

Long Range Plan
of
Second Unitarian
Church

Approved by Congregation:
October 24, 2004

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To: Second Unitarian Church Board of Trustees
From: Long Range Planning Committee
Date: October 14, 2004

The following is the Long Range Plan and supporting materials prepared by the Long Range Planning Committee over the past 24-month period. In that time we conducted a comprehensive survey of current members, friends, and previous members. We also made progress reports at two town hall meetings on March 2, 2003 and October 19, 2003 and at the annual meeting on May 16, 2004. In April 2003 we conducted interviews with all major committees at one of their regularly scheduled meetings. In May and June 2003, we held small group meetings within the context of circle suppers. All of these sources of information led us to focus on four major areas in the long range plan:

- **Membership Growth & Development** - to create a strategy for attracting and integrating new members; to facilitate the concept of "shared ministry" where members appreciate that their work within the church is their ministry; to help members understand leadership and develop their leadership skills; and to create structures within the congregation that would allow members to experience the continuity of intimacy even as the church grows numerically.
- **Facility Solutions (long & short term)** - to determine short-term space needs in coordination with membership and attendance growth; and to adapt the plan to meet long-term space needs consistent with congregation size and financial ability to undertake that change.
- **Stewardship Promotion (long & short term)** - to provide a better understanding to the members about finances; to foster a culture of abundance; and to plan for the long term through endowments and other planned giving.
- **Becoming a Beacon of Liberal Religious Values in the Omaha Community** - to provide opportunities for current members to strengthen their understanding and articulation of Unitarian Universalism which can then lead to living the faith tradition out in the community through a unique mission identifiable to Second Unitarian as well as other initiatives.

The objectives are presented with action items and a suggested timeline, but will need to be monitored and adjusted periodically over the next three to five years. A 5-year budget shows the projected cost of this plan.

As we looked at these objectives, the committee believed it was important to develop them in the context of the four types of growth presented in Loren Mead's book, *More Than Numbers: The Ways Churches Grow*. The four types of growth are:

- Numerical - relating to church membership, attendance, budget, and activities.
- Maturational - relating to how each member grows in stature, maturity, faith, and ability to nurture and be nurtured.

- Organic - relating to how the congregation grows as a functioning community and its ability to maintain itself and reach out to work with other institutions in the community.
- Incarnational - relating to the ability of the congregation to take its values and beliefs and make them real in the world and society outside of the congregation - living out the faith traditions in the community.

It is important to have a balance of all of these types of growth so that as numbers grow, the maturity and understanding of the congregation is also growing and there is a solid, thriving institution to support current and new members as our congregation lives out its mission.

Based on feedback from the survey and small group meetings it was determined that our mission statement needed to be rewritten. A daylong workshop was held with all members of the congregation invited to participate. The new mission statement was created from the many ideas presented that day. We believe this mission statement will lead us well as we carry out the vision of this plan.

We also looked at demographic information within the congregation and throughout the community at large. Based on maps provided by District Executive Nancy Heege, using our information on visitors, new members, and current members, we can see that this congregation draws from the entire community. Should we reach a point where we want to relocate to another facility, understanding the demographics is very important. We have included in the budget request for this year funds to do a more in-depth demographic study to ensure making as informed a decision as possible.

Included with the plan are the survey instrument and the rankings for each question plus the questions presented at the committee interviews and small group meetings. Also included are recommendations for promotion and marketing established by a subcommittee focused on membership development. Members of that subcommittee were Sue Aschinger, Alison Maheux, Richard Koelling, Anita Jeck and Cheri Cody.

We give our thanks to all of the members and friends of the congregation who have given their time and effort to participate in this process. We also appreciate their patience as this has been a long process and we are happy to present this report.

Respectfully submitted,

The Long Range Planning Committee

Cheri Cody, Chair	Anita Jeck	Bill MacMillan, Board Chair (04/05)
Steve Brown	Craig Piquette	Clyde Anderson, Board Chair (03/04)
Jim DeCoster	Rev. Josh Snyder	Marcia Forbes, Board Chair (02/03)

MISSION STATEMENT

“Second Unitarian Church of Omaha is an inclusive and nurturing religious community engaged in thoughtful pursuit of truth and meaning. Our mission is to grow as a beacon of hope - sharing a vision of a world community that embraces diversity and promotes justice and respectful stewardship within the interdependent web of existence.”

Adopted May 16, 2004

MISSION GOAL I: MEMBERSHIP GROWTH & DEVELOPMENT

To achieve the overall goals of this Long Range Plan, it will be important that the number of members in the church grow each year over the next five years. An achievable rate of net growth would be 5% per year. Using this growth rate, we project an adult membership of nearly 160 in five years. Of this growth of approximately 40 members, we project that $\frac{1}{4}$ will be empty-nesters/baby-boomers, $\frac{1}{4}$ will be young adults, and $\frac{1}{2}$ will be families with children.

Based on information available, the number of annual visitors to Unitarian Universalist churches typically averages one and a half to two times the membership. But only 1% of those visitors are retained as members. At Second Unitarian Church our record of membership growth is higher than that 1%. We know, however, that numerical growth alone is not sufficient as an objective. We must also ensure maturational growth through various strategies for membership development.

Membership growth and development encompasses many levels. These levels are not necessarily sequential but can be happening concurrently:

1. Attracting new people to the church
2. Welcoming and integrating new members into the church and supporting members in their endeavor to find meaning in life
3. Helping members discover their gifts and how to share that ministry in the church
4. Offering opportunities for members to develop their leadership skills for use within the church and in the greater community.

Objective 1 - Attracting new people to the church (Numerical)

Part of the process of welcoming new people to the church focuses on ensuring the church is appealing, greeting people on Sunday morning, following up after the visit, orienting new members, and creating a space for them within the church activities. The committee looked at several demographic groups that we might target in our marketing. Given our current resources of people and money, we determined that we could not focus on all demographic groups but chose three groups for initial efforts. Those groups are *Young Adults Without Children*, *Families With Children*, and *Empty Nesters/Baby Boomers*. Appendix A is a chart developed by the Membership Development subcommittee of the Long Range Planning Committee which details potential events and marketing activities that might be used to achieve this goal. These activities are not geared to a particular geographic area of Omaha as members and visitors come from all parts of the metro area. The attached maps in Appendix B show where members, friends and visitors of Second Unitarian live.

Action Items	Responsibility	Timeline
1. Investigate resources needed to implement events recommended by Membership Development Committee	Membership Committee	January 2005
2. Develop strategy for implementing most effective marketing tools for each group and activity.	Membership Committee	March 2005
3. Integrate activities with those outlined in Becoming a Beacon of Liberal Religious Values (See Mission Goal IV)	Membership Committee	Ongoing
4. Ensure that web site provides complete & timely info about the church	Technology	Ongoing

Objective 2 - Welcoming and integrating new members while supporting existing members in their ongoing religious and spiritual growth (Maturational)

With the understanding that people are joining the church to meet their spiritual and religious needs, it is critical to find ways for all members to do their exploration in a context that is comfortable for them. In some cases, that may be through small group discussions such as covenant or affinity groups; for others it may be access to reading materials that stimulate their thought; and for others it may be social events such as circle suppers or intergenerational activities. These measures incorporate a practice of vibrant hospitality to ensure a place for everyone. The creation of a New Member Coordinator position would help facilitate this maturational growth.

Action Items	Responsibility	Timeline
1. Offer regular adult religious education classes as opportunities for new and long term members to share in the ongoing process of religious questioning and spiritual development.	Adult R.E. (Spiritual Education)/ Membership/ Minister	Twice a year for 5 years
2. Create covenant and affinity groups based on specific interests and other groups with generic interests. These groups may form from the classes proposed in #1 above.	Adult R.E./ Minister	2004 & ongoing
3. Determine interests of new members through conversation, interest survey, or mentor.	Membership	2004/2005
4. Establish new member coordinator on Membership Committee.	Membership	2005/2006
5. Extend special invitation to new members to join existing groups such as book club, women's group, choir, etc.	New Member Coordinator	2005 & ongoing
6. Only if interest indicated by new member, invite to participate in some phase of committee work.	Membership/New Member Coordinator	2005 & ongoing

Action Items	Responsibility	Timeline
7. Train a few volunteers, who are comfortable in articulating their UU beliefs, in the art of conversation to learn newcomers' impressions and what would make the congregation attractive to them.	Membership	Jan 2005

Objective 3 - Helping members discover their gifts and how to share that ministry in the church (Maturational)

This Long Range Plan introduces a new mission statement for Second Unitarian Church. It is this mission statement that guides us in doing the work of the church. Each member has gifts and talents that can contribute to the ministry of the church whether it be work for internal events or work in the greater community. Discovering their gifts and how best to use them to meet the mission lets members develop an ownership of and commitment to the church and its work. Having a structured process for helping members discover their gifts is essential to the long term health and growth of the congregation.

Action Items	Responsibility	Timeline
1. Implement curriculum in <i>Unison, Voluntarism and Spirituality</i> .	Adult R.E./ Minister/ Committee on Ministry	2005/2006
2. Invite members into ministries of leadership and service.	Minister/ Committee on Ministry	2005 & ongoing
3. Offer one or more youth choirs and begin consideration of paid music director	Music & Worship	2008/2009

Objective 4 - Leadership Development (Organic)

As the congregation grows, the need for competent and knowledgeable leaders also grows. Much of what keeps a congregation healthy is having leaders who understand the systems of organized groups, specifically congregations. One of the issues that has surfaced is effective communication, so developing leaders with good communication and interpersonal skills is vital for healthy congregations. By planning in advance to train leaders, talent will be available when needed for committee chair or board of trustee positions.

Action Items	Responsibility	Timeline
1. Transition Ministerial Relations Committee to become Committee on Ministry which would provide leadership for the practice of shared ministry plus monitor, evaluate, and provide advice regarding every facet of the congregation's ministry, both lay and professional.	Minister/Board/ Committee on Ministry	2004/2005

Action Items	Responsibility	Timeline
2. Identify people with interest and aptitude to become leaders and invite to training. Cultivate, educate and mentor individuals who show promise of leadership.	Board/ Committee on Ministry/ Nominating Committee/ Minister	Ongoing
3. Offer classes on different working styles, what motivates volunteers, valuing differences in style or motivation to potential leaders.	Board/ Minister/ Committee on Ministry/ Nominating Committee	Ongoing
4. Continue to include leadership training component at meetings for committee chairs based on strategy to develop needed skills.	Board/Minister	Ongoing
5. Encourage members to attend District level workshops.	Denominational Affairs/Board	Ongoing
6. Grow budget to include annual funding for leadership training at Leadership School, Leadership Conferences, and District Annual Conference.	Board/Finance	2005/2006
7. Be intentional about having a chair in training for each committee.	Committee Chairs	Ongoing



MISSION GOAL II: FACILITY SOLUTIONS

The current building housing Second Unitarian Church is a warm, welcoming home, loved by the church members. While it has served the congregation well over the years, the recent growth in membership has shown that space is becoming a critical issue and may become a constraint on the growth of the church. This spatial constraint may not only prevent our church membership from growing at its current rate, but it may also impede the organic and maturational growth of the congregation.

The most readily apparent manifestation of this space limitation can be seen in the sanctuary, the parking lot and the Religious Education classrooms. The sanctuary is an adequate size for the typical Sunday service, but for larger services such as holidays, special Sundays and memorial services, the attendance reaches or exceeds capacity (125). The parking lot fills up every Sunday, and members, friends and visitors are required to park on the streets. The greatest need for space, however, is felt in the Religious Education (R.E.) classrooms in the lower level. All classrooms are utilized and

are close to capacity. Common areas such as the R.E. central worship area and the kitchen have been utilized as classroom space.

It is clearly evident that if the church hopes to increase its membership over the next five years, the building will be able to absorb only a modest increase in membership. Moreover, the appearance of spatial limitations may cause visitors to feel there is not room for them in the church, and may slow membership growth before the church actually reaches maximum capacity.

While the sanctuary, parking lot and Religious Education classrooms are the most visible manifestations of the church's space limitations, the need for more space extends into virtually all aspects of the workings of the church. The results from the survey and small group meetings indicated that there is a desire and will soon be a need for a fellowship hall, office space for the Director of Religious Education, and a larger kitchen. When marketing efforts recommended by the membership development subcommittee are implemented and program offerings increase, there will be a need for multifunctional rooms that could be used for Adult Religious Education classes, committee meetings, covenant group meetings, special programs, music rehearsals, and a library.

Currently, it is common to have different committees or programs meeting at the same time, competing for limited space in the building. Such needs demonstrate that the current building is potentially beginning to limit the organic growth of church members, by not allowing sufficient space for the various programs. This plan projects that we will need discrete space for three simultaneous adult educational or committee meetings on weeknights. Similar space is needed on Sunday mornings both before and after the service to accommodate rehearsals, committee meetings and special events.

Another space issue is handicap accessibility. The church has made strides in increasing handicap accessibility in the past year through construction of the ramp to the front door and the renovation of the downstairs bathroom. However, the lack of a bathroom on the main floor remains a significant obstacle in making the building accessible to all. The lack of main floor facilities provides a hardship to several current members, may dissuade some visitors from returning or joining, and runs counter to our mission of inclusiveness.

A two-tiered approach is recommended to address the space limitations associated with the building:

1. Short-term solutions that would be addressed over the next year to provide immediate relief to the space constraints.
2. Long-term solutions implemented over the next 5 years that plan for growth.

Objective 1 - Short-term solutions to provide immediate relief for space constraints. (Organic)

These solutions allow the congregation to make an informed and judicious decision about the best and most feasible approach to expanding needed space. Religious education has made some adaptations in use of their space but with more children, adding space will become a necessity. There is also a need for additional meeting room space for committees so that multiple activities can take place concurrently.

Action Items	Responsibility	Timeline
1. Establish ad hoc Facility Committee to research short term facility expansion options.	Board	2004/2005
2. Bring recommendations of Facility Committee for congregational vote	Facility Committee/ Board	Sept 2005
3. Establish financing strategy	Facility Committee/ Finance Committee	2005/2006
4. Implement short term strategy	Facility Committee	2005/2007
5. Be prepared when church again reaches capacity to consider offering two services on Sunday morning until membership is sufficient to support long term solutions.	Music & Worship/ Membership/R.E./ Fellowship	Planning-2005/06 2006/2007
6. Restripe the parking lot with angled parking to increase number of cars that could be parked on property.	Building & Grounds	2004/2005

Objective 2 - Long term space solutions. (Organic)

The Assessment Visit Report of January 2004 by David Rickard (See Appendix C) recommends "consideration of an alternative site for the congregation as the current site does not seem to have enough land to accommodate the additional space that appears to be needed". The report recommends giving "special consideration to the purchase of an existing building, as this can save money over constructing a new building. Such an endeavor would require conducting a capital campaign to raise between \$300,000 and \$500,000. This campaign, combined with the value of the current property and money to be borrowed could place this congregation in a building that would satisfy their needs for many years to come.

Objectives	Responsibility	Timeline
1. Appoint Exploration Committee to research and monitor potential relocation sites.	Board	2004/2005
2. Work with Campaign Consultant to complete plan for campaign for other space.	Long Range Planning	2007/2008
3. Hire architect/consultant to determine space needs.	Board	2007/2008
4. Create building/construction committee to implement plan.	Board	2008/2009



MISSION GOAL III: PROMOTING STEWARDSHIP

To achieve the objectives of Membership Development and Facility Solutions, along with the ongoing operation of the church, a focus on stewardship is critical. History has shown that this is a congregation of members who care deeply about the church and are willing to make sacrifices to ensure its success. As we move forward in our growth, emphasis will be on the connection between budget and mission, believing in the culture of abundance, and securing financial stability through short term and long term financial planning.

The budget projections for the long range plan are based on the following assumptions:

- increasing number of pledge units by 3% annually
- increasing pledge income annually
- 2006-2007 is the first full year of expenses resulting from the facility expansion project necessitating a 13.6% increase in pledge income that year and smaller increases the other four years

Focus on four areas can help us achieve effective stewardship:

1. Creating a Mission-Based Balanced Budget
2. Fostering a Culture of Abundance
3. Establish an Annual Fundraising Event
4. Developing a Long-Term Financial Plan

Objective 1 - Creating a Mission-Based Balanced Budget (Organic)

Since the congregation returned to full time ministry in 2000-01, the budget has increased incrementally. The budget at the time of the last long range plan in 1998-99 was \$40,252. The approved budget for 2004-05 is \$125,196. The 2004-05 budget is the first budget since 2000-01 that does not rely on UUA/Prairie Star District grants or our reserve.

Since the calling of a minister, the members of Second Unitarian Church of Omaha have responded well to each pledge drive and the number of pledge units has steadily increased.

Our budget has grown as members asked for new programs and services, but it is understood that restraint in spending and fiscal responsibility are also required. The best means to control spending include utilizing zero-based budgeting - a budgeting

process that focuses on the mission of the church and those of the committees that serve the church.

Our mission statement defines who we are as a religious institution and contains our aspirations for a bright future. As committees begin their budgeting process in December each year, the process will require committees to reexamine their core missions and how their mission fits with the mission of the church. If an item or program does not fit the mission, it should not be in the budget.

Zero-based budgeting places the responsibility for justifying the committees' budgets within the committees themselves. All committees will have a zero budget until they justify the expense and that justification is tied to the mission. In an effort to be always thinking about the church's mission, committees will be asked to make conscious decisions about how their budgets fit the mission and incorporating this thinking as a committee routine to achieve the goal of fiscal responsibility.

Action Items	Responsibility	Timeline
1. Achieve mission-based balanced budget.	Finance, Board	2005/2006
2. Promote the idea of becoming a "green" congregation saving resources and expenses over long term.	Social Justice, Board	2004/2009

Objective 2 - Fostering a Culture of Abundance (Maturational)

One of the most powerful messages, conveyed by David Rickard, the UUA financial consultant who visited in January 2004, was one echoed by Michael Durall in his book *Creating Congregations of Generous People*. "Charitable giving should make some difference in how we as religious people experience life from day to day." The goal of the annual pledge drive should be to foster stewardship among the congregation.

Action Items	Responsibility	Timeline
1. Develop plan for ensuring members' understanding of "giving to mission" and "mission-based budgeting."	Finance, Board	2004/05 & ongoing
2. Implement 12-month stewardship campaign.	Finance	Ongoing
3. Implement 'Fair-Share' giving and acknowledge contribution and commitment.	Finance	2004 & ongoing

Objective 3 - Establish an Annual Fundraising Event (Organic)

One means to promoting stewardship would be to hold an annual community fundraiser that adds value to the community. This fundraiser would be a means of sharing our ministry, and would tie into maturational growth through providing outreach into the community. The vehicle could be a social justice event, an art sale, a musical program

or forums for speakers of note that espouse our views. A committee within the Finance Committee structure would need to be created to plan and organize such an event. This group would have to draw from a large cross-section of the congregation to entertain ideas for the fundraiser. This ongoing effort will also contribute to the incarnational growth of the congregation by projecting our values to the greater Omaha community.

Action Items	Responsibility	Timeline
1. Establish a committee within the Finance Committee structure to be charged with organizing and conducting an annual fundraising event with community appeal.	Finance	2004/05

Objective 4 - Developing a Long-Term Financial Plan (Organic)

A long-term objective for the church is to establish an endowment fund of sufficient size to provide financial security. Successful establishment of a planned giving program will take multiple years. The planned giving program can build on the current memorial funds donated to the church in remembrance of former members. A Memorial Gift policy was recently established.

Endowment funds and the interest from those funds would not be used to fund annual operating expenses in the foreseeable future. The level to which the fund must grow before proceeds can be withdrawn will be outlined in a spending policy written by the Finance Committee and approved by the Board. Eventually proceeds may be withdrawn but only for the enrichment of the congregation or in hard times to support the operating fund.

Action Items	Responsibility	Timeline
1. Educate members on the financial benefits of planned giving.	Finance	Ongoing
2. Create Endowment Fund.	Finance	2004
3. Establish Endowment Fund Management Policy	Finance, Board	2004



MISSION GOAL IV: BECOMING A BEACON OF LIBERAL RELIGIOUS VALUES IN OMAHA.

These liberal religious values include religious questioning, social justice, reason, community, acceptance, compassion, and spiritual exploration. Two areas of focus to becoming a beacon are:

1. Articulating Unitarian Universalism
2. Becoming a center for religious faith, ethics, and values

Objective 1 - Articulating Unitarian Universalism (Maturational)

One of the needs expressed by members in the Long Range Plan survey was the ability to articulate Unitarian Universalism for themselves and to others. Understanding Unitarian Universalism and one's particular perspective on Unitarian Universalism are prerequisites for explaining Unitarian Universalism to others. To help people practice sharing their faith with others, the *Articulating Your UU Faith* curriculum could be offered on a regular basis. Enthusiastic members of the *Articulating* class might join together to form an "Evangelism Task Force." The purpose of this Task Force would be to seek out new people interested in discussing Unitarian Universalism. The Evangelism Task Force could seek out opportunities in the Omaha community to speak out about UU values and principles. One example of this would be interfaith dialogue with people from other churches and religious organizations.

Action Items	Responsibility	Timeline
1. Offer <i>Articulating Your UU Faith</i> or similar class on a regular, even annual, basis. Encourage the more enthusiastic participants of the course to form a new group called the "Evangelism Task Force" or something to that effect.	Minister, ASEC	2005 & ongoing
2. Programs built around articulating UU identity. (Ex. UUs and interfaith dialogue)	Minister, Evangelism Task Force	2008

Objective 2 - A Center for Religious Faith, Ethics, and Values (Incarnational)

Incarnational Growth is growth in the community in which a congregation is embedded. A church with a significant impact in its community, a high profile, and the ability to create and direct a public conversation will have accomplished a lot of incarnational growth to reach that status. The following goals are intended to further the incarnational growth of Second Unitarian Church in the Omaha community by raising our profile in the community as a center for liberal religious values. One of the ways in which this can occur is by creating an Outreach Committee that could be led by an At-Large Board member. The responsibilities of this Outreach Committee are detailed in the objectives below.

a. Develop an outreach mission that is unique and identifiable to Second Unitarian Church of Omaha.

An Outreach Mission is a project or issue that inspires and mobilizes members of the Congregation into taking action in the Omaha community. It is something we do because we care about the world. It connects not only to the needs in the community, but also to the "hopes and hurts" of members of Second Unitarian Church. Kennon Callahan, in his book *Twelve Keys to an Effective Church*, lays out a process of discerning mission in congregations. The congregation, through a process and under the leadership of the Outreach Committee, would identify the mission of the outreach.

Action Items	Responsibility	Timeline
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1. Form an Outreach Committee consisting of leaders from a number of different committees.	At-Large Board Member, Select Comm. Chairs	2005
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Action Items	Responsibility	Timeline
2. Conduct surveys and small group meetings among members to discuss their passions, hopes, and dreams for the Omaha community.	Outreach Committee	2007
3. Conduct a Church-wide workshop on developing an outreach mission for the Church.	Outreach Committee	2007
4. Create programs focused on the mission that comes out of the workshop.	Outreach Committee	2008

b. Sponsor public forums for issues of interest to the community.

One of the ways to be recognized as a center for liberal religious values is to sponsor programs, such as public forums, speakers, and other activities of interest to the general public and hold the activities at the church. It is important to gear these programs to the interests of those *outside* the Congregation. These may or may not relate directly to the Outreach Mission that has been discerned in Objective 2-a. All of these public forums should be compatible with our values as Unitarian Universalists. To this end, some research will be needed to determine what is of interest to people outside the Church. Once this has been ascertained, the Outreach Committee would need to match the needs and interests of the community with the resources of the congregation. Space, money, and time are all resources at the church's disposal that can enable or limit our capacity to sponsor public forums. Once this plan has been laid out, the Outreach Committee can then move on to advertising and implementation.

Action Items	Responsibility	Timeline
1. Research the needs and interests of the Omaha community for possible program topics.	Outreach Committee	2005
2. Create strategic plan to match the resources of the Church with the interests of the Omaha community.	Outreach Committee	2006
3. Develop church programs to marshal the resources in order to meet the needs of the Omaha community.	Outreach Committee, Minister	2006
4. Schedule events and programs and advertise as widely as possible.	Outreach Committee, Membership	2006

c. Encourage new and diverse rentals for the Church building.

Another way to become a center for liberal religious values in the Omaha community is to actively seek outside groups who share those values to rent our Church building at a reduced rate. The Outreach Committee will devise a strategy for marketing the rental of church facilities.

Action Items	Responsibility	Timeline
1. Revise rental policy so it reflects role and recommendations of the Outreach Committee	Outreach Committee,	2005
2. Board will make a commitment to advertising and visibility within the Church's budget starting with 2005/2006 budget.	Board, Outreach Committee	2005 & ongoing
3. Outreach Committee will be responsible for recruiting renters	Outreach Committee	2005 & ongoing

2004 Long Range Plan - Second Unitarian Church Five-Year Operating Budget Projections

	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	Assumptions
# of Members	124	130	137	144	151	158	5%
# of Children in R.E.	40	42	43	45	47	49	4%
# of Pledge Units	87	90	92	95	98	101	3%
% Increase in Pledging	19.7%	5.1%	13.6%	4.6%	3.5%	3.6%	
Income							
Membership Pledges	\$ 113,696	\$ 119,455	\$ 135,662	\$ 141,962	\$ 146,880	\$ 152,151	Balance Exp.
Sunday Offering	\$ 3,000	\$ 3,195	\$ 3,403	\$ 3,624	\$ 3,859	\$ 4,110	6.50%
Rent	\$ 3,000	\$ 3,120	\$ 3,245	\$ 3,375	\$ 3,510	\$ 3,650	4%
Other (new Pledges, Gifts, etc.,)	\$ 4,000	\$ 11,300 (1)	\$ 4,160	\$ 4,160	\$ 4,326	\$ 4,326	4%
From Reserves (Savings)							
Elvera Boggs Fund	\$ 1,500						
Sabbatical Fund withdrawl			\$3,400 (2)				
Total Income	\$ 125,196	\$ 137,070	\$ 149,869	\$ 153,121	\$ 158,576	\$ 164,238	
Expenses							
Employee Expense							
Minister Compensation	\$ 58,204	\$ 60,532	\$ 62,953	\$ 65,472	\$ 68,090	\$ 70,814	4%
Office Administrator Salary	\$ 11,100	\$ 11,500	\$ 11,750	\$ 12,000	\$ 12,375	\$ 12,750	From Rev. Snyder
Director RE Salary	\$ 9,600	\$ 10,372	\$ 11,143	\$ 11,915	\$ 12,687	\$ 13,458	From Rev. Snyder
Dir RE Professional Expenses	\$ 600	\$ 624	\$ 649	\$ 675	\$ 702	\$ 730	4%
Payroll Taxes	\$ 1,500	\$ 1,586	\$ 1,660	\$ 1,734	\$ 1,817	\$ 1,900	7.25%
Total Employee Expense	\$ 81,004	\$ 84,614	\$ 88,155	\$ 91,795	\$ 95,671	\$ 99,652	
General Expense							
Administration	\$ 1,300	\$ 1,326	\$ 1,353	\$ 1,380	\$ 1,407	\$ 1,435	2%
Copier	\$ 3,382	\$ 3,450	\$ 3,519	\$ 3,589	\$ 3,661	\$ 3,734	2%
Postage	\$ 1,300	\$ 1,326	\$ 1,353	\$ 1,380	\$ 1,407	\$ 1,435	2%
Janitorial & Supplies	\$ 5,000	\$ 5,500	\$ 6,000	\$ 6,120	\$ 6,242	\$ 6,367	Port Bldg+2%
Telephone + Internet Access	\$ 1,200	\$ 1,530	\$ 1,561	\$ 1,592	\$ 1,624	\$ 1,656	2%
Treasurer Administrative Expense	\$ 700	\$ 714	\$ 728	\$ 743	\$ 758	\$ 773	2%
Insurance	\$ 3,500	\$ 4,500	\$ 5,100	\$ 5,202	\$ 5,306	\$ 5,412	Port Bldg+2%
Mortgage Payment	\$ -	\$ 4,020	\$ 8,040	\$ 8,040	\$ 8,040	\$ 8,040	See note 3
Utilities	\$ 3,000	\$ 3,700	\$ 4,100	\$ 4,182	\$ 4,266	\$ 4,351	Port Bldg+2%
Denominational Dues	\$ 8,370	\$ 9,040	\$ 9,763	\$ 10,544	\$ 11,387	\$ 12,298	8%
Childcare	\$ 400	\$ 408	\$ 416	\$ 424	\$ 433	\$ 442	2%
Board and Leadership Training	\$ 2,145	\$ 2,188	\$ 2,232	\$ 2,276	\$ 2,322	\$ 2,368	2%
Meetings/Food	\$ 125	\$ 128	\$ 130	\$ 133	\$ 135	\$ 138	2%
Total General Expense	\$ 30,422	\$ 37,829	\$ 44,293	\$ 45,604	\$ 46,988	\$ 48,450	

2004 Long Range Plan - Second Unitarian Church Five-Year Operating Budget Projections

	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	Assumptions
# of Members	124	130	137	144	151	158	5%
# of Children in R.E.	40	42	43	45	47	49	4%
# of Pledge Units	87	90	92	95	98	101	3%
% Increase in Pledging	19.7%	5.1%	13.6%	4.6%	3.5%	3.6%	
<u>Committees</u>							
Music and Worship	\$ 2,500	\$ 2,525	\$ 6,000 (2)	\$ 2,576	\$ 2,602	\$ 2,628	1%
Building and Grounds	\$ 1,300	\$ 1,750	\$ 2,000	\$ 2,040	\$ 2,081	\$ 2,122	Port Bldg+2%
Religious Ed - Children	\$ 1,157	\$ 1,169	\$ 1,180	\$ 1,192	\$ 1,204	\$ 1,216	1%
Youth Director	\$ 2,000	\$ 2,020	\$ 2,040	\$ 2,061	\$ 2,081	\$ 2,102	1%
Religious Ed - Adults	\$ 250	\$ 253	\$ 255	\$ 258	\$ 260	\$ 263	1%
Fellowship	\$ 350	\$ 354	\$ 357	\$ 361	\$ 364	\$ 368	1%
Library	\$ 100	\$ 101	\$ 102	\$ 103	\$ 104	\$ 105	1%
Membership	\$ 1,278	\$ 1,316	\$ 1,356	\$ 1,397	\$ 1,438	\$ 1,482	3% advertising for growth
Long Range Planning	\$ 1,650	\$ 1,667	\$ 1,683	\$ 1,700	\$ 1,717	\$ 1,734	1%
Social Justice	\$ 650	\$ 726	\$ 785	\$ 849	\$ 866	\$ 893	OTOC + \$100
Caring	\$ 280	\$ 283	\$ 286	\$ 288	\$ 291	\$ 294	1%
Finance	\$ 450	\$ 455	\$ 459	\$ 464	\$ 468	\$ 473	1%
Technology	\$ 605	\$ 611	\$ 617	\$ 623	\$ 630	\$ 636	1%
Denominational Affairs	\$ -	\$ 50	\$ 50	\$ 55	\$ 55	\$ 60	
Ministerial Relations	\$ -	\$ 50	\$ 50	\$ 55	\$ 55	\$ 60	
Outreach Committee	\$ -	\$ 100	\$ 200	\$ 500	\$ 500	\$ 500	New committee
Nominating	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Total Committee Expenses	\$ 12,570	\$ 13,428	\$ 17,421	\$ 14,521	\$ 14,716	\$ 14,936	
<u>To Reserve Funds (Savings)</u>							
Sabbatical Fund	\$ 1,200	\$ 1,200	\$ - (2)	\$ 1,200	\$ 1,200	\$ 1,200	
Total Expenses	\$ 125,196	\$ 137,070	\$ 149,869	\$ 153,121	\$ 158,576	\$ 164,238	
Net Surplus (Deficit)	\$ -						
Fundraising-Portable Bldg		\$ 60,000					
Loan for Portable Bldg.		\$ 60,000					
Total Investment in Portable Bldg		\$ 120,000					

1) Includes \$7,000 Chalice Lighter Grant

2) Sabbatical year 2006-2007

3) Mortgage payment based on \$60,000 loan @ 6% for 10 years. Payments start Jan. 2006

Page 2 of 2

Membership Focus Appendix A

Scores 1 - 5 (1= low/5=high)
 A- Ability to attract
 B- Impact to congregation
 C- Net financial impact

	What we offer	What they offer us	Impact to congregation	Strategies to target	A	B	C	Total
Young Adults/ wo kids (Gen x'ers 1968-1976)	Young minister, 20's and 30's Social Group, safe environment, Adult RE	Perspective, Future, Social Justice	Low time commitment, Low financial, other worship times may be better, enhanced programming	Could be difficult to entice; programs other than Sunday morning; NE Humanities council programs: more social; music; coffee house; PSA's; ensure website is current. Advertise: area bookstores, pertinent websites, area newspapers, playbills, movie ads, bumper stickers	3	3	2	8
Families w/children - Single or couples - Children < 18	RE, Youth group, other families with children, family social activities, looking for more in life	Vitality, new ideas, expanded social interaction	Space, \$'s, teachers, programming	Parenting programs offered to public, adult events, Adult RE, Small relationship groups, NE Humanities council programs, family events, forums. Advertise: area bookstores, pertinent websites, area newspapers, playbills, movie ads, bumper stickers	3	4	4	11
Empty Nesters (Baby boomers 1945-1964) Single or couples	Other EN's, Adult RE Social Activities	Stability, disposable income, wisdom, life experience	Programming focus, looking for more meaning in life	EN group, programming - life meaning, healthy living, financial planning, adult RE, adult social activities, singles activities. Advertise: area bookstores, pertinent websites, area newspapers, bumper stickers playbills, movie ads	2	3	5	10

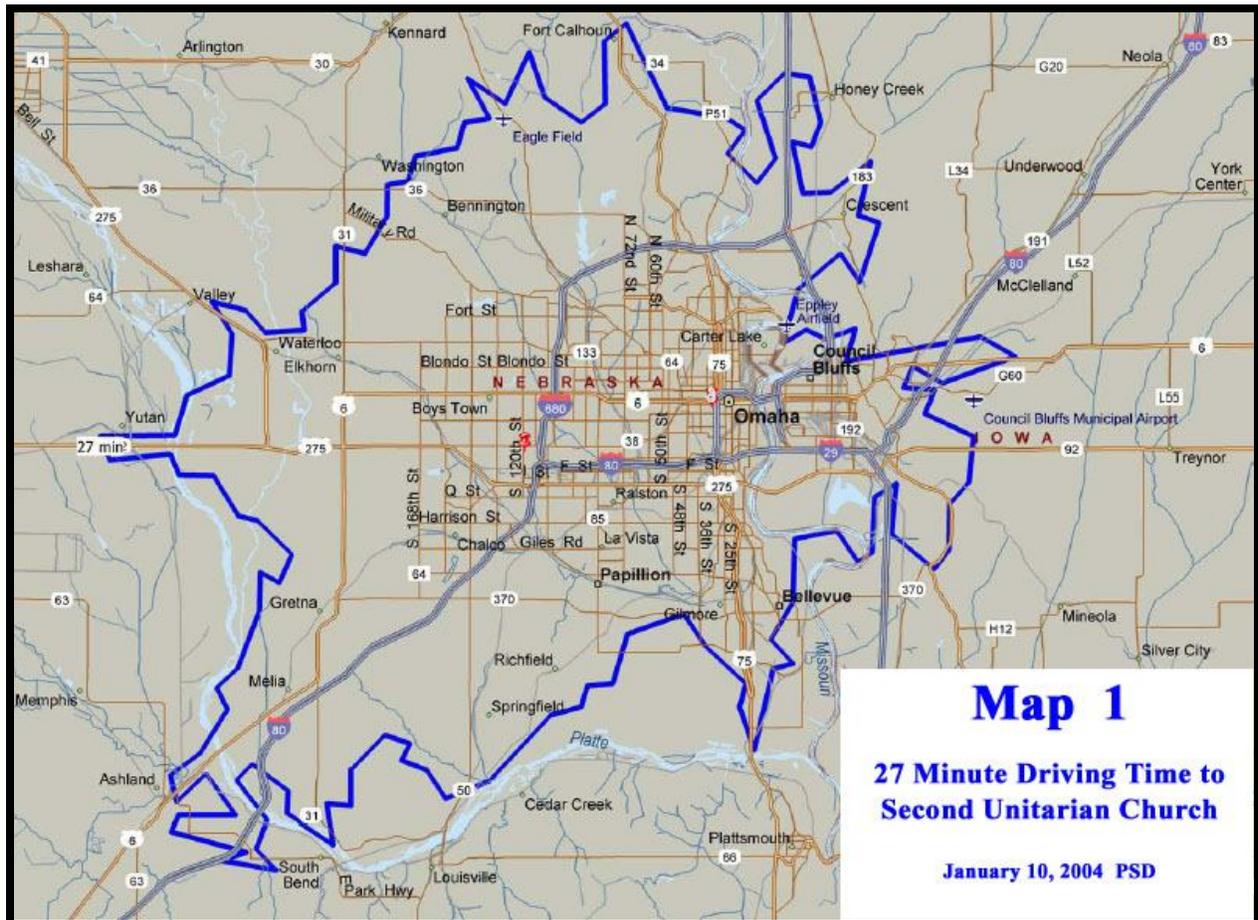
Notes: While we have not targeted specifically to GLBT, each category should ensure marketing as well as programming is inclusive. Also, each category needs to take into consideration that we are welcoming to all faiths and we offer an understanding of different religions, ensuring we are accepting and not offensive.

Appendix B -- Church and Community Demographics

A. Introduction – This analysis made use of readily-available church and community census data. Unlike the 1999 Long Range Plan, a study of the community by religious preference was not made. We recommend that religious preference data for an area within roughly a five-mile radius of the church be made in the near future. The cost of the data would be \$750 to \$1,000.

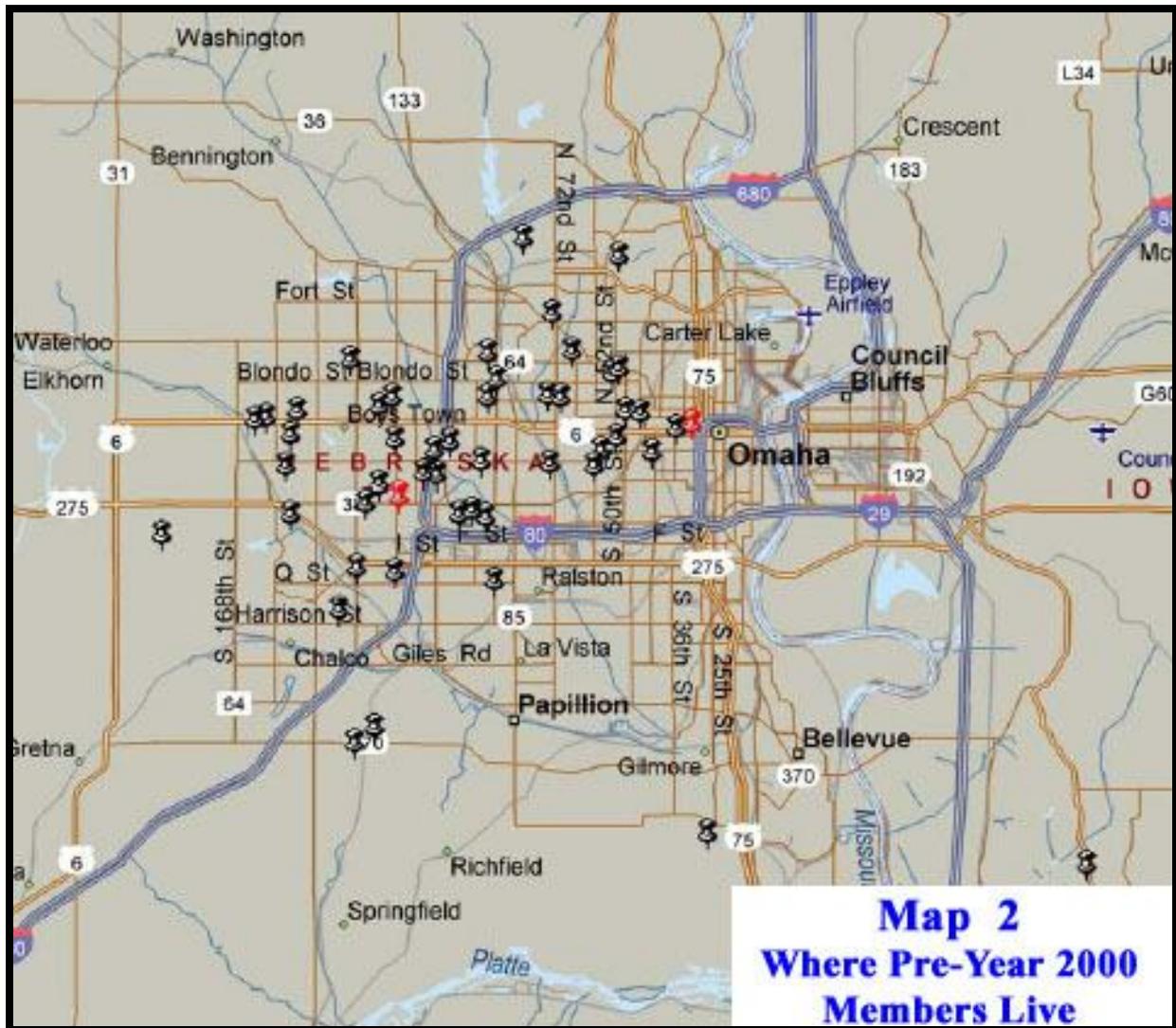
B. Church Demographics

Research says that people will drive 27 minutes to get to church, but if it's more than that, they start to think that it's "too far." Map 1 is a map of Omaha with Second Unitarian as the center of a 27-minute drive zone.

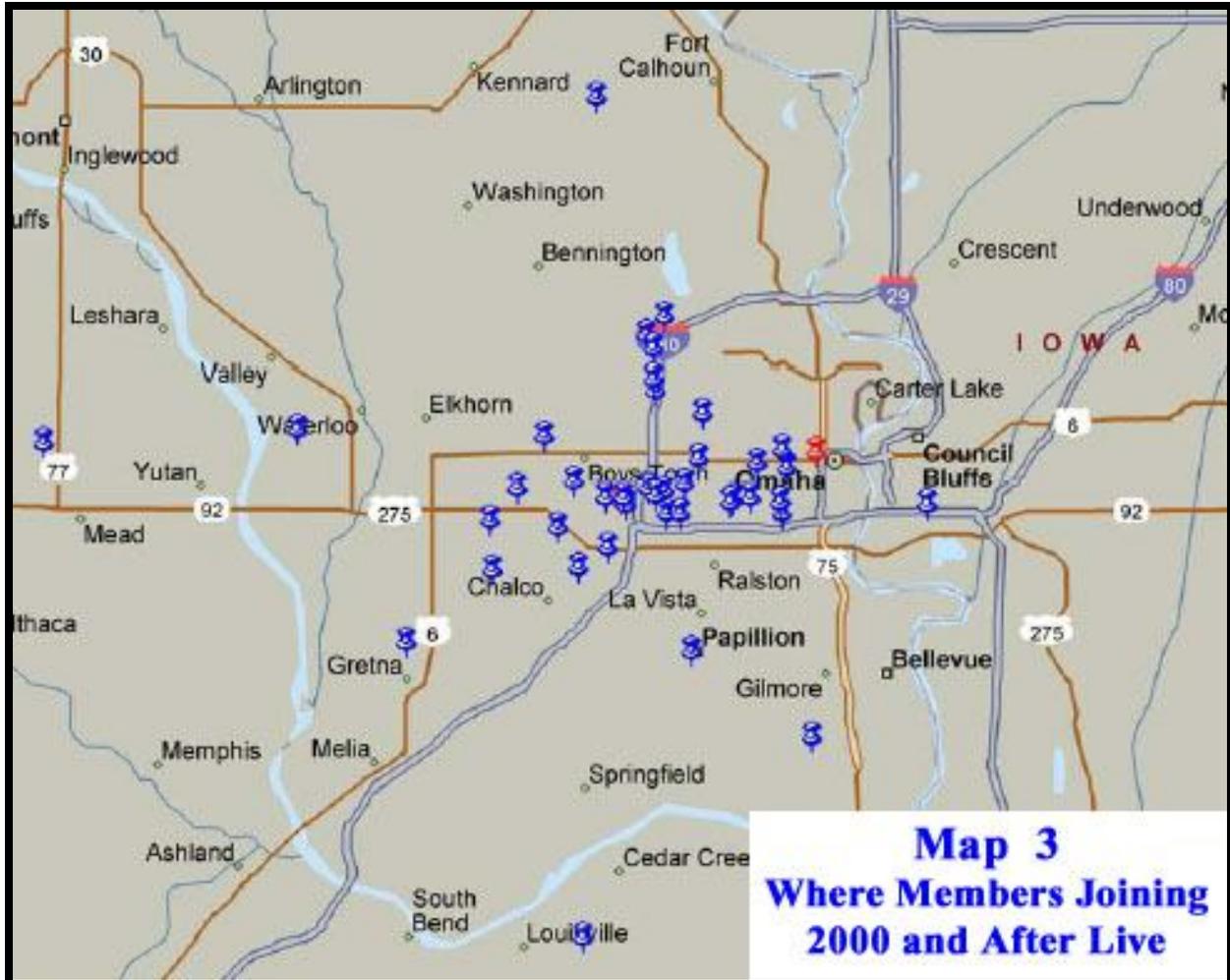


By looking at this map and comparing it to where our members live and where our visitors are coming from, we can get a sense of where the church should put some energy into advertising.

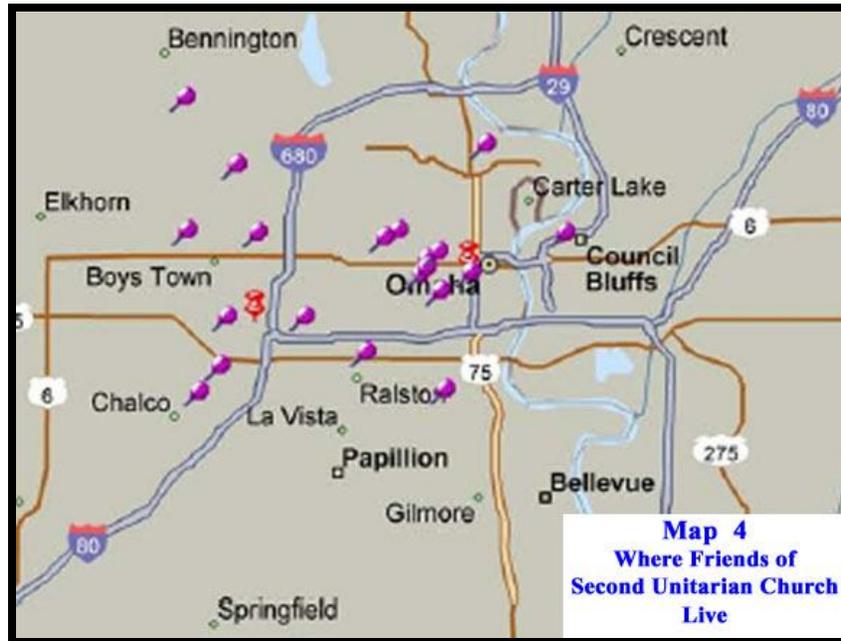
Map 2 shows where the members that joined the church prior to 2000 live. (The year 2000 is when the church changed from lay-led to minister-led.) Excluding those members who live outside the Omaha Metro Area, less than 5% live outside the 27" drive-time area. Note that members are distributed throughout the city including many who live near First Unitarian Church.



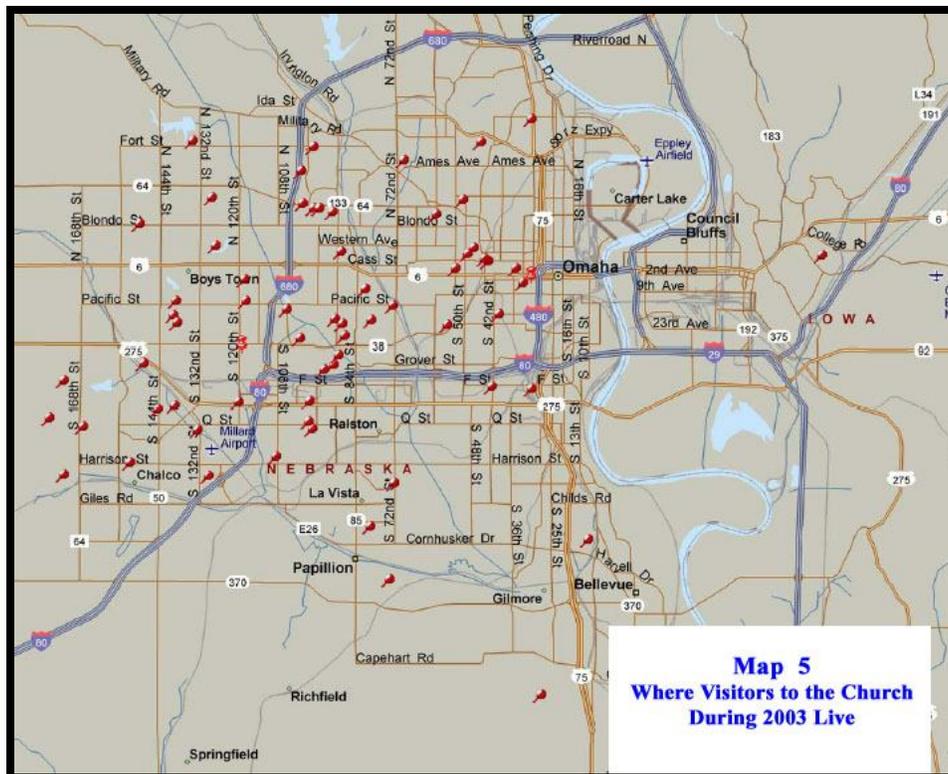
Map 3 shows where members live who joined Second Unitarian after Rev. Josh Snyder arrived. Note that these members are somewhat more scattered, some living as far away as Mead, Blair, and Louisville. Second Unitarian continues to draw new members from the neighborhoods close to First Unitarian indicating these members prefer the programs and/or congregational characteristics over those at First Church and are willing to drive the extra distance.



Map 4 shows where the Friends of Second Unitarian (long-term visitors who have never chosen to join) live. They are also distributed throughout the metro area.



Where do our visitors come from? Map 5 shows where the visitors live who signed our visitor book during 2003. Second Unitarian appears to be attracting visitors from all over the metro area, not just the west side of town.



C. Community Demographics – Omaha Metro Area (Douglas County)

	<u>2000</u>	<u>1990</u>	<u>% Change</u>
Population - Total	463,585	416,444	+11.3
Population – Non-white	88,268		
Population – Hispanic	30,928		
Population – In households	451,878		
Households – Total	182,194	Avg. Household Size = 2.48 people	
Households – Families	115,083	Avg. Family Size = 3.12 people	
Median Family Income	\$50,821		

D. Neighborhood Demographics

Second Unitarian Church is located near the northwestern corner of Census Tract 69.03 – the Prairie Lane neighborhood. This census tract is bordered by Center Street on the north, I-680 on the east, the Union Pacific Railroad on the south, and 120th St. on the west.

Census information about the Prairie Lane neighborhood:

	<u>2000</u>	
Population (2000)	- 2,500	(white – 98%, minorities – 2%)
Families	- 746	
Population in families	- 1,541	
Children	- 531	
Children under 6	- 174	
% children all parents work	- 77%	
1970 Median Family Income	- \$75,528	(2000 dollars) For all Omaha - \$46,339
2000 Median Family Income	- \$62,177	For all Omaha - \$50,821
Change in Median Family Income	-18%	For all Omaha - +10%

Findings:

- During the past 30 years the median family income in our neighborhood dropped 18% in 2000 dollars while the median for the City of Omaha increased by 10%. Two factors responsible: 1) many of the residents retired during that period and are on relatively fixed incomes, and 2) since 1970 apartments have been built allowing lower-income households to move into the neighborhood.
- The neighborhood is aging, and there are many empty nesters. Because of the decline in the number of children in the neighborhood, about a quarter of the students at Prairie Lane School have transferred in from other school districts.

APPENDIX C - CAMPAIGN ASSESSMENT REPORT

ASSESSMENT VISIT REPORT

Name of Congregation: Second Unitarian Church of Omaha
3012 South 119th Street
Omaha, NE 68144
(402) 697.3873
FAX: (402) 334.0537
www.secondunitarianomaha.org

Minister: The Reverend Joshua Snyder
uusnyder@cox.net
(402) 614.1803 (h)
(402) 306.7366 (cell)

Chair, Board of Trustees: Clyde Anderson
7020 Burt Street
Omaha, NE 68132-2600
(402) 932.7225 (h)
(402) 740.5556 (cell)
ClydeLAnderson@cox.net

Contact Person: Cheri Cody Chair, Long Range Planning Committee
710 S. 153rd circle
Omaha, NE 68154
(402) 330.2443 (h)
(402) 393.8225 (o)
(402) 210.9029 (cell)
clcody@juno.com

Number of Members: 124	Number of Pledge Units: 78
Annual Pledge Income: \$95,000	Annual Budget: \$115,073
Average Pledge: \$1,218	Median Pledge: \$780
Mortgage: None	

Amount of Cash Reserves: \$4,987	Endowment: Apparently separate
Reserve Funds:	
Memorials	\$ 6,685
Dodge Fund	10,529
Ministerial Fund	8,384
Building Fund	5,715

Average Attendance—Worship: 70
Average Attendance—Children's RE: 30

Do they conduct a face-to-face Stewardship Campaign? Yes, but it could be improved as many pledges were taken by telephone. The personal canvass will help to build community and should make any decisions about the building easier to make.

Date and Purpose of last Capital Campaign: In the 1970s, First Unitarian Church in Omaha held a capital fund drive to build a new facility in west Omaha. When the drive fell short of its goal, it purchased the property currently occupied by Second Unitarian Church and operated it as a west meeting house. Second Omaha was officially founded in 1976, and the building was donated to it.

Does the congregation have a current Vision and Mission Statement and Strategic Plan? The current Mission Statement is under revision by the Long Range Planning Committee. A workshop will be held on February 24 with an outside facilitator.

Describe proposed project and estimated cost: Primary need is for additional religious education space. If the space currently used by RE is vacated, it can be used to increase the space for social activities and First Hour programming. Additional seating in the sanctuary and additional parking are also on the preliminary list.

What steps have been taken to prepare for this project? The Reverend Charlotte Shivvers, a retired UU minister living in Knoxville, IA, helped the congregation as it was deciding whether to call Reverend Snyder as its permanently settled minister. As a result of the small group work done as a part of that process, the Long Range Planning Committee began work on updating the earlier plan. In the fall of 2003, Reverend Shivvers led a re-covenanting workshop as Reverend Snyder officially began as the settled minister. The new covenant has been adopted, and the Long Range Planning Committee is working on a new Vision and Mission statement.

What did you recommend? Four primary recommendations:

- Give additional emphasis to personal visits in the Stewardship Campaign this spring using the ambassador model of canvassing. Make the goal to canvass for interests and expectations as well as pledges. Adopt a suggested share giving guide to help members and friends determine their financial commitment.
- Complete the strategic plan and present it for approval at the annual meeting of the congregation on May 16, 2004. Include a membership development plan as a part of that work.
- Begin consideration of an alternative site for the congregation as the present facility does not seem to have enough land to accommodate the additional space that appears to be needed. Give special consideration to the purchase of an existing building rather than purchasing land and building new because of cost considerations.
- Plan on having between \$850,000 and \$1,050,000 available for a new facility based on the following assumptions: 1) value of current property is \$250,000; 2) the congregation could borrow as much as \$300,000 and still be within the guidelines for debt service as a proportion of the operating budget; and 3) a capital campaign that raises between \$300,000 to \$500,000 (3 to 5 times current pledges.)

When is a campaign likely to take place? The timing of the capital campaign will depend on the decision about new space. The earliest time is probably the fall of 2005 but it might extend into

2006. Some interim steps may need to be taken at the current site to meet the immediate need for additional religious education space.

Comments about particular consulting needs. The strategic planning process is well designed and building on the past success in planning for full-time ministry. The addition of the membership development plan will make it easier to discern the total facility needs for the next decade.

This congregation will need help with the traditional functions of a capital campaign. It may also need some help in getting the endowment fund and a deferred giving program underway. The Board is working on rules for the fund. However, no major push for deferred giving is planned until the capital campaign schedule is set.

The attached tentative schedule indicates the key events in the process with relative time frames since the timing will depend on locating and controlling a suitable piece of property. It also shows the suggested times for visits by a UUA Congregational Fundraising Consultant

Work Towards Inclusiveness. This congregation is currently in the midst of the Welcoming Congregation Program. In 2003, the entrance to the sanctuary and minister's office was redesigned and is now fully accessible. During our discussions over the three days, the leadership was open to the ideas of inclusiveness and deliberate diversity. They recognized that the membership development plan was an opportunity to work on those issues.

David L. Rickard
UUA Congregational Fundraising Consultant
January 28, 2004

CONGREGATIONAL SURVEY RANKINGS
January 2003 - Long Range Plan

	HOW IS OUR CONGREGATION DOING?	HOW IMPORTANT IS THIS TO ME?
SURVEY QUESTIONS	(5) Strongly Agree (4) Agree (3) Neither Agree or Disagree 2) Disagree (1) Strongly Disagree	(5) Very Important to Me (4) Important to Me 3) Neither Important nor Unimportant (2) Relatively Unimportant to Me (1) Not Important to Me at All
A. Our congregation has a sense of community, caring, warmth, friendliness and supportiveness.	4.37	4.68
B. We attract new participants to our congregation on a regular basis.	3.85	4.48
C. Our congregation warmly and openly welcomes visitors and newcomers.	4.19	4.87
D. Our congregation has good morale: most members have a positive attitude towards church.	4.29	4.62
E. The mission priorities of our congregation are clear and can be described by many members.	3.48	4.03
F. I feel involved in the mission and shared ministry of the congregation.	3.75	4.24
G. Our congregation provides opportunities for an individual's spiritual journey and growth.	4.11	4.44
H. Our congregation's community forums, social justice initiatives, men's and women's groups, and new members classes are varied and worthwhile.	4.27	4.30
I. Our children's religious education program provides a rewarding experience for our children.	4.30	4.53
J. Our congregation values our ministry to its children and families through religious education, and other programs and activities.	4.30	4.46
K. Members of our congregation value youth (Jr-Sr High) ministry.	3.59	4.35
L. Our adult religious education program provides a rewarding experience for our adults.	3.66	4.13

APPENDIX D - SURVEY INSTRUMENT

CONGREGATIONAL SURVEY RANKINGS
January 2003 - Long Range Plan

SURVEY QUESTIONS	HOW IS OUR CONGREGATION DOING?	HOW IMPORTANT IS THIS TO ME?
	(5) Strongly Agree (4) Agree (3) Neither Agree or Disagree (2) Disagree (1) Strongly Disagree	(5) Very Important to Me (4) Important to Me (3) Neither Important nor Unimportant (2) Relatively Unimportant to Me (1) Not Important to Me at All
M. Adult members have opportunities to develop their UU faith and its meaning for them <i>within</i> the congregation.	3.87	4.27
N. I feel comfortable talking about my Unitarian Universalist faith with others <i>outside</i> of the congregation.	3.53	4.02
O. Training and/or support is available to members to help them share their faith and to witness to their faith values.	3.08	3.75
P. Our worship provides the challenge and inspiration we need to live out our faith in the world.	4.15	4.40
Q. The format of the Sunday service is good.	4.31	4.44
R. The overall quality of the music programs for our Sunday services is good.	4.10	4.31
S. Our congregation has an interesting variety of social activities and events for members to get together.	4.08	4.05
T. Our congregation is aware of and involved in local community affairs and issues.	4.25	4.13
U. Our congregation is visible and well-known in its community.	2.66	3.94
V. Our congregation shows a concern for national and international issues.	3.77	4.08
W. Our congregation communicates an awareness and connection to our district and continental UUA.	3.32	3.47
X. The present pledge drive process in our congregation is satisfactory.	3.61	3.98
Y. Our congregation inspires generosity and raises enough money to pay fair compensation and support programs.	3.11	4.27
Z. Our congregation handles capital financial needs well through fundraising, endowment and/or deferred giving.	2.95	3.98
AA. Our facilities are adequate for our staff, our congregation and its needs.	2.20	4.08

APPENDIX D - SURVEY INSTRUMENT (cont.)

CONGREGATIONAL SURVEY

For the following statements, please circle the appropriate number. Your response in the left hand column is your assessment of our congregation. Your response in the right hand column indicates how important this item is to you. The results of this assessment will inform the Long Range Planning Committee in its work.

- (5) Strongly Agree
- (4) Agree
- (3) Neither Agree or Disagree
- (2) Disagree
- (1) Strongly Disagree

- (5) Very Important to Me
- (4) Important to Me
- (3) Neither Important nor Unimportant
- (2) Relatively Unimportant to Me
- (1) Not Important to Me at All

HOW IS OUR CONGREGATION DOING?

HOW IMPORTANT IS THIS TO ME?

5 4 3 2 1	A. Our congregation has a sense of community, caring, warmth, friendliness and supportiveness.	5 4 3 2 1
5 4 3 2 1	B. We attract new participants to our congregation on a regular basis.	5 4 3 2 1
5 4 3 2 1	C. Our congregation warmly and openly welcomes visitors and newcomers.	5 4 3 2 1
5 4 3 2 1	D. Our congregation has good morale: most members have a positive attitude towards church.	5 4 3 2 1
5 4 3 2 1	E. The mission priorities of our congregation are clear and can be described by many members.	5 4 3 2 1
5 4 3 2 1	F. I feel involved in the mission and shared ministry of the congregation.	5 4 3 2 1
5 4 3 2 1	G. Our congregation provides opportunities for an individual's spiritual journey and growth.	5 4 3 2 1
5 4 3 2 1	H. Our congregation's community forums, social justice initiatives, men's and women's groups, and new members classes are varied and worthwhile.	5 4 3 2 1
5 4 3 2 1	I. Our children's religious education program provides a rewarding experience for our children.	5 4 3 2 1
5 4 3 2 1	J. Our congregation values our ministry to its children and families through religious education, and other programs and activities.	5 4 3 2 1
5 4 3 2 1	K. Members of our congregation value youth (Jr-Sr High) ministry.	5 4 3 2 1
5 4 3 2 1	L. Our adult religious education program provides a rewarding experience for our adults.	5 4 3 2 1

HOW IS OUR CONGREGATION DOING?

HOW IMPORTANT IS THIS TO ME?

5 4 3 2 1	M. Adult members have opportunities to develop their UU faith and its meaning for them <i>within</i> the congregation.	5 4 3 2 1
5 4 3 2 1	N. I feel comfortable talking about my Unitarian Universalist faith with others <i>outside</i> of the congregation.	5 4 3 2 1
5 4 3 2 1	O. Training and/or support is available to members to help them share their faith and to witness to their faith values.	5 4 3 2 1
5 4 3 2 1	P. Our worship provides the challenge and inspiration we need to live out our faith in the world.	5 4 3 2 1
5 4 3 2 1	Q. The format of the Sunday service is good.	5 4 3 2 1
5 4 3 2 1	R. The overall quality of the music programs for our Sunday services is good.	5 4 3 2 1
5 4 3 2 1	S. Our congregation has an interesting variety of social activities and events for members to get together.	5 4 3 2 1
5 4 3 2 1	T. Our congregation is aware of and involved in local community affairs and issues.	5 4 3 2 1
5 4 3 2 1	U. Our congregation is visible and well-known in its community.	5 4 3 2 1
5 4 3 2 1	V. Our congregation shows a concern for national and international issues.	5 4 3 2 1
5 4 3 2 1	W. Our congregation communicates an awareness and connection to our district and continental UUA.	5 4 3 2 1
5 4 3 2 1	X. The present pledge drive process in our congregation is satisfactory.	5 4 3 2 1
5 4 3 2 1	Y. Our congregation inspires generosity and raises enough money to pay fair compensation and support programs.	5 4 3 2 1
5 4 3 2 1	Z. Our congregation handles capital financial needs well through fundraising, endowment and/or deferred giving.	5 4 3 2 1
5 4 3 2 1	AA. Our facilities are adequate for our staff, our congregation and its needs.	5 4 3 2 1

AB. My involvement with Second Unitarian would be best described as: (Please check one)

- a) Currently deeply involved
- b) Member, attend service often
- c) Member, relatively inactive
- d) Recent or regular visitor
- e) Inactive member, once deeply involved
- f) Resigned member
- g) Other _____

AC. How long have you been a friend of the congregation? _____ years
 How long have you been a member of the congregation? _____ years

AE. Age and gender of you and your nuclear family:

	Gender	Age (years)									
		≤ 5	6-12	13-17	18-22	23-30	31-40	41-50	51-60	61-70	>70
Self											
Spouse/Significant Other											
Child 1											
Child 2											
Child 3											
Child 4											
Child 5											

AF. In recent years, there has been much discussion about the inadequacy of our current facilities. Describe in your own words what you see as the facility needs of the congregation and what you would recommend as the best way to address these needs.

AG. What additional staffing do you believe will be needed as the church grows?

AH. Facility and staff changes/increases have costs associated with them as well as benefits. Would you be willing to support a capital campaign and/or increase your pledge to support these needs?

AI. If you ranked any item as “1” or “2” in the left column on pages 1 & 2 or have recommendations for other information that should be considered as part of the long range planning process, please explain below:

LONG-RANGE PLANNING COMMITTEE COMMITTEE INTERVIEW QUESTIONS

Interviewer _____

Committee _____

1. Some experts say if your church as been in existence for over 30 years &/or has less than 175 members &lor draws members from more than a mile away from the church, it might be good to center planning around what distinguishes your church. How would you define the niche that Second Unitarian Church fills (if any)?

2. What do you want this church to look like five years from now?

3. What do you believe we do best in ministry today?

4. What do you believe should be our number one point of excellence five years from now?

5. What changes, if any, should be made in our real estate?

6. How do you believe non-members view our church today?

7. How do you want non-members to perceive this congregation five years from now?

Second Unitarian Church Long Range Plan

QUESTIONS FOR SMALL GROUP MEETINGS

1. If you could design the building space for Second Unitarian Church, what would it look like and how many members would it hold?
2. If our congregation were to be more visible in the community, how do you see that taking form?
3. Here is the current mission statement of Second Unitarian Church. Would you add or delete anything in the statement?
4. What makes you feel like you are connected to and living out the mission statement?
5. If you find it difficult to describe what Unitarian Universalism is to others, what information is missing for you when you try to explain your beliefs? *Would you be interested in a series specifically oriented to articulating your UU faith? (?????)*
6. Does the vision you have for the activities of the church mesh with the level of financial support? Is the financial process and its connection to programs presented in an understandable way to you? Does it tie into your sense of the mission?
7. There is a movement in UU congregations for creating lifelong learning programs. How do you envision our religious education programs for children, youth and adults incorporating this lifelong learning?