, to attend initial organizational meetings with the Comprehensive Plan Committee, and to facilitate a congregation-wide planning workshop.

Total consulting time would be approximately 2-3 days.

2. Having stressed the value of comprehensive planning, I would recommend that you put off the full planning effort for some months, and allow the present take precedence over the future for the balance of this church year. Give yourselves and your new minister (and later this year, a new DRE) sufficient time to get to know one another, and enjoy the sense of possibility that recent successes have brought. You might focus on a manageable number of short-term goals (*not* related to capital projects) in the coming year, including the important task of reviewing and re-organizing the church's trusts.
3. Look for ways to strengthen the institutional structures of the church. Clarify (and simplify) committee "job descriptions" and staff roles, publicize the results (internally), and make a sustained effort to invite new people to move into leadership roles.
4. Plan and conduct a best-ever, celebratory Annual Canvass for the 2004-2005 church year. Success in this area will take some pressure off the operating budget, allow for more options in allocating cell antenna income, and strengthen the base of support for any future capital fund drive.

There will be many opportunities in all of this work for many members and friends of the congregation to share their hopes and ideas with one another, and to generate not only enthusiasm, but also a stronger sense of community among new and long-time members. In planning your shared future, you can get to know one another on a deeper level, and develop excellent habits of communication with one another in your growing congregation.

In summary, it seems clear that the Unitarian Universalist Area Church at First Parish in Sherborn already possesses many elements necessary to create a very bright future indeed, for all current members and friends, and for many others who have not yet arrived. I wish you all the very best!



# Appendix B: Comprehensive Planning Survey

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This Appendix includes all of the questions asked in the Comprehensive planning survey. The actual survey included space for answers and notes given by those completing the survey.

## Comprehensive Planning 2005 Congregational Survey

Questions are in five general areas:

- Social Action,
- Religious Education,
- Member Integration,
- Adult Programs
- Financial Ambitions

Please answer all the questions that you feel comfortable answering. If there is a question or two about which you have no feelings, skip that/those questions, but continue to answer the rest.

To be counted, we must have your completed survey by March 7. You may place it in the basket in Unity Hall during coffee hour on February 27 or March 6 or you may mail it to the church. (UUAC, PO Box 158, Sherborn, MA 01770)

### Social Action

1. 1.How informed are you about current Social Action programs at UUAC? (Please check the appropriate number.)

**Not at all** **Very**

\_\_\_\_\_1    \_\_\_\_\_2    \_\_\_\_\_3    \_\_\_\_\_4    \_\_\_\_\_5

2. 2.Outside of UUAC, what Social Service/Action/Justice projects do you participate in and/or are passionate about?
3. What does Social Action mean to you?
4. How much time and effort are you prepared to commit to social action projects at UUAC? (e.g., 1 hr/week, 8 hrs/week, 1 event/month, 4 workshops)  
What are the barriers for you?
5. Our Covenant says:  
Love is the spirit of this church, and service is its law.  
This is our great covenant:

To dwell together in peace, to seek truth in love and to help one another.

How would you like to act on that service referred to in our covenant?

Please rank the following beginning with #1 (most important):

- \_\_\_\_\_ Address immediate needs (Social Services i.e. - charity, food for the hungry, etc.)
- \_\_\_\_\_ Learn about social justice issues in the light of our religious tradition  
(Unitarian Universalist Resolutions)
- \_\_\_\_\_ Address root causes of immediate needs (Economic/Social Justice – political action)
- \_\_\_\_\_ Empowerment (Unitarian Universalist Service Committee projects –  
i.e. instead of providing someone with a fish, teach them how to fish.)

## Children and Youth Programming

1. As we grow as a congregation, what qualities do you think are important to keep in our programming for children and youth?
2. Have you taught a religious education class at UUAC within the past five years?  
If so, what were the positive and negative aspects of your most recent teaching experience?  
When did you last teach?  
If not, what could we do that would make this a rewarding or relevant experience for you? Check as many as apply, or add your own:
  - Commit to fewer than 8 weeks of teaching \_\_\_
  - Assist in classroom (i.e., no lead teaching) \_\_\_
  - Participate in special projects \_\_\_
  - Share a special hobby, talent or interest \_\_\_
  - Assist as an occasional substitute teacher \_\_\_
  - Participate in programs that do not occur during the church service \_\_\_
  - Other \_\_\_
3. What programs or activities for children and youth could we add that would further support children and families in our community?
4. What do you see as the top three goals for children and youth as they progress through UUAC?
5. What changes (up to 3) would you make in children and youth programming at UUAC?

## Member Integration

### Especially for new members:

1. What encouraged you as you considered joining our church? Please rate on a scale of 1-5, with 1 being very much.
  - \_\_\_\_\_ Friendly greeting at the door
  - \_\_\_\_\_ Meeting and talking with the minister
  - \_\_\_\_\_ Being welcomed by other members in church and coffee hour

- Literature you were offered
- “Getting to know you” and/or “Roots” sessions
- Quality of worship service and sermons
- Committee involvement
- Knowing more about how the church operates
- Religious education program involvement

2. What would have helped you that was not offered?

**For all members:**

3. What channels would you most like to follow to become more involved (or involved in different ways) in the life of this congregation? (Check as many as apply, or add your own.)

- Concerted efforts for members to meet and engage with newcomers and new members
- Committee work or different committee work
- Seminars and discussion groups (adult programs)
- “Buddy system” between new and “ongoing” members and friends
- Other Suggestions:

4. How have you personally made an effort to meet other members of the congregation during the past year? Did that work for you?

5. Would you be willing to join with other members of the church to help newcomers participate more fully in congregational activities?

6. Other comments:

## Adult Programs

The Adult Programs Task Force has reviewed the possible vision statements that were crafted at the November Comprehensive Planning workshops. There were common themes in terms of what people want UUAC to become. We have taken these themes and proposed some adult programs along these lines. In many instances we already have programs in these areas but we would add further programs.

Vision/Desire	<b>These Visions</b>  <b>Lead To</b>  <b>These Programs</b>	Type of Adult Program
1) Creating a spiritual home		1) Programs to promote Spiritual Growth
2) Personal growth		2) Programs to foster Self-expression / Creativity and help members Find Their Calling
3) Open exchange of ideas		3) Programs that enrich and increase our understanding through General Interest Lectures
4) Self sustaining community with a sacred obligation to the future		4) Teach and mentor/encourage congregants to attend programs in Leadership Skills
5) Form a welcoming community	5) Programs designed to increase social connections such as Curious Travelers	

Type of Adult Program	Your Interest (0 = None, to 5 = High)	Have you participated in a program like this in the past?	Would you be interested in another program in this area?	Would you be interested in helping to plan or lead a program like this?	Your suggestion(s) for a program in this area
<b>Spiritual Growth</b> (e.g. Bible study, Cakes for the Queen of Heaven, etc.)		Yes / No	Yes / No	Yes / No	
<b>Adult "Ministry"/ Finding Your Calling</b> (e.g. find ways for you to contribute to the greater good)		Yes / No	Yes / No	Yes / No	

<b>Leadership Skills Training</b> (e.g. mentorship and skills training for current and emerging church leaders)		Yes / No	Yes / No	Yes / No	
<b>Self Expression/ Creativity</b> (e.g. journaling, creative writing, the arts, drumming, men's group etc.)		Yes / No	Yes / No	Yes / No	
<b>General Interest Lecture Series</b> (e.g. speakers, how-to kinds of classes)		Yes / No	Yes / No	Yes / No	
<b>Curious Travelers</b> (e.g. trips around the area tasting food, the arts, etc.)		Yes / No	Yes / No	Yes / No	

## Financial Ambitions

We are interested in your financial priorities for your church from three perspectives:

- For stewardship of the property,
- For staff and programs, and
- For investing in the future.

The following table summarizes this year's operating budget (July 04 – June 05):

**Table 1: Operating Budget (July 04 - June 05)**

<b>Sources</b>		<b>Uses</b>		
Pledges	53%		Personnel	65%
Cell Income	25%		Building/ Grounds	15%
Trusts	5%		Programs	7%
Alliance	4%		Administratio n	7%
Fundraising	5%		Other	6%

**Table 1: Operating Budget (July 04 - June 05)**

Sources			Uses	
Cash in plate	3%			
	\$271,000	TOTALS		\$271,000

Funds can come from three basic sources:

- Rent including antenna leases (Cell Income),
- The Alliance, trusts including the endowment,
- Active member’s pledges and campaigns.

This year we are pleased to see that we members pledged to cover more than 53% of the budget for operations, up from 44% last year; this despite an ambitious budget increase of 9%. **The goal for the current canvass is to fund all of the personnel costs through our pledges.**

1. PLEDGES: In five years what percentage of the operating budget do you think member pledges should realistically cover? \_\_\_\_\_ %

Comments:

2. YOUR PLEDGE: If you believe that your financial support of your church will increase, what average annual percentage increase feels right for you? \_\_\_\_\_ %

Comments on limitations (fixed income, church experience shortfalls, etc.):

3. FACILITY INVESTMENTS: We are considering plans to restore the soundness of the structure, routinely refresh the cosmetics, and add features like a permanent accessible front entry. One estimate suggests that an additional \$40,000 per year (a 15% increase over the current operating budget) could be wisely used for the foreseeable future. What primary funding source would you prefer?

- \_\_\_\_\_ as a new line item in the operating budget
- \_\_\_\_\_ conduct significant capital campaigns
- \_\_\_\_\_ use funds from antenna leases
- \_\_\_\_\_ a combination of campaigns and antenna

4. USE OF CELL INCOME: Antenna lease income is expected to continue for at least 10 years, logically many more. Annual income will likely be somewhere between \$60,000 and \$90,000 per year with 2 or 3 leases respectively. The Congregation has reluctantly in the past agreed to “invest” all of the antenna income in growing the staff and fixing the building as a way to grow the membership and pledges. Halleluiah, this did pay off. Now we can ask you if we should treat the antenna income differently in the future. Here are some ideas to Rank or Choose (1 is your first choice):

- \_\_\_\_\_ all antenna funds should go to the endowment
- \_\_\_\_\_ a fixed percentage should go to the endowment  
what percentage do you suggest? \_\_\_\_\_ %
- \_\_\_\_\_ the building should have a high priority for antenna funds
- \_\_\_\_\_ antenna funds to be allocated by the congregation each year

5. There is a possibility that we will have a bountiful budget in a few years (the problems never end). In your dreams how might you proportion this hard earned surplus?

The hard questions:

expand facilities on site \_\_\_\_\_%

acquire nearby property (expand office space and parking) \_\_\_\_\_%

local charities \_\_\_\_\_%

Romanian connection (our Partner Church in Romania) \_\_\_\_\_%

general endowment \_\_\_\_\_%

international charities \_\_\_\_\_%

member projects (e.g., Habitat) \_\_\_\_\_%

and your favorite: \_\_\_\_\_ %

Please Elaborate on your Dream:



## Appendix C: Growth Indicators

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### Congregational Growth Indicators, Trends, and Projections

Indicator	Historical trends 2002-2005	Projections
Sunday Attendance	47% increase	Plan for additional service
Membership	26% increase	Membership Staff position
RE Attendance	150% increase	Use off site space
Building Use / Maintenance	Budget increase 86% Double cleaning time	Designate "meeting " night Find / use alternate space
Programs & Participation	More programs, activities, opportunities	Find ways to coordinate
Parking	20% more spaces	Use other lots, develop more land as parking



# Appendix D: Membership Development Coordinator

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## Summary of Role

The Membership Development Coordinator is responsible for helping members and newcomers get and stay connected to the church community.

## Tasks and Responsibilities

- Maintain a database of members and friends' skills and interests.
- Make skills and interests data available as needed to members of the staff and Board of Directors for use in recruiting and placing individuals in activities and positions that serve the growth and needs of the individual and the church community.
- Help members and newcomers to identify activities and programs that can enhance their personal spiritual growth and/or connection to the church community.
- Greet newcomers on most Sundays; serve as the main connection point for visitors and newcomers. Follow up on newcomer visits by writing "thank you for visiting" notes and maintaining communication by telephone and email as necessary. Enter newcomer data into the church database.
- Assist newcomers and friends in navigating through the membership process by helping to define the path to membership, providing an orientation program for newcomers, and being available to answer questions as they arise.
- Coordinate and promote the UUAC Ambassador Program to help integrate newcomers into the church community by pairing them with church members.
- Coordinate and promote the Roots class in the Fall and Spring. Assist the Minister as needed with other courses and training.
- Create and maintain nametags for the entire congregation and all visitors.
- Track visitor and new member attendance.
- Collaborate with the Membership Committee to coordinate events and training sessions such as Welcoming 101, greeter training, and New Member Sunday.
- Work with the Finance Committee to identify newcomers to canvass, contact inactive members to confirm and/or change their membership status, inform newcomers about the pledge process.
- Contribute items to each issue of Crossroads newsletter regarding membership and volunteer opportunities, and promoting programs and activities that can help members and newcomers get involved in the church.
- Consult as needed on issues regarding the bylaws as they pertain to membership.



## Appendix E: Lay Leadership Development

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Vibrant Congregations require strong lay leaders. We must carefully identify, develop and nurture members of the congregation to prepare them to both understand what distinguishes leading a congregation from holding a leadership position in another environment and to insure that they feel fulfilled in leading.

The current Committee on Lay Leadership consists of the following members:

- Pat Manley, Comprehensive Planning Contact
- Mike Webb, Committee Contact

The following tables characterize the lay leadership development plan. Following the listing of the goals, the plan for achieving each goal is outlined.

### Lay Leadership Development Goals

	<b>Primary Goals / Initiative that need to be completed to achieve Comprehensive Planning Five Year vision</b>	<b>Dependencies on other goals</b>
1	Restructure Nominating Committee to Leadership Development Committee	
2	Recruit LLD Committee members	#1
3	Develop Local Training for Committees and Task Forces	
4	Establish Process for Lay Leader recruitment	#1
5	Identify Leadership Training Opportunities	

#### Goal 1: Restructure Nominating Committee

Committee		Lay Leadership Development
Goal name	#1	Restructure Nominating Committee to Lay Leadership Development Committee
Goal Summary		Create a structure which provides opportunities for members of the congregation to develop into lay leaders of the congregation.

	<b>Steps Necessary to complete Goal</b>	<b>Timeline</b>	<b>Roles to accomplish tasks/actions</b>
A	Propose Bylaw change	March 2006	CP Task Force Nominating Committee EComm (Executive Committee)
B	Bring bylaw change to congregational meeting	April 2006	Nominating Committee Executive Committee

## Goal 2: Recruit LDD Committee Members

<b>Committee</b>		<b>Lay Leadership Development</b>
Goal	#2	Recruit LLD Committee members
Goal Summary		Identify potential committee members and ask them to participate

	<b>Steps Necessary to complete Goal</b>	<b>Timeline</b>	<b>Roles to accomplish tasks/actions</b>
A	Seek advice from current leadership, Minister	April 2006	LLDC, Executive Committee
B	Ask people to join	April 2006	LLDC, Executive Committee

## Goal 3: Develop Local Training for Committees and Task Forces

<b>Committee</b>		<b>Lay Leadership Development</b>
Goal	#3	Develop Local Training for Committees and Task Forces
Goal Summary		Find resource within our congregation to develop training module, identify topic, schedule training session

	<b>Steps Necessary to complete Goal</b>	<b>Roles to accomplish tasks/actions</b>
A	Seek advise from current leadership, Minister	LLDC, Executive Committee
B	Determine scope/topic for training	LLDC, Executive Committee
C.	Schedule Training	LLDC, Admin, Trainer(s)

D	Invite Committee, Task Force chairs	LLDC, Executive Committee
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#### Goal 4: Establish a Process for Lay Leader Nurturing and Recruitment

Committee		Leadership Development
Goal	#4	Establish Process for Lay Leader nurturing and recruitment
Goal Summary		Figure out how to find new Lay Leaders

	Steps Necessary to complete Goal	Roles to accomplish tasks/actions
A	Establish a process and a timeline	LLDC
B	Identify potential leaders	LLDC, Membership development coordinator, Minister
C.	Solicit potential leaders	LLDC
D	Match new leaders with training opportunities	LLDC

#### Goal 5: Identify Leadership Training Opportunities

Committee		Lay Leadership Development
Goal	#5	Identify Leadership Training Opportunities
Goal Summary		Ascertain the Training and Development opportunities available through the Mass Bay District, the UUA and other sources



## Appendix F: Children and Youth Programming

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### The Committee for Children and Youth Programming (ChYP)

<b>Committee Name</b>	Children and Youth Programming (ChYP)
<b>Committee Key Contact(s)</b>	Kate Holland, Jennifer Smudin, Christine Schell
<b>Committee LRP Contacts</b>	Mary Ansell, Deb Boyce
<b>Purpose &amp; 5-Year Vision</b>	ChYP will provide: quality religious education programming, with a focus on UU beliefs, principles, spirituality, and moral grounding; community service and social action opportunities; a sense of community within both the ChYP “family” and the church as a whole

### Children and Youth Programming Goals

The following table summarizes the goals for the committee on Children and Youth Programming:

	<b>Primary Goals and Initiatives</b>	<b>Dependence on Other Goals</b>
1	Quality religious education programming/curricula	5, 6
2	Social action and community service	1, 5
3	Sense of community among children, youth, families	1, 2, 5
4	Connection to larger UUAC community	1, 2, 3, 5
5	Maintenance of strong ChYP leadership	
6	Adequate ChYP space, staffing, training, support	

Each goal is described in detail in the tables that follow.

## Goal 1: Quality Religious Education Programming and Curricula

<b>Committee Name</b>	Children and Youth Programming (CHYP)	
<b>Goal Name</b>	#1	Quality religious education programming and curricula
<b>Goal Summary</b>	Provide programming and enrichment experiences that inculcate the seven UU principles into the lives of our children; that encourage their individual and unique spiritual growth (i.e., the spirit of love or truth, the holy, the divine or the gracious); that inspire confidence and a feeling of self-worth, along with compassion and tolerance for all; that enlighten them not only regarding world religions, but also their own Judeo-Christian heritage.	

	<b>Steps Needed to Complete Goal</b>	<b>Roles to accomplish tasks / actions</b>
A	Envision, organize, implement long-term curricula continuum, ensuring that areas of importance to the congregation adequately addressed (UU principles, Judeo-Christian heritage, world religions, personal spiritual growth, etc.).	DRE, REComm
B	Review existing curricula for relevance to continuum plan.	DRE, REComm
C	Purchase and/or develop curricula as needed.	DRE, REComm
D	Develop enrichment activities to support curricula.	DRE, REComm
E	Educate parents and other adults regarding goals, direction and content of ChYP.	DRE, REComm
F	Provide ongoing review of ChYP, making changes/ adaptations as necessary.	DRE, REComm

## Goal 2: Social Action and Community Service

<b>Committee Name</b>	Children and Youth Programming (ChYP)	
<b>Goal Name</b>	# 2	Social action and community service
<b>Goal Summary</b>	Provide a meaningful program of social action and community service projects that allow our children to more fully understand, care for and participate in the larger world around them.	

	<b>Steps Needed to Complete Goal</b>	<b>Resources Needed</b>	<b>Roles to accomplish tasks / actions</b>
A	Review existing projects, both within ChYP and UUAC-wide (see how ChYP can participate more in church-wide projects).	Social Action Comm.	DRE, REComm
B	Brainstorm potential projects, particularly those relating to curricula themes; explore MBD/UUA resources.	Social Action Comm.	DRE, REComm
C	Solicit input from ChYP “family” and UUAC for social action/ service opportunities and/or leadership.	Social Action Comm.	DRE, REComm
D	Establish program of 2 or more social action/service activities/ year (one-time or ongoing).	Social Action Comm.	DRE, REComm
E	Reinforce to children and families the meaning & importance of social action / social service.	Social Action Comm.	DRE, REComm
F	Develop liaison between Social Action Comm. And REComm to coordinate ongoing and potential efforts.	Social Action Comm.	DRE, REComm

### Goal 3: Sense of Community Among Children, Youth, Families

<b>Committee Name</b>	Children and Youth Programming (ChYP)	
<b>Goal Name</b>	#3	Sense of community among children, youth, families
<b>Goal Summary</b>	Encourage a supportive, warm “home” for children and youth that will always welcome them and that will nurture their individual growth as well as their development as responsible and caring world citizens.	

	<b>Steps Needed to Complete Goal</b>	<b>Resources Needed</b>	<b>Roles to accomplish tasks / actions</b>
A	Explore possibility of establishing a support system (either formal or informal) of peers and trusted adults that will nurture and mentor children throughout their growth.	UUAC volunteers	DRE, REComm
B	Sponsor or coordinate at least 3 social or other events each year that are open to the entire congregation and that would foster community-building.		DRE, REComm
C	Continue to support youth groups for middle and high schoolers, so that their connection to UUAC may continue beyond the classroom.	UUAC volunteers	DRE, REComm

## Goal 4: Connection to the Larger UUAC Community

<b>Committee Name</b>	Children and Youth Programming (ChYP)	
<b>Goal Name</b>	4	Connection to the larger UUAC community
<b>Goal Summary</b>	Integrate ChYP into the larger UUAC community, for the benefit of all	

	<b>Steps Needed to Complete Goal</b>	<b>Resources Needed</b>	<b>Roles to accomplish tasks / actions</b>
A	Continue to integrate ChYP into the regular church service; could include coordination of themes between Minister and DRE.	Minister	DRE
B	Encourage ChYP-sponsored church services.	Minister; Worship Comm.	DRE; REComm
C	Early in each church year provide information, available to all members of the congregation, regarding the overall ChYP and curricula.		DRE; REComm
D	Continue using Crossroads to educate congregation regarding ChYP programs, curricula, activities.		DRE; REComm
E	Ensure availability and currency of RE brochure and webpage.		
F	Explore other means of communication to and from the congregation regarding ChYP and activities.		DRE; REComm

## Goal 5: Maintenance of Strong Children and Youth Programming Leadership

<b>Committee Name</b>	Children and Youth Programming (ChYP)	
<b>Goal Name</b>	#5	Maintenance of strong ChYP leadership
<b>Goal Summary</b>	Encourage and support growth of DRE and lay ChYP leadership	

	<b>Steps Needed to Complete Goal</b>	<b>Resources Needed</b>	<b>Roles to accomplish tasks / actions</b>
A	Support professional and lay education and growth through training, networking and attendance at professional meetings and conferences.	Financial	DRE; REComm
B	Facilitate ability of DRE to attend meetings through assistance with day-to-day DRE duties in his/her absence.		REComm
C	As in Goal #6 below, ensure that staffing levels are sufficient for enrollment (attendance) levels, based on UUA guidelines.	Financial	DRE; REComm

## Goal 6: Adequate Space, Staffing, Training, and Support

<b>Committee Name</b>	Children and Youth Programming (CHYP)	
<b>Goal Name</b>	#6	Adequate ChYP space, staffing, training, and support
<b>Goal Summary</b>	Ensure that space, staffing and training opportunities are adequate to provide a meaningful and effective religious education program of the highest quality; generally support ChYP volunteer teachers	

	<b>Steps Needed to Complete Goal</b>	<b>Resources Needed</b>	<b>Roles to accomplish tasks / actions</b>
A	Determine guidelines/norms for classroom space requirements, and work to ensure that adequate space is available.	EComm; MBD; UUA	DRE; REComm
B	Support DRE and REComm education and growth as in Goal #5.	Financial	DRE; REComm
C	Encourage and support teaching experience, creating a variety of entry points for adults and older youth to participate.	UUAC volunteers	DRE; REComm
D	Continue timely availability of curricula and supplemental materials to teachers; refine existing classroom policies; provide training as needed; in general, serve as resource to teachers.		DRE; REComm



## Appendix G: Social Action Survey Summary

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Relevant results of the 2002 Congregational Survey taken during the ministerial search process:

- Social Action was not in the top 6 vote getters in response to the question 'Name three things that need improving in our congregation? Community/Caring, Membership, Spirituality, Church Leadership, Volunteer Issues, Building/Grounds and Children's RE were all of greater importance to our Congregation.
- In response to the question 'What are the main things you would like to see our congregation accomplish or get involved with in the next 3 to 10 years?' 25% of survey respondents provided input categorized as Social Action. Remaining categories of Membership, Buildings & Grounds, Church Leadership, Community & Caring, respectively garnered 13%, 13%, 12%, 11% of the responses. Several responses identified that the Social Action program at UUAC should be a voice of social consciousness to the community.

From this Survey we could interpret that our congregation is reasonably satisfied with Social Action at UUAC and recognizes it is something we need to continue to develop in the future.

As part of the current Comprehensive Planning process the Social Action Subgroup developed a set of questions for the church wide survey to try and discern what Social Action means to members and friends of the UUAC congregation in 2005.

The responses told us the following:

1. Lack of time is by far the most commonly mentioned barrier to wider participation in UUAC Social Action programs by members and friends.
2. The Congregation is equally divided on what they know about current Social Action programs at UUAC, half know what the programs are and the other half don't.
3. There is a wide diversity in types of Social Action programs outside of UUAC that UUAC members and friends participate in.

The most frequently used words/phrases in the responses about outside activities, ranked by count were:

- GLBT and Children's issues
  - Poverty and Hunger
  - Homelessness and Environmental concerns
4. Some of the more prominent areas of concern expressed are:
    - Education
    - Hunger
    - Homelessness
    - GLBT issues
  5. Priorities for Social Action involvement are:

- a - Address immediate Needs (Social Services i.e. – charity, food for the hungry, etc.)
  - b - Empowerment (UUSC projects i.e. teach how to fish rather than giving a fish)
  - c - Addressing root cause of problems (Economic/Social Justice/Political action)
  - d - Learning about social justice issues (in the light of our religious tradition – UU Resolutions).
6. People would like programs in which they can participate as a family.

## Appendix H: Adult Programs Committee Structure

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This appendix summarizes the structure of the Adult Programs Committee:

### Director of Adult Programs

- Manages process of proposing and selecting adult programs to match congregational needs
- Ensures balance of programs in line with congregational desires
- Manages process of offering and giving scholarships for all programs
- Sets fees for programs based on cost/content/estimated number of participants
- Sets budget for adult programs

### Individual Committee Members

Areas:

- Spiritual Growth
- Adult Ministry/Finding Your Calling
- Self-Experience/Creativity
- General Interest/Creativity

Responsibilities:

Committee members will be in charge of:

- Proposing and finding people to teach programs in their respective areas
- Getting programs on calendar
- Publicizing and signing up participants
- Assessing success of programs



# Appendix I: Facilities Reserve Fund Budget

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## Budget Process

A baseline budget projection was made for the next 5 years. The baseline income budget is composed of two pieces: pledge income and all other income. The baseline expense budget is composed of two pieces: personnel and all other expenses.

A reasonable assumption is that the “all other income” and the “all other expenses” were primarily driven by inflation and that they would balance each other, that is, *only pledges and personnel are significant variables in the future.*

The major “other income” sources include the Endowment and antenna leases. The Endowment portion will vary with the investment market which usually exceeds the inflation rate. The antenna leases all have minimum escalation clauses or consumer price adjustment resulting in at least a 4.7% annual increase.

The “other expenses” cover all non-payroll expenses, totalling less than a third of all expenses, with major elements in operating and insuring the facilities, our support of the UUA, expenses of the several committees. These income and expense items will not change significantly.

## The Facilities Reserve Fund

An annual \$18,000 contribution to a perpetual facilities reserve fund has been added to the routine expense budget to allow for timely work on our facilities over the years. See the **Facilities Reserve Fund** table later in the Appendix to get some perspective on how that was derived.

We utilized many studies and statistics regarding income growth. *We determined that growth occurs at varying rates (e.g. our student attendance has doubled in two years while our pledge income has increased 20% per year in those two years). We anticipate a 10% annual increase in pledge income for the next several years.* Members do also contribute significantly to the collection plate and the auction. To be conservative, we assumed that the collection plate and auction income would not increase so that the total income directly from current members would amount to an 8.4% annual increase.

The consequences of misjudging the growth projection are self correcting over time. We will want to hire more staff and increase part time staff in rough proportion to the number of people in church on Sunday. We have learned that vibrant churches have a common mix and quantity of staff in direct proportion to their Sunday attendance. We now fit that curve precisely and anticipate the need for more staff to serve us as we grow. If we grow faster or slower than we had estimated we will almost naturally compensate in our staffing levels. The impact of growth is spread over the years and the impact of the absolute level in any given period will be incorporated in each annual budget cycle.

The current estimate for the results of this fiscal year, ending in June, is shown in the table 2005-2006 **Projected Budget for Reference**. Several changes are shown compared to the annual budget approved by the Congregation in 2005.

Significant increases in income are coming in. Pledges are expected to be higher. The just completed auction was much more successful than expected. The new Endowment with a fixed rate of return on investments was much better than budgeted. The antenna income is better than budgeted as we better defined the actual rate increases. Note that the Woburn Grant for a membership coordinator was for only this year and we propose to continue to fund this position in our operating budget. We have just been awarded a similar sized one-year grant for a communications coordinator. The income sources are stable with the major variable the direct contribution by the members.

Expenses were predicted quite accurately. The facilities major project needs some explanation. The Congregation approved an \$18,000 list of capital projects partially funded by a \$9,000 share of the antenna income with the remainder unfunded by the projected income. The antenna share will be \$11,000 and higher income has covered the rest. The antenna to endowment expense was also voted to be a share of the antenna income and is also higher than expected.

The NET OPERATING SURPLUS line at \$26,000 is the current projection for this year's results. The annual budget predicted a break even budget. This surplus is after paying the \$11,000 return to the Endowment from the antenna income. Budgets for the future will carry the Endowment Investment as a line item for annual consideration by the Congregation.

## 2005-2006 Projected Baseline Budget for Reference

<b>INCOME</b>		
Source	Amount (\$1,000)	Changes from Annual Budget
Pledges	165	was 161
building use	13	
donations & plate	13	
Alliance pledge	12	
Endowment	28	was 19
Auction	19	was 12
Woburn Grant	5	1 year for membership coord.
Antenna space lease	91	was 86, increases 4.7% per year
<b>Total Income</b>	<b>346</b>	<b>was 321 +7.8%</b>
<b>Expenses</b>		
Personnel	210	
Administration	13	
Buildings and Grounds	35	12 is energy costs
Finance	1	was 3 to include canvass dinner
Music	3	
UUA & Programs	24	
Religious Education	5	
Worship	2	
Facilities major projects	18	new (ok if funds found, 11 from antenna)
BoD (w/o antenna surplus)	9	
Antenna to Endowment	11	was 9 (1/2 of antenna over 68.5)
<b>Total Outlays</b>	<b>331</b>	<b>was 321</b>
<b>Net Line Item Surplus</b>	<b>15</b>	<b>was zero</b>
<b>Net Operating Surplus</b>	<b>\$26,000</b>	<b>includes \$11,000 back to Endowment</b>

## Projected Discretionary Income for Personnel, Endowment and New Initiatives

June 2006	2007	2008	2009	2010	2011
\$26,000	\$37,000	\$55,000	\$75,000	\$97,000	\$121,000

- All future personnel raises, additions, and new benefits will subtract from these funds.
- Assumes a 10% annual increase in pledge income after inflation.
- The combination of all other income and expenses is inflation neutral.

## Facilities Reserve Fund

This fund is in excess of the current Building and Grounds operating budget of \$35,000.00. Facilities Reserve Annual Budget = \$18,000.

Item	Cost	Life Est. Years	Annual
furnaces (2)	\$5,000	20	\$250
boiler	8,000	20	400
water heater	500	10	50
well pump	1,000	10	100
well tank/controls	500	20	25
dishwasher and heater	3,000	15	200
elevator overhaul	20,000	20	1,000
space heater CR	1,500	20	75
flooring	10,000	20	500
rug sanctuary	10,000	10	1,000
windows, not sanct.	15,000	30	500
doors, exterior	8,000	20	400
roofing	60,000	20	3,000
bathroom fixtures	2,600	20	130
chimney	10,000	40	250
organ	50,000	25	2,000
piano	8,000	40	200
outside painting	30,000	10	3000
septic system	50,000	40	1,250
fence	10,000	25	400

paving	40,000	25	1,600
outside lights	2,000	10	200
Total			\$17,500

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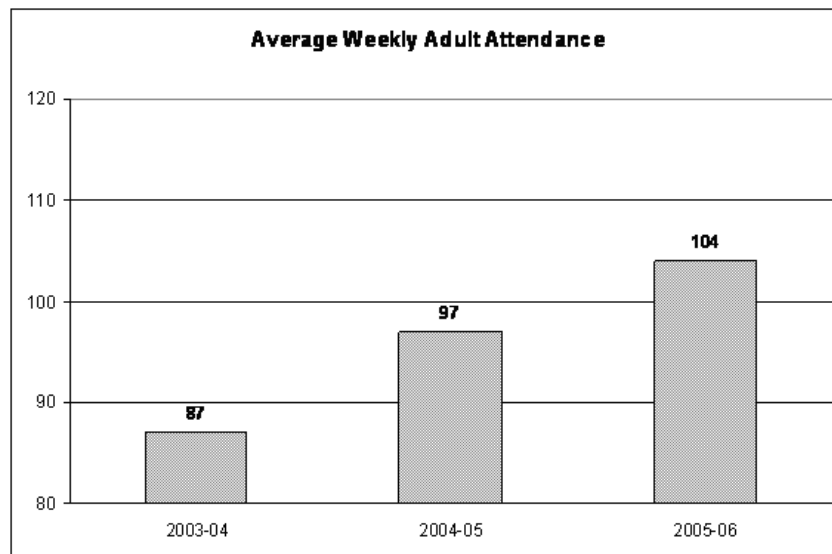
## Appendix J: Attendance Data

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The following graphs summarize attendance data from the 2003-2004 church year to the 2005-2006 church year.

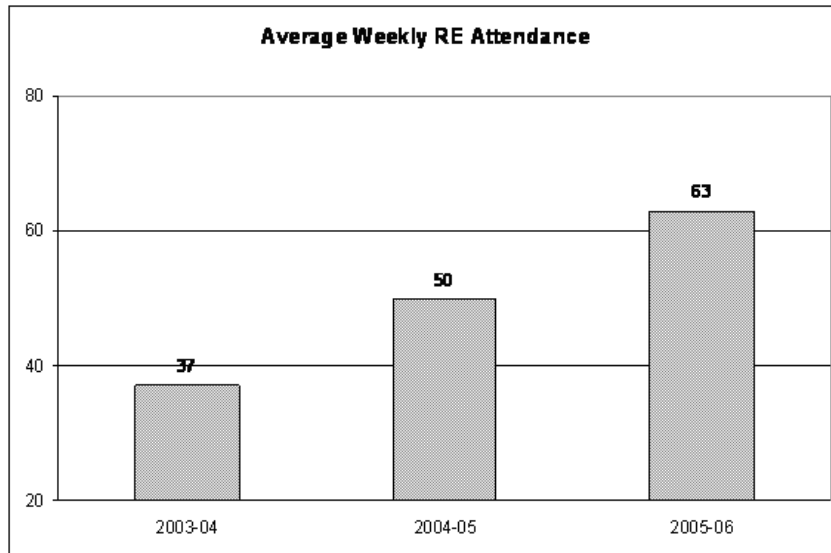
### Average Weekly Adult Attendance

The following graph illustrates the increase in weekly adult attendance from the 2003-2004 church year to the 2005-2006 church year. The average number of adults in Sunday worship has risen from 87 to 104.



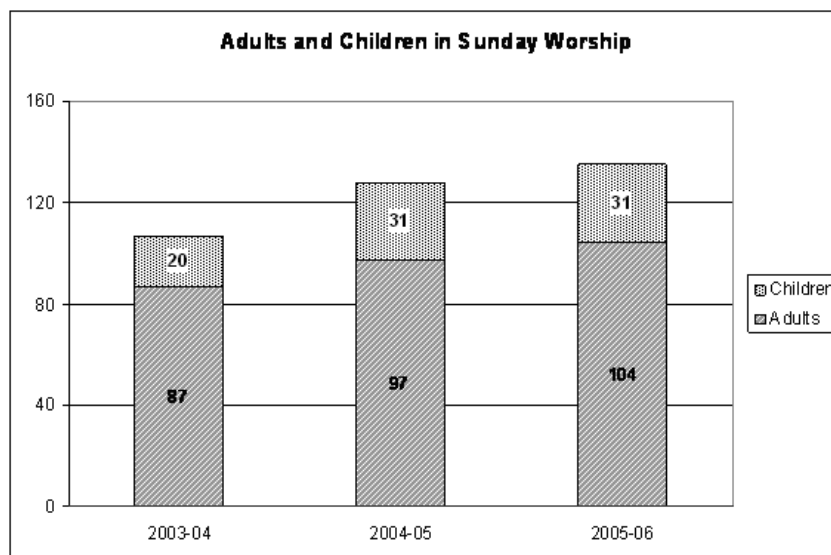
## Average Weekly RE Attendance

The following graph illustrates the average weekly attendance of children in Religious Education classes from the 2003-2004 church year to the 2005-2006 church year. The number of children attending RE (including nursery) has risen from 37-67.



## Adults and Children in Sunday Worship

Our sanctuary is increasingly full on Sundays, with adults and children. The following graph illustrates the average weekly attendance of adults and children from the 2003-2004 church year to the 2005-2006 church year.



# Sunday Participation

Sunday participation includes all adults, whether or not they are in the Sanctuary, and all children: those who begin in the Sanctuary and those who are not in the Sanctuary (nursery, preschool, and kindergarten, Our Whole Lives).

