

Cedars Unitarian Universalist Church

Comprehensive Plan

October 2005

TABLE OF CONTENTS

EXECUTIVE SUMMARY

I. INTRODUCTION

II. THE PAST: CONGREGATIONAL HISTORY

- A. Genesis
- B. The Middle Years
- C. A New Beginning

III. THE PRESENT: AN ERA OF NEW POSSIBILITIES

- A. Ministerial Presence
- B. The Extension Program
- C. Clarifying Congregational Mission And Identity
- D. Organizational Structure And Governance

IV. A LETTER FROM THE FUTURE

V. FIVE YEAR GOALS

- A. Lay and Professional Leadership
- B. Worship
- C. Learning
 - 1. Lifespan Faith Development
 - 2. Adult Programs
- D. Service
- E. Community
- F. Our New Home

VI. FINANCIAL FORECAST

- A. Detailed Financial Forecast
- B. Notes to Financial Forecast

EXECUTIVE SUMMARY

Cedars Unitarian Universalist Church offers a liberal alternative to the religious communities of Bainbridge Island and North Kitsap County. Ever increasing numbers of people seek our message of love and respect for each other and for the earth that is our home. As we grow we will expand our programs and our facilities, and in so doing we will become ever more visible in and accessible to our wider community. This Comprehensive Plan details how we will prepare for and respond to the growth that is sure to come.

This Comprehensive Plan begins with a review of the goals of our year 2000 Long Range Plan, demonstrating that indeed we have accomplished all that we set out to do. Next, the Plan takes us back in time to document our history from our humble beginnings in 1959 to the present. It details how we embraced ministry, and how today we are metamorphosing into a “program church.”

“A Letter From the Future” articulates a vision of CUUC in 2011: a vibrant community anchored in a church home of its own. The Goals section details how we will achieve that vision: In the next five to seven years we will mature in leadership, grow our programs in the four areas of our mission statement – worship, learning, service, community – and build ourselves a new home.

Our goals find concrete support in our detailed financial plan. This plan, and the notes that accompany it, show how we will grow in numbers, how we will support that growth with staff, overhead and programs, and how we will acquire property in 2006-07 on which to build a church home in 2010-11.

In summary, this Comprehensive Plan articulates our dream to be an established, relevant, and permanent presence in our community; and it quantifies the financial commitment that we must be prepared to make in order to realize that dream. By endorsing this Plan, the congregation of Cedars affirms its faith in the future and embraces goals that will extend the reach of its mission and the principles of Unitarian Universalism.

I. INTRODUCTION

In the year 2000 Cedars Unitarian Universalist Church (then known as the Unitarian Universalist Fellowship of Bainbridge Island and North Kitsap or UUFBINK) set out the following goals for our congregation. In 2005, at the end of the five-year planning period, we can report success in meeting, and in some cases exceeding, all of the goals that we set for ourselves.

- **Call a half-time minister:** We have called the Reverend Drew Johnston to be our full-time settled minister.
- **Hire a quarter-time DRE, part-time music director, and part-time bookkeeper:** Our Director of Religious Education, Lisa Ashley, is now half-time rather than quarter-time. We have a part-time, paid music Director, a part-time volunteer bookkeeper, and a part-time volunteer office administrator.
- **Grow our fellowship numerically, organizationally, and spiritually:** Our congregation has grown from 59 members in 2000 to 156 in 2005. We have improved coordination between committees and are developing a new organization structure to facilitate our transition from a pastoral to a program church. And full-time ministry is facilitating the strengthening of the spiritual bonds that we share with each other and that we extend to the wider community.
- **Improve and expand our communications, newsletter, and public relations:** We have streamlined communication between committees and the Board. Our monthly newsletter informs us of important events in the life of the church. Our well designed and maintained website provides up-to-date information including links to our current events calendar, newsletter, UU background information, and contact information. Finally, through the Interfaith Council, we have become a significant participant in the religious life of our wider community.
- **Improve and expand our documentation, processes, procedures, and covenants:** We have an office, a part-time office administrator, a finance audit committee, payroll service, and are becoming more sophisticated in running the business side of our church.
- **Become a Welcoming Congregation:** On January 20, 2002, we approved, by an overwhelming ninety seven percent affirmative vote, a resolution to become a Welcoming Congregation. We are now recognized as a welcoming and safe place for bisexual, gay, lesbian, and transgender people.
- **Expand and grow our social action and social justice endeavors:** Our Social Action committee sponsors or participates in a variety of local, national, and international activities through the Alternative Gift Program,

Super Suppers, Habitat for Humanity, and many other programs. We take monthly special collections to support important programs that help those in need.

- **Increase our average, per-unit pledge:** In 2000 our average per unit pledge was \$562; in 2004 it was \$1231 and in 2005, \$1435. Our per-unit pledging has grown, on average, by over 12 percent per year.

Five years ago, these were pretty ambitious plans for UUFBINK, and yet we met them with enthusiasm and aplomb. Today, as CUUC looks ahead another five years, we have an even more exciting future planned, one characterized by continued rapid growth in membership, expansion of worthwhile and meaningful programs, and a move to larger and more visible space that we can call our own.

Together our past and present have brought us to a point in time where our mission, and our future, are coming into clear focus. As we seek to establish a permanent home our mission will extend over ever increasing circles of community.

II. THE PAST: CONGREGATIONAL HISTORY

A. Genesis

For many years, the fellowship's oral history recalled that the Bainbridge Island newspaper inadvertently used "Unitarians" in the headline above an article announcing possible formation of a Unity group, and that disappointed Unitarians responded by forming a group of their own.

The story is true. The local library has preserved the article in microfilm files of the Bainbridge Review's March 5, 1959 issue. Enriching this creation story, another article announcing a second event fulfilling the earlier but erroneous promise followed on the 23rd of the following month. The articles are nearly identical in form and content: both have "Unitarian" in the headline, both announce the visit of a guest minister at the Winslow Masonic Temple speaking about his or her respective tradition, and both were hosted by local "Mesdames." The names of the Unitarian women who rose to the challenge, along with their spouses and others, were eventually to be found as signatures on bylaws for a new Bainbridge Fellowship. The initial bylaws, dated June 9, 1959, also included a succinct statement of purpose for the new organization: "To study and practice the principles of liberal Unitarianism and to conduct a church school."

Meetings of the new group were held in rented accommodations near the ferry terminal, on the main street of Winslow, and in member homes according to a summary history by charter member Lois Pratt, who remained active or supportive for the rest of her life into the early 1990s. In some years the group met weekly with simultaneous activities for adults and children, in others the children met weekly during after-school hours and the adults met monthly, and sometimes activities were reduced to only the children or only the adults. In 1963 and 1964, the level of activity reached a low-point recorded in correspondence between the fellowship and the UUA's district office in Seattle that discussed possible disbanding of the group. The record is weak (reflecting the organization's fading energy) but the fellowship apparently continued with programs for children before adjusting its nature to suit the needs of a modest membership.

B. The Middle Years

By the 1970s, the Bainbridge Unitarian Fellowship (which also included members from the Kitsap peninsula) had become a 15 to 20-member adult discussion group meeting monthly in member homes on Friday or Saturday evenings, with its presence publicized only by a small advertisement in local "miscellaneous" classifieds. Committed to a continuing presence however,

the fellowship engaged ministerial consultant Jane Raible for periodic assistance with services and Board advice for approximately four visits per year from 1970 through 1973.

Adult discussion programming remained the fellowship's central focus throughout the 1970's, and its membership stayed relatively constant (self-limited perhaps by the average size of member living rooms). To help maintain the denominational identity, guest ministers such as the Rev. Peter Raible from Seattle's University Unitarian Church were invited to visit periodically. Another activity (continuing as a present-day fellowship tradition) was an annual public "Forum" in which the general island and north Kitsap community was invited to hear a distinguished speaker such as University of Washington historian Giovanni Costigan.

During the 1980s, the fellowship alternated between meeting in member homes and meeting in public places such as the Grange Hall, the Seabold Methodist Church and the Winslow Congregational Church. Generally, each move into public meeting space was motivated by the desire to add children's religious education (RE), with Sunday scheduling to better accommodate the expanded program and with afternoon meetings necessary in the shared church facilities. While using the Congregational Church, the fellowship contracted with UU minister Rev. Jim Anderson, who commuted from Olympia for services on a once-a-month basis.

Those who most desired the new children's programming (usually parents) generally assumed leadership responsibility. But demands of the new program also led to burnout, frustration, and departures in that leadership. The viability of the fellowship was tested through several such cycles, with the adult-oriented core persisting as a study and discussion group of 25 or so meeting in private homes. Eventually, as an alternative approach to RE with a broader group of parent friends, Susan and Mark Shaffer organized a non-denominational children's program called SEARCH (for Spiritual Exploration And Reaching Children's Hearts) in the mid 1980s. Although not affiliated with the fellowship, the Board supported this program with RE curriculum materials. The program served 20-25 families and remained active until 1990.

C. A New Beginning

In the early 1990s, the fellowship resolved to try a more open meeting format for its adult programming and began meeting once a month in the Winslow Senior Center where attendance averaged "in the 20s" (June 1991 newsletter). The meetings were moved to a room in the new Sterling Savings

Building in late 1992, and a new twice-monthly Sunday morning inter-generational program was initiated a year later using the Country Montessori School near Battle Point Park as a meeting place. Saturday evening programs continued in the Sterling Building once a month, and were moved back to the newly renovated and more accessible Senior Center in September of 1994.

When 49 adults and 44 children attended a Sunday program in September of 1995, it was time to move again. Membership had tripled in just a few years, and larger facilities were necessary. The search for better space discovered a unique opportunity in the island's Hyla School, a new private middle school at the historic Bucklin Hill Farm. The move provided access to a large assembly room (seating up to about 140) for services and adult programming as well as a variety of nearby classroom spaces for religious education. Thriving in these accommodations, the fellowship has continued to grow and has become more diversified in age and lifestyle. There has been a significant increase in the membership percentage of long-time or transplanted UUs with deeply held commitments to denominational values.

The fellowship was deeply transformed by its success in the Sunday morning service format and children's RE, and that success was the clear result of dedicated and visionary commitment by the Board, worship and RE committees, and lay leadership for the services and RE classes. Looking toward the future, the Rev. Barbara Wells was invited to lead an all-day workshop capturing a sense of the fellowship's history and producing an initial congregational mission statement in early 1996. In 1998 the fellowship began a several-year process of moving toward professional leadership, and a 1999 survey identified many of the qualities desired in a minister and determined that there was much support for half-time consulting ministry.

III. THE PRESENT: AN ERA OF NEW POSSIBILITIES

A. Ministerial Presence

The fellowship's long history as a lay-led organization left a deeply embedded legacy of group independence and self-sufficiency. Ministerial presence and support was invited or arranged on an as-needed basis for almost forty years, providing guest speakers, board advice, and special services for memorials and weddings, but organizational leadership and development remained the responsibility of fellowship members and their elected officers.

The 1990s brought significant change with success in children's religious education and accompanying growth in membership. The fellowship began

offering more program variety and meeting more often, and it began to attract individuals with rich experience in UU congregations elsewhere. Recognizing its need for more effective organization and planning, the growing fellowship asked the UU Pacific Northwest District for assistance, conducted elaborate member surveys exploring congregational aspirations, set goals for accomplishing some of them, and initiated the search for a part-time minister.

Membership had grown from 30 in 1995 to 68 in 1998 when the fellowship began exploring the possibility of hiring of its first minister, and had reached 88 at the time of its first ministerial search process in 2000.

Rick Koyle began service as the fellowship's half-time consulting minister in the fall of 2000, and his arrival brought new energy, more members, and moved the fellowship into a significant new stage of development. He was the fellowship's first minister, this was his first congregation, and there was much learning to do. The fellowship began to develop a deeper appreciation of its denominational and institutional identity as it adjusted to the presence of professional leadership. Some change was difficult, as self-sufficiency and independence gave way to shared leadership, but this was accompanied by a dawning comprehension of the fellowship's potential for a rich and more significant future. Between January and December of 2001, the fellowship gained 18 new members, reaching a total of 106 and identified as the second-fastest growing congregation in the Pacific Northwest District.

B. The Extension Program

In the second year of its new experience with a minister, the congregation added Leif Oden as a quarter-time religious education coordinator. It also began evaluating various alternatives for moving to full-time ministry, concluding with a formal application to the Unitarian Universalist Association's Extension Program. That program would provide a specially trained full-time minister with subsidies to defray some of the costs, be growth-oriented, and extend over three years. The Fellowship's acceptance into the program brought excitement that was soon tempered by an unforeseen dearth of suitable candidates. The UUA elected to name a one-year interim minister while continuing the search for its final ministerial candidate.

Thus the fellowship was deeply honored by the interim selection of the Reverend Dr. Peter Raible, distinguished minister emeritus of University Unitarian Church in Seattle and familiar with the fellowship through guest minister visitations and support over many years. The fellowship was also

given an additional subsidy to support a half-time role as director of religious education for Leif Oden.

Peter arrived in the fall of 2002 and immediately began working with Board and committee leadership, sharing experience and offering insightful advice from a notable lifetime in ministerial service. Within a few months, however, he suffered health changes limiting his engagement and support. Ministerial student Jeanne Pupke was appointed to serve as an intern with him, providing assistance while gaining required experience. Together, they significantly deepened the fellowship's experience with ministerial presence and leadership. Jeanne also allowed the fellowship to recognize and appreciate its responsibility, and opportunity, as an important source of experience and teaching in her ministerial training, so that learning was shared and each gained much from the other.

In May of 2003, the Extension Program office announced that the Rev. Andrew (Drew) Johnston had been selected as the extension minister candidate. In order to introduce him to the fellowship, an activity-filled weekend was organized to include a supper with Board and committee chairs, a potluck dinner with the general membership (later described as "speed-dating" because of his need to visit eight or nine tables in an hour or so), and the Sunday morning service after which he was immediately invited to become the fellowship's extension minister.

With Drew came a new sense of arrival, and recognition that the fellowship was moving dramatically forward in its development. Lisa Ashley was named to fill the newly vacant director of religious education role, and the RE program reached a new enrollment high of 60 by the end of the church year and then climbed to 85 during the next year. The fellowship began offering two services in order to increase Sunday seating capacity and broaden its accessibility, and membership reached a new high of 127 by the end of the year and grew to more than 150 in the next year as it became increasingly clear that the congregation would soon need larger facilities.

C. Clarifying Congregational Mission and Identity

In November of 2003 a congregational workshop was scheduled to begin the development of a new mission statement, a reinvigorating process that would stimulate soul-searching discussion of Unitarian Universalist principles and congregational values and desire over the course of several months. The workshop produced a series of tentative statements for further consideration, and a few weeks later the Trustees charged a special task force with the task of distilling the workshop energy and thinking into a concise and memorable

statement of congregational purpose.

The overall process used to produce the final statement was later described as tracing keywords and groups of words in and out of the workshop proposals to discover core concepts of "love", "teach", "learn", "community", "fairness", and "spiritual", producing a number of tentative new statements embracing the range of concepts, gathering and processing member feedback on those tentative statements, creating a preamble as an explanatory background and context for the statement, and finalizing the statement in the relatively succinct and expressive form that was enthusiastically approved by the congregation in a special meeting held in February of 2004:

Because Unitarian Universalism embodies a rich tradition of liberal religious values that recognize the inherent worth and dignity of every person and the interdependence of all life; and

Because nearly 50 years ago a few searching souls chose to live those values by planting the Unitarian Universalist seed on Bainbridge Island; and

Because in coming together those souls sought a sense of continuity, cohesiveness and community; and

Because that seed has grown into a vibrant, welcoming Congregation in which we support each other through Worship, Religious Education, and Social Action; and

Because the roots of our Congregation have developed the strength not only to offer spiritual sustenance and support within, but also to nourish those who want in the wider world;

Our Mission is to:

Worship with open hearts

Nurture a learning spirit

Serve justice with compassion

Love without judgment

Inspired by the new statement and its development process, the congregation immediately began discussing the possibility of assuming a new name to express the growing sense of who and what it was becoming.

Assigned to a new task force, this next effort began in May with a special town meeting facilitated by new Pacific Northwest District UUA Executive

Janine Larson. Attendees shared opinions about what should be considered in a new name and there was much member support for brevity and simplicity. Other desired qualities were that it express geographic inclusiveness, be unique and true to our faith, reflect progressive values, have longevity, and achieve a less awkward acronym than UUFBINK.

Janine suggested that a typical name might contain four elements: a local identifier (the "Bainbridge Island and North Kitsap" part of the fellowship's name), a denominational identifier ("Unitarian Universalist"), an organizational identifier ("Fellowship"), and the overall effect of the name — its length, acronym, sound, even the feeling that it inspires.

For a new name, the continued use of both UU identifiers was found to be preferred. The organizational identifier was noted as a likely area of contention after investigating various ways in which religious communities identify themselves, and Church and Fellowship were found to have the strongest support. Many possibilities for the local identifier were proposed and evaluated after noting that this might typically reflect a geographic element or a natural feature, speak of a particular value, name a historic contributor to the faith, and/or be a tribute to an individual who had significant impact on the congregation.

Over the next month or so, members were surveyed for reaction to the meeting findings, and promising new name possibilities were identified and discussed at length in a second meeting where a preference for Church as the organizational identifier was also expressed. New name candidates were then shared with as many members as possible in an informal poll. Many of those responding, however, chose to allocate votes to write-in candidates, and Cedars Church emerged as a new contender associated with the natural beauty and environmental values of the northwest as well as with local Native American mythology and culture.

With significantly more discussion and growing support, the Unitarian Universalist Fellowship of Bainbridge Island and North Kitsap was renamed Cedars Unitarian Universalist Church in a special congregational meeting on January 9, 2005.

The next few months were filled with an active and comprehensive evaluation of the congregation's relationship with its Extension Program minister. Concluding that process in May, the congregation enthusiastically voted to call Reverend Drew as its first settled minister. Accepting with equal enthusiasm, Drew will consequently now remain as Cedars' permanent minister.

In the summer of 2005, following its search for larger accommodations to support its growing size, the congregation bid fond farewell to Hyla School and moved to the Playhouse facility of Bainbridge Island Performing Arts. Located at the heart of the island's active Winslow community within a few blocks' walk of surrounding residential neighborhoods and the Seattle ferry, this facility provides two hundred fifty seats in its main assembly space, a sociable lobby with adjoining pantry, and several classrooms (with plans for adding several more in the immediate future). Additionally, convenient new office space was then found in the nearby Sterling Savings Building (where the church itself had met for several years in the early 1990s).

D. Organizational Structure and Governance

The fellowship's original organizational structure and governance was very simple. The initial (1959) bylaws identified officer roles of Chairman, Secretary/Treasurer and Church School Director, and established a fellowship Executive Committee composed of the officers and the naming of a nominating committee one month prior to an annual election of officers. This modest structure served the fellowship through several decades of slow but positive growth and change. As the fellowship grew, additional committees were formed to address special needs such as programs, hospitality, and publicity. The executive committee became the Board and was expanded to include committee chairs, gradually growing in size as new offices or committees were added.

New committees were created as new needs were acknowledged, facilitating a coincidental efficiency since committees were formed only as needed. But as the number of committees and committee chairs began to increase more rapidly (from five committees in 1994, to nine in 1998, and to fifteen or so in 2004), the fellowship's simple governance structure began to exhibit signs of stress.

A significant change was made in 1999, when Board and committee roles were separated and the Board was redefined to be the fellowship officers of President, Vice-President, Secretary, and Treasurer, accompanied by three additional members-at-large. As a response to increasingly unwieldy board size, the change was intended to restore efficiency in governance. Board and committee coordination became less direct however, with liaison relationships between individual committees and Board members providing the basis for board-level coordination, and with committee-to-committee coordination left to occur informally when needed.

In 2002, at the initiative of then-president Nancy Evans-Jones, periodic

coordination of all committee chairs was formalized in a new coordinating council. Meeting on a bi-monthly or quarterly basis, and in relatively unstructured form, this council's membership was eventually narrowed to those committees clearly needing or benefiting from familiarity with the others' activities.

Committees have always represented a significant part of the fellowship's organizational structure, but the fundamental nature of committees and the process for creating them has been informal and inconsistent. A new committee might form almost voluntarily from the simple suggestion of a perceived need or be formed as a more deliberate action by the Board, but until very recently there was no formal policy or clarity about when or why committees should be formed. General practice has tended to distinguish between committees and taskforces on the basis of duration, with the former persisting over time and the latter forming to accomplish a designated task and then disbanding. The term "standing committee" has been sometimes used to suggest a particularly permanent or significant committee, but without bylaw support for making or understanding that distinction. Additionally, some committees carry nearly total responsibility for significant areas of fellowship activity while others are closely focused on very specific and sometimes-modest fellowship needs.

In 2003, the Board began discussing new models of governance and the planning committee began studying the fellowship's organizational structure in parallel efforts intended to identify and recommend changes that could bring structural and operational aspects of the organization into better alignment with its changing needs. The planning committee began to study whether committees covered the full range of fellowship needs and whether there might be more committees than necessary. The Board began to study approaches to fellowship governance that would focus it on overall policy guidance rather than direct oversight and engagement in committee activities.

At the beginning of the 2004-05 church year, responding to the insights and recommendations of these studies was identified as a board priority and assigned to a new subcommittee formed specifically for this purpose. After further study (and the assumption of a new church name), the subcommittee identified basic principles to guide its further effort:

- The primary activities of Cedars UU Church should be mission-based and self-guided.
- Organizationally, Cedars UU Church should be regarded as an organic

and living entity rather than a mechanical assembly.

- The organizational structure and governance of Cedars UU Church should be empowering rather than controlling.
- The leadership of Cedars UU Church should seek to foster vitality rather than performance.

A conceptual proposal was then developed for a new governance model and an accompanying organizational structure. The proposal suggested distinct levels of organization and responsibility, suggested a basis for ensuring mission coverage while minimizing the number of standing committees, and suggested that each standing committee would oversee subcommittees and taskforce elements. The new model clarifies roles and assigns responsibilities, so that the Board will be responsible for policy oversight and allocation of resources, "action" committees and the coordinating council will be responsible for mission implementation (with active help from subcommittees and taskforces), the minister and staff will provide advice and inspiration, and support committees will provide specialized assistance at each level of governance (with further subcommittee and taskforce support as needed).

The proposal was presented to the Board in March of 2005 and to the coordinating council in the following month. With minor revisions responding to comments made in those leadership presentations, the proposal (as reproduced on the following pages of this document) was then shared with the general congregation at its Annual Meeting in June, where it was noted that the next step would test the practicality of its conceptual approach and organizational implications in a corresponding revision of the bylaws.

CEDARS UNITARIAN UNIVERSALIST CHURCH

Proposed Levels of Function & Governance

| | <i>Function</i> | <i>Organizational Element</i> | |
|------------|---|--|------------|
| IV | <i>Mission Empowerment & Policy Oversight</i> | <i>Board of Trustees</i> | IV |
| III | <i>Mission Implementation & Guidance</i> | <i>Minister, Staff, Council, & Standing Committees</i> | III |
| II | <i>Small Group & Support Activity</i> | <i>Subcommittees, Taskforces, Covenant & Affinity Groups</i> | II |
| I | <i>Committed Participation</i> | <i>Members, Member Families, & Friends</i> | I |
| | <i>Potential Participation or Collaboration</i> | <i>Local Community Friends & Sympathizers</i> | |

Background Audience of Observers

Service Area/Local Community Population

Assumptions

Cedars UU Church is in a significant stage of transformation and growth that has been noted as difficult to achieve without crisis. It is approaching the size and character of an organizational entity commonly identified as a "Program Church", a group centered as opposed to clergy centered organization, and demanding a clearer and more coherent form of organizational structure and governance.

The proposed levels of function suggest that "governance" functions are associated with particular degrees of organization, primarily with levels III and IV (but supported or validated by the activities of subcommittees and taskforces of level II and democratic processes engaging the general membership at level I).

Current practice is not radically different, except that the difference in function between levels III and IV is vague, and the distinction between levels II and III is very weak.

CEDARS UNITARIAN UNIVERSALIST CHURCH

Proposed Mission Coverage



CEDARS UNITARIAN UNIVERSALIST CHURCH

Proposed Organizational Structure & Governance Model

Mission:

**Worship
with
Open
Hearts**

**Nurture
a
Learning
Spirit**

**Serve
Justice
with
Compassion**

**Love
without
Judgment**

Support Committees

PLANNING

NOMINATING

ENDOWMENT

FINANCE

Capital
Campaign

Stewardship

Mission Empowerment & Policy Oversight

BOARD OF TRUSTEES

Mission Guidance & Implementation

MINISTERIAL STAFF

C. O. S. M.

COORDINATING COUNCIL

OPERATIONS

Action Committees

WORSHIP &
CELEBRATION

ADULT
PROGRAMS
RELIGIOUS
EDUCATION

SOCIAL
ACTION

MEMBERSHIP

Subcommittee & Taskforce Team Activity

Worship
Associates

Children's
R. E.

Local Projects

Outreach

Communica-
tions

Choir

Youth R. E.

Alternative
Gifts Prog.

Pastoral Care

Set-Up/Down
Support

Aesthetics

Adult R. E.

UUA Social
Witness Prog.

Rainbow
Reserves

Sound Syst.
Support

Forums &
Study Circles

Circle
Suppers

Hospitality
Support

Covenant
Groups

CEDARS UNITARIAN UNIVERSALIST CHURCH

Proposed Organizational Structure & Governance Model

The new organizational structure and governance model suggested by this proposal may not appear to be radically different from current practice, but the principles behind the model may be significantly so. Cedars UU Church is transitioning from pastoral to program size and this suggests a different form of governance. Responding to that need, and reflecting change at board and coordinating council level that has already begun moving in this new direction, the proposal is for an empowering rather than control-oriented structure and consequently does not emphasize reporting linkages as in a chain of command. It is intentionally dynamic and self-regulating, with primary responsibility for action delegated to those performing the action, guided by framing principles of the congregational mission statement(s) and within operational limits set by the board.

The proposed model tries to be efficient by providing a minimal number of elements organized in levels defined by differentiated functions. The levels distribute responsibility for governance and action with as little administrative overhead as possible. The highest level of governance provides functional guidance and empowerment of the whole through policy definition, resource allocation, and leadership recruitment or nominations of the board. At midlevel is a multi-layered zone of mission guidance and implementation, with the minister and staff enriching the overall organization as advisory and inspirational resources, the council coordinating and facilitating action across the full spectrum of the congregational mission, and mission-based action or standing committees addressing or expressing portions of that mission for which they are responsible. Below the committees, clustered and coordinated as subordinate to them, is the level of subcommittees and taskforce elements working to accomplish the work of the church and welcoming broad participation by the general membership.

The action committees will hold primary responsibility for mission implementing activity, with the council providing a vehicle for coordinating individual committee activities with each other and for general support and collaboration as might be appropriate. The committees and the coordinating council are integrally interrelated and linked to the board because council membership is composed of the action committee chairs along with the vice president of the board. The council consequently also serves as an information-sharing conduit between committees (and their subcommittees and taskforce affiliates) and the board.

IV. A LETTER FROM THE FUTURE

July 3, 2011

Dear *Cedars Unitarian Universalist Church in 2005*:

Greetings from *CUUC in 2011*! We have just opened the doors of our brand new building. Centrally located on Bainbridge Island, our new home is an eloquent expression of who we are and what we do: it is inviting, comfortable, functional, and supportive of all the different ways we worship, learn, serve justice, and love each other and our wider community. Our church is easy to find and convenient to get to from just about anywhere. There is ample parking and the building entry is welcoming to all, including those with disabilities. Being highly visible and equally accessible to the Bainbridge Island and North Kitsap communities, our building extends our welcome to all who are looking for a liberal religious experience.

In 2011, CUUC is a growing community of over 300 pledging members, 100 friends, and 170 children and youth, nearly all of who regularly attend one of our two worship services each Sunday. Our worship space is ample and uplifting, though not overdone. Since our building is "ours" we are finally freed from "church in a box."

Under the guidance of our called minister, the Reverend Drew Johnston, assisted by our intern minister and a whole host of volunteer Worship Assistants and Coordinators, our worship services are an eclectic mix of traditional ritual and homegrown celebration—once in a great while it doesn't quite work but the experience is always uplifting, provocative, and fun.

Our choir and accompanist, very capably facilitated by our music director, add the musical touch to our worship experience. They are able to sound so good because they have their own choir room where they practice regularly and where they can warm up their vocal cords before each service. And since we don't have to roll the piano around every Sunday, it stays in tune longer!

A vital element of our Sunday worship is the welcome that we extend to our guests. Not only do we acknowledge and welcome them during the service, we also invite them to linger for social hour afterwards, when we can get to know each other a little. We gravitate to the multipurpose room with adjacent commercial-grade kitchen from which we serve coffee, tea and goodies. Our guests find our warm welcome genuine and irresistible and many return again and again, eventually to become members.

At Cedars we nurture a learning spirit in many ways: through our Lifespan Faith Development Program, which promotes the religious growth of children, youth, and adults, and fosters the religious life of families and communities. Another way we promote learning is through our Adult Programs, which bring us information and experiences on a wide range of interesting and relevant

topics. And we also sponsor a ministerial intern-training program, which brings us new ministerial candidates each year to teach us and learn from us through one-year internships.

Our building supports all this learning with a classroom wing sufficient for our large and growing population of children and youth – 170 at last count! This wing contains separate rooms for childcare, four grade levels of children’s classes, two youth age groups, an RE library, and an office for our full-time Director of Lifespan Learning and part time assistant DLL. In the evenings the classrooms are used for adult education programs. One room is large enough to conduct all-ages, intergenerational worship at the same time the “grown-up” worship service is happening in the main sanctuary.

Cedars Unitarian Universalist Church is recognized in our community as a group that is concerned with and engaged in the betterment of life for those in need. We serve justice with compassion by providing a comprehensive range of social services either as a direct sponsor, or as host to other providers in our community. For example, we support an expanded Super Suppers program with our commercial-grade kitchen adjacent to a large multipurpose room. We also welcome other community groups to hold their own meetings, workshops, and activities here. Cedars is a reliable partner in the faith-based community: we can be counted on when our community needs us. And because of our demonstrated commitment in time, resources, and the availability of our facility, we find that many social-action-minded people seek us out to participate and do even more.

In our religious community here at Cedars, we accept one another as we are and we enjoy being together. This is an expression of our love without judgment, and we demonstrate it frequently at potlucks, parties, and social hour after Sunday services. Another expression of our love for each other is the tremendous amount of volunteer work that is donated to run our Church. The Board of Trustees, the Coordinating Council, the committees, the Worship Associates and RE teachers, the volunteers who bring the Sunday goodies or serve the Super Suppers and clean up afterwards, all give tremendously of their time and energy to make good things happen. Our building supports all their loving work with ample office and meeting space, the multipurpose room and kitchen, and plenty of parking.

And so *CUUC in 2011* is an active presence and a positive force in our community. We are a vibrant, open, welcoming congregation that actively and passionately worships with open hearts, nurtures a learning spirit, serves justice with compassion, and loves without judgment.

Keep the future in sight, dear *CUUC in 2005*; it’s coming and we want you to be ready!

Yours in Hope,
Cedars Unitarian Universalist Church in 2011

V. FIVE YEAR GOALS

As Cedars Unitarian Universalist Church steps forward into our future, we seek to deliver the promise of our mission statement effectively and intentionally. We have set goals to help us accomplish this.

In this section of the Comprehensive Plan, our five-year goals are presented in a logical sequence that begins with Leadership. Next, we focus on the goals of the four mission elements: Worship, Learning, Service, and Community. Finally, and with great excitement, we look at goals for achieving our dream of a new church home.

Five-Year Goals:

A. Lay and Professional Leadership

1. Board of Trustees
2. Minister and Staff
3. Coordinating Council

B. Worship

C. Learning

1. Lifespan Faith Development
2. Adult Programs

D. Service

E. Community

F. Our New Home

FIVE YEAR GOALS

A. Lay and Professional Leadership

As described elsewhere in this Comprehensive Plan, CUUC is transitioning to a new organizational structure and governance model. The new model distinguishes between the comprehensive oversight of the Board of Trustees and the action-oriented leadership of standing committees in each of the congregational mission statement's core focal areas: worship, learning, service, and community. It also identifies the minister and staff as advisory and inspirational resources in congregational governance in addition to their professional leadership in spiritual and program aspects of congregational mission and activity.

These coming changes and the dynamic nature of the Congregation as a whole makes nearly impossible the assigning of leadership goals to specific leadership groups. Too many goals will be shared or will overlap. Instead, our organization can best be served grouping its leadership goals by function rather than by the person or entity that might be involved in the accomplishment of the goals.

Specific Leadership Goals of the Congregation

1. Goals Concerning Paid Professional and Administrative Employees
 - Pay the minister and all professional and administrative staff based on the UUA's fair compensation guidelines.
 - Increase the paid professional and administrative staff.
 - Formalize minister and staff employment relationships with agreements that recognize the special nature of each position.
 - Create goal setting and evaluation processes pursuant to which all paid professional and administrative staff set goals at the beginning of each church year and are annually reviewed (at least) both in general and against the goals thus set.
 - Create opportunities for intern ministers to learn with and from us.
2. Goals Concerning the Financial Health of the Congregation
 - Establish a process for year-to-year continuity in planning and conducting the stewardship campaign.
 - Ensure that internal and/or external audits of the Church's finances are performed at least annually.
 - Take steps likely to increase per-unit pledging to levels appropriate for our community and necessary for the continued development of the Congregation.

3. Goals Concerning the Structure of and Communications within the Congregation
 - Restructure the Congregation along the lines outlined in Section III.D, above. Revise the by-laws such that the Board assumes greater oversight and policy-making functions and leaves to the committees the day-to-day operations of the Congregation.
 - Assemble a Policy Manual including all policies established or approved by the Board.
 - Facilitate communication among the committee chairs and between committee chairs and the Board of Trustees.
 - Identify opportunities for coordination of committee programs and for sharing resources.

4. Goals Concerning Relations within the Congregation
 - Develop an effective pastoral care program.
 - Improve the Congregation's understanding of the Committee on Shared Ministry (CoSM).
 - Improve the Quality of Relationships within the Congregation.
 - Encourage the Continued Development of the Covenant Group Program.

5. Goals Concerning the Congregation's Relationship with the Larger Community
 - Increase denominational understanding and participation by the congregation and its members.
 - Promote congregational growth.
 - Strive for more active sharing of UU values in the wider community.

Goal Descriptions

1. Goals Concerning Paid Professional and Administrative Employees

The old five-year plan focused on Cedars' taking the steps necessary to call a minister and hire a professional DRE. We have done both and so now our focus must turn to increasing the size of our staff to levels appropriate for our Congregation and to formalizing and professionalizing the Congregation's relationships with its paid professional and administrative staff.

Pay the minister and all professional and administrative staff based on the UUA's fair compensation guidelines.

The Board has established a goal of compensating the minister and staff in accordance with the UUA Fair Compensation Guidelines. Specifically, our compensation target is the mid-range of Geo Index 5, Mid Sized 1 Congregation by the beginning of church year 2008-09. Thereafter, we will continue to base compensation on the guidelines as our Congregation grows.

Increase the paid professional and administrative staff over the next five years.

Increase DRE to full-time status and add part-time Assistant DRE as detailed in the Learning section of this plan and the Financial Forecast and Notes.

Add separate choir/music director and accompanist staff positions as detailed in the Worship section of this plan and the Financial Forecast and Notes.

Add paid staff position(s) for office administration and bookkeeping.

Formalize minister and staff employment relationships with agreements that recognize the special nature of each position.

The minister and other professional staff are entitled to written agreements that recognize the professional nature of our relationship with them. The agreements will set out the expectations of the Congregation with respect to the jobs in question and will outline the professionals' and the Congregation's obligations to each other. The contracts and related job descriptions will be reviewed annually to ensure alignment with Congregational needs, UUA compensation guidelines, and professional development.

All paid professional and administrative staff should be asked to set goals at the beginning of each church year and should be reviewed at least annually in general and against the goals set.

Essential to any professional and employment relationship is the opportunity to set goals and to assess performance against those goals and against other, more subjective criteria. Although the nature of the relationship between a Congregation and its called minister is unique, it still can benefit from everyone's having an understanding of how the minister's performance can and should be evaluated. Likewise the other paid positions in the Congregation.

As a result, the Congregation will establish a process by which its professional and administrative staff will set goals and will be formally evaluated on at least an annual basis. Of course, the formal process cannot and should not be understood to replace the informal evaluative nature of all healthy relationships.

Create opportunities for intern ministers to learn with and from us.

We will create and fund a paid ministerial internship program as detailed in the Worship section of this plan and the Financial Forecast and Notes.

2. Goals Concerning the Financial Health of the Congregation.

The Congregation can achieve its medium- and long-term goals only if it is financial stable. To be sure, the goals outlined in this plan – most notably the acquisition of land and construction of a building – will require that we take some financial risks and some financial leaps of faith. But those risks must not be used to justify unnecessary extravagance in our operations, and they will demand that we are efficient and effective in our fundraising.

Establish a process for year-to-year continuity in planning and conducting the stewardship campaign.

Define annual stewardship goals within the context of multi-year financial planning and use the Finance Committee for oversight and year-to-year coordination. The process should include outreach to encourage friends to become more involved, either as members or pledging friends.

Perform internal and/or external audits of the Church's finances at least annually.

Proper audits must be undertaken to ensure not only that the Church books and records are accurate and adequate, but also that the Church has systems and controls to ensure its financial viability into the future.

Take steps likely to increase per-unit pledging to levels appropriate for our community and necessary for the continued development of the Congregation.

Our ability to engage leadership, find and furnish appropriate facilities, collaborate with others, and acquire services, music, and curricula is enhanced by the generosity with which we invest in ourselves.

UUA Fund Raising Consultant Larry Wheeler has said that growing congregations typically need to average 2.5-3.5% of members' income to accomplish all that they typically want to do. As a result, this plan sets lofty goals for increasing members' annual giving to the Congregation. While some individuals might view the goals as unattainable, our success in moving towards a home of our own and an increased presence in our community requires that we achieve the giving levels we have projected. The leadership of the Congregation will undertake steps to educate the Congregation as a whole concerning the church's financial needs and to increase per-unit giving.

3. Goals Concerning the Structure of and Communications within the Congregation

As the Congregation has grown, old, familiar ways of organizing, functioning and communicating must give way to new methods more suited to the program church we are becoming.

Restructure the Congregation along the lines outlined in Section III.D, above. Revise the by-laws such that the Board assumes greater oversight and policy-making functions and leaves to the committees the day-to-day operations of the Congregation.

Many of our operational and organizational practices and structures have changed with our increased size. By-law revisions will reflect these changes, including the new organizational structure and governance model. The revision will be completed during the 2005-06 church year.

Assemble a Policy Manual established or approved by the Board.

As part of the move toward a policy governance model for Board leadership, and because clear and well-stated policies are more likely to be successful in their implementation, we will create a manual of established policies and procedures for the Congregation as a whole.

Facilitate communication among the committee chairs and between committee chairs and the Board of Trustees.

Through regular meetings, the Coordinating Council will provide a forum for open communication and sharing of ideas among the committees. The Coordinating Council, through the Vice President, will facilitate communication between committees and the Board. Among other things, the members of the Coordinating Council may become aware of policy issues that need addressing. Such issues can be discussed at the Coordinating Council in anticipation of the Council's making recommendations to the Board of Trustees.

Identify opportunities for coordination of committee programs and for sharing resources.

The Coordinating Council will improve awareness of other committees' activities, the need and/or availability of resources, and opportunities for collaboration.

4. Goals Concerning Relations within the Congregation.

To the extent possible, leaders in the Congregation must be in the forefront of ensuring that the Congregation is taking care of itself and its own and that relations within the Congregation are healthy.

Develop an effective pastoral care program.

The Pastoral Care Committee and the minister will work together to expand our current program, so that we have an operating network of members prepared to offer or arrange assistance to others. With such a program in place, we can better anticipate needs and provide opportunities for helping others, strengthening our community, and deepening our relationships. Together, the minister and the Committee will be more alert to the pulse of the congregation and be able to respond to special needs as they arise.

Improve the Congregation's understanding of the Committee on Shared Ministry (CoSM).

CoSM will make itself and its role within the congregation better known through workshops, presentations or whatever other avenues appear most likely to convey to the Congregation a deeper understanding of CoSM's role and mission and of the shared ministry of the Congregation as a whole.

Improve the Quality of Relationships within the Congregation.

As leaders of the Congregation, the Minister, the DRE, the Board, and the Committees will at all times demonstrate for the larger Congregation modes and methods of relating that reflect the respect we have for each other and each other's unique gifts, challenges, and ideas. We likewise will accept constructive feedback and criticism, recognizing that it is all intended to improve the quality of our Church, our relationships and our lives.

Encourage the Continued Development of the Covenant Group Program.

Covenant groups can provide their participants tremendous support and can help strengthen the ties of their participants not only to each other, but to the Congregation as a whole. Recognizing this, the Congregation undertook to develop a covenant group program last year. We will continue to develop the growth of this program and the education of the Congregation as a whole about the benefits, obligations and conditions of participating in covenant groups.

5. Goals Concerning the Congregation's Relationship with the Larger Community

Underlying this Comprehensive Plan is the Congregation's stated desire to grow to between 250 and 300 members. We must at all times remember that growth is of value only to the extent it allows us to serve and actively participate in an ever-wider cross section of the communities in which we live.

Increase denominational understanding and participation by the congregation and its members.

Delegates should be identified and sent to UUA's annual General Assembly, and the cost of doing so should be underwritten to the fullest extent possible. Likewise, attendance by our DRE and other professional staff should be encouraged and subsidized. The Congregation also will encourage broader member and youth participation at General Assembly, the district's Annual General Meeting, and other denominational events and conferences. The congregation will hold regular classes in UU history, identity and related topics.

Promote congregational growth.

The Board will provide the leadership and tools to encourage and support the work of the standing committees that is, by its relevance and vibrancy, a primary attractor of new members. The Congregation will increase its annual giving and undertake a capital campaign so as to improve its visibility in the community and promote growth, which will, in turn, allow the Congregation to undertake ever larger projects and provide ever-expanding worship and community services to its members and within the wider world.

Strive for more active sharing of UU values in the wider community.

CUUC will expand outreach through Social Action and Adult Programs with offerings that are welcoming throughout our wider community. This will serve to express our values and mission, as well as attract new members. Continue with participation in Interfaith Council and related activities, and sharing the lead with other churches in offering programs and public forums.

FIVE YEAR GOALS

B. Worship

Mission Summary

The Worship Committee works in partnership with our minister to develop and support consistently high-quality worship services while being flexible and responsive to the needs of our growing congregation. We draw on a wide range of sources, including Unitarian Universalist and other faith traditions as well as the rich traditions and experiences of our own congregation. Our goal is to create opportunities for everyone seeking a spiritual home to “worship with open hearts” by offering services that are welcoming, accessible, uplifting, and relevant to their lives.

Specific Goals

- Establish a collaborative, sustainable, and easily understood model for the Worship Committee that includes a clear description of its role, its goals, and its relationship with the minister.
- Increase coordination in the planning of music and worship, integrating various kinds of music into our services in consistent and meaningful ways.
- Expand opportunities for lay people to be involved in our services in meaningful and collaborative ways.
- Develop a sustainable model for creating and executing high-quality summer worship.
- Incorporate children and youth into our worship in meaningful ways.
- Offer a high-quality, sustainable intern program.
- Create a beautiful, welcoming, and inviting worship space.

Goal Descriptions

Establish a collaborative, sustainable, and easily understood model for the Worship Committee that includes a clear description of its role, its goals, and its relationship with the minister.

For many years, the Worship Committee has been the place where all decisions were made about both the form and content of worship in our congregation. While the Committee continues to have primary responsibility for worship, several significant decisions made by our congregation in recent

years now require some clear rethinking of the role of the Committee in the years ahead. In 2003, for example, our congregation decided not to shut down for the summer and began offering a single service between June and August. In 2004, our congregational growth led us to begin offering two services every Sunday between September and May. And in 2005, we called our first settled, full-time minister.

The Worship Committee expects to spend the first year of our five-year plan reviewing all aspects of our committee structure, our mission, our goals, and our relationship with – and responsibilities to – our minister. The result will be a new charter, a document we will review the next year.

Increase coordination in the planning of music and worship, integrating various kinds of music into our services in consistent and meaningful ways.

Music, both choral and instrumental, can and should play an integral part in our worship. We intend to focus on way to effectively integrate not only the work of the choir but also the gifts of various musicians in our congregation into our worship.

Expand opportunities for lay people to be involved in our services in meaningful and collaborative ways.

Our congregation was led by lay people for more than three decades and has a rich history of lay involvement in worship on which to draw. Moreover, the involvement of lay people in our worship can enrich both our sense of ownership in worship as well as the variety we offer. The Worship Committee needs to be very clear about how and when lay people can be involved in creating, supporting, and leading worship so that people with different backgrounds, skills, and interests can share their gifts in ways that help make worship accessible, uplifting and relevant to as many people as possible.

Develop a sustainable model for creating and executing high quality summer worship.

Since summer worship was first offered at Cedars in 2003, it has been conceived of as something separate from the rest of the year. In 2005, a Summer Planning Task Force of the Worship Committee was created in the spring to consider how to structure the summer services and plan specific ones. Building on that momentum, the Worship Committee needs to incorporate the summer into its annual planning process and coordinate that planning with potential lay leaders and other committees that are affected by our summer plans.

Incorporate children and youth into our worship in meaningful ways.

Families with children have been one of the main engines of growth for our congregation in recent years and will continue to be into the foreseeable future. In collaboration with the Director of Religious Education and youth leaders, the Worship Committee intends to build on a rich history of intergenerational services by incorporating their planning into our annual planning process. We also intend to look for other ways to incorporate children and youth into our services on a regular basis.

Offer a high-quality, sustainable Intern Program.

Cedars backed into an Intern Program when our Interim Minister fell ill and arranged to have an intern work with us. It was a tremendous success, in large part because of the personalities involved. Our goal now is to build on that success by learning more about sustainable internship programs and developing one that will fit our needs and strengths. We hope to become a "teaching congregation" that offers high-quality experience to ministerial candidates while incorporating their gifts into our worship on a regular, ongoing basis.

Create a beautiful, welcoming, and inviting worship space.

Whether we are renting a middle school multipurpose room, claiming our own rented space, or building our own space, the space where we worship demands our attention and intention. The Worship Committee will take primary responsibility for reviewing on an ongoing basis the worship space, its constituent pieces, and any additions or changes that might enhance our shared worship experience.

FIVE YEAR GOALS

C. Learning

1. Lifespan Faith Development

Mission Summary

The presence of a vibrant religious education program has been a driver for the growth of this congregation nearly since its inception. One of the four tenets of our mission statement speaks to our commitment to “nurture a learning spirit.” That commitment creates its own positive energy.

Our congregation recognizes that a learning spirit may be shaped in the early years, but it need not flag with the onset of adulthood. To capture the energy that emanates from our recognition of the value of lifelong learning, the Religious Education (RE) program that currently serves children and youth will therefore expand to include Adult RE.

The Religious Education Committee will be renamed the Lifespan Faith Development (LFD) Committee to reflect the expansion of its mission. The LFD program will be headed up by the Director of Religious Education (DRE), whose job will over the next five years be incrementally expanded to full time. A part-time assistant will be assigned to the LFD program to assist the DRE. In order to fulfill the LFD program’s mission of active engagement and nurturance, a significant portion of Cedars’ new facilities will be devoted to space that facilitates learning for all ages.

Specific Goals

- Expand and re-envision the Religious Education (RE) program to form the Lifespan Faith Development (LFD) program (2006-07).
- Increase staff in stages to accommodate the new LFD program.
- Design and build a collection of rooms in view of the new LFD program (2006-07).
- Revise the annual church budget to support the LFD program (all years).
- Increase the number and support of volunteer teachers to accommodate increased enrollment of children and youth (2006-07).
- Institute a program that facilitates children and youth involvement in the larger congregation and community (2007-08).

- Acquire or modify curriculum for children and youth that fosters spiritual development, religious literacy and sound decision-making skills (2005-06).
- Formalize an RE program for adults that allows for the exploration of spiritual development and religious literacy in a pedagogical setting (2006-07).
- Assign a task group to develop a brochure explaining the LFD program (2006-07).

Goal Descriptions

Expand and re-envision the Religious Education (RE) program to form the Lifespan Faith Development (LFD) program (2006-07).

In 2006-07 the RE program which currently serves children and youth will be extended to include Adult RE. The Director of Religious Education (DRE) will coordinate the use of facilities and resources available to the LFD program with leaders of task groups formed to provide religious education and faith development to all ages.

Increase staff in stages to accommodate the new LFD program.

The position of Director of Religious Education (DRE) will be 3/4-time by 2006-07 and full-time by 2008-09. In the intervening year (2007-08) an Assistant DRE will be hired at one-quarter-time, which position will increase to half time in 2009-10.

Design and build a collection of rooms in view of the new LFD program (2009-11).

Given that the facilities required for RE are primarily used on Sunday mornings and the programming for adults is intentionally scheduled for times outside Sunday-morning worship, the physical requirements for each program are most efficiently addressed with both in mind. In anticipation of the move into our own church home, the DRE and other leaders within the LFD program will participate in the design of the layout and appearance of new facilities for LFD programming. Design priorities include:

- Separate rooms for each RE class (four children's classes plus one room each for junior and senior youth), with one of these rooms available for Adult RE during Sunday worship services, and two or more available for Adult RE and Adult Programming at other times.
- Separate room appointed with safety in mind for infants and toddlers in childcare.

- Access to an outdoor area suitable for children's play and including space in which to develop outdoor learning program.
- Access to an open room in which an all-ages intergenerational service could be conducted separate from but coextensive with services in the larger sanctuary.
- Access to a large kitchen facility for special projects and class parties.
- Separate administrative office for the DRE and support staff, with sufficient space for counseling or small meetings and work space for special projects

Revise the annual church budget to support the LFD program (all years).

The RE program will have expanded to include not only children and youth but also adults as well. Moreover in recognition of its role as a significant driver of church growth, the LFD program will be allocated sufficient funds from the budget to facilitate the program's smooth operation. In addition to adequate paid staff, the LFD program will have an operating budget that allows for the purchase and maintenance of administrative support equipment. Budget appropriations will be sufficient to cover the entire LFD program for both children and adults.

Increase the number and support of volunteer teachers to accommodate increased enrollment of children and youth (2006-07).

The number of children and youth attending RE is anticipated to grow from 40-60 to approximately 150 children and youth every Sunday in 2009-10. Currently 25 volunteer teachers, assistant teachers and substitute teachers work in teams of 4-6 per classroom, rotating on a year-round schedule. In order to adequately staff all children and youth classes for two services, 40-45 adults will comprise the volunteer teacher corps. To emphasize our support of volunteer teachers, we will send representatives to the PNWD Spring RE retreat, the UUA Renaissance Modules in autumn and spring, and specialized training for youth advisors; and hold a one-day or overnight retreat for learning, relaxation and team-building among members of the teacher corps.

Institute a program that facilitates children and youth involvement in the larger congregation and community (2007-08).

By 2006, every church-sponsored event (e.g., the annual auction, the stewardship dinner, community-wide programs or ceremonies) will include a component for the care and/or involvement of children and the opportunity for the youth to provide assistance. Participants in the LFD program will work with the Worship Committee to plan an intergenerational service

featuring a performance by children and youth (e.g., a musical or dramatic presentation), as well as one service led by church youth. In order to facilitate the learning that takes place when children of different ages work together, the LFD program will provide more multi-age experiences such as a group social action project, choir performance, or free-time mingling.

Acquire or modify curriculum for children and youth that fosters spiritual development, religious literacy and sound decision-making skills (2005-06).

By 2006, programming based on Unitarian Universalist teachings, world religions and other faith traditions will be in place to teach children and youth from pre-kindergarten through high school. Curriculum for youth and older children will draw from comparative religion courses and other UUA material developed for the high-school level. In the 2005-06 academic year, the RE program will focus on the second year of a two-year curriculum that rotates between two pillars (1 – “UU’ism” and Me; 2 – “UU’ism” and World. The core group of adults who are trained to lead programs such as Our Whole Lives (OWL) and Mentoring/Coming of Age will be expanded. By 2007, facilities including a Children’s Chapel will be available to enable children to come together in worship.

Formalize an RE program for adults that allows for the exploration of spiritual development and religious literacy in a pedagogical setting (2006-07).

In 2006-07, when RE for everybody is reconstituted as Lifespan Faith Development, the DRE will coordinate the offering of at least one Adult RE class per quarter. Preceding this, the DRE will survey the membership to determine the strongest areas of interest for Adult RE. The DRE and the minister will collaborate to identify and coach people within and outside the congregation to teach specific Adult RE classes as part of the LFD program. Working in conjunction with the Adult Program Committee, Lifespan Faith Development for adults might include classes addressing topics such as UU parenting, whole-life sexuality awareness, or the historical development of Unitarian Universalism.

Assign a task group to develop a brochure explaining the LFD program (2006-07).

Both an informational as well as a marketing piece, a brochure explaining the Lifespan Faith Development program of CUUC should get visitors, new members and formerly uninterested members excited about joining a community of people dedicated to lifelong learning and spiritual growth.

FIVE YEAR GOALS

C. Learning

2. Adult Programs

Mission Summary

Our forty-five year history as a fellowship evolving into a church has been marked by a wide variety of lay-organized adult discussion groups, study circles, forums, other events and activities. The present-day versions of these activities support two elements of the Cedars mission statement: To "nurture a learning spirit" and to "serve justice with compassion." The goal statement of Adult Programs is included here in the Learning section because, even though the topics presented often are of immediate social significance, the primary purpose of Adult Programs is to educate and inform rather than to act.

The varied adult learning programs provide a sense of continuity to the historic roots of the congregation, and have frequently helped drive the growth for our congregation. This is in part because of the outreach to the greater Bainbridge Island and North Kitsap communities through community forums and other events open to the public.

Reflecting this historical learning tradition, the AP Committee proposes to continue to sponsor programs primarily for adults, and primarily of the following kinds: (i) seminars, workshops, courses, film events and study circles (four to six per year), and (ii) community forums (2-3 per year) addressing the shared concerns and highest values of the congregation and the community. Those and other types of learning activities are intended to involve community building and outreach. They are intended to embody interactive learning, meaningful discussion, to raise consciousness, to develop spiritually and to cultivate an understanding of UU values.

Specific Goals

- Starting in the 2005-06 year, and thereafter, the Committee will seek to increase the number and kinds of programs that are jointly sponsored with other Cedars activity committees.
- Assist in developing a Green Sanctuary Committee as a sub-committee of the AP Committee; assist the Green Sanctuary Committee in developing a series of program activities culminating in qualifying Cedars as an approved Green Sanctuary congregation.
- Each year, jointly sponsor at least one forum or other community-focused activity with one or more other churches and/or the Interfaith Council.

- There will be steady growth, year over year, in the number and variety of activities offered, and in the number of Cedars and community members participating.
- The Committee will continue to provide for “scholarships” and waiver of event donations or study circle tuition to avoid preventing attendance by persons of limited means.

Goal Descriptions

Starting in the 2005-06 year, and thereafter, the Committee will seek to increase the number and kinds of programs that are jointly sponsored with other Cedars activity committees.

These jointly sponsored activities would include, for example:

- With the RE Committee: In 2005-06, jointly sponsor programs on topics such as: (i) UU Parenting, (ii) religious issues from a historical and comparative-study perspective. In later years, continue to explore opportunities to jointly sponsor learning activities with the RE Committee.
- With the Social Action Committee: In 2005-06, jointly sponsor an environmental film series, a Sunday service on a “Ministry for Earth” theme, and other events supporting an application to become a Green Sanctuary (see “Green Sanctuary” goal, below). In later years, continue to explore opportunities to jointly sponsor workshops and other learning and action events with the SA Committee.
- With the Membership Committee: In 2005-06, jointly sponsor an adult learning program to help orient new members to UU traditions, values and principles – called “UU & You.” In subsequent years, cooperate with the Membership Committee to incorporate that Committee’s perspective on helping ensure that AP Committee events help to attract new members to Cedars. Where AP Committee events generate ongoing interest in a topic or activity, suggest to the Membership Committee the possibility of a Covenant Group on that topic or activity.
- With the Worship and Celebration Committee: The AP Committee would suggest and offer to engage annually in the planning and delivery of at least one worship service that embodies a theme of particular relevance and interest from the Adult Programs perspective.
- With the Communications Committee, the AP Committee will increase its communications presence for Cedars and the community by growing its portion of the Cedars website to include notices of events

and opportunities for profound learning and spiritual development of interest to the community as well as to Cedars members.

Green Sanctuary Program

Assist in developing a Green Sanctuary Committee as a sub-committee of the AP Committee; assist the Green Sanctuary Committee in developing a series of program activities culminating in qualifying Cedars as an approved Green Sanctuary congregation.

Starting in Fall 2005, the AP Committee has engaged in joint activity with the Social Action Committee on environmental themes supportive of the UU Ministry for Earth. Two Sunday services on that theme are planned, including one in November 2005 with Rev. Katherine Jesch, Director of Environmental Ministries, as guest minister. The 2005-06 church year also includes a series of environmental films and a course from the curriculum of the Northwest Earth Institute. The application process for Green Sanctuary status is expected to begin in the 2005-06 church year and culminate in Green Sanctuary status for Cedars by the end of the 2006-07 year.

Joint Activities with Other Churches and Interfaith Counsel

Each year, jointly sponsor at least one forum or other community-focused activity with one or more other churches and/or the Interfaith Council of Bainbridge Island / North Kitsap (IFC).

In Spring 2005, the Committee jointly sponsored a community forum on the Role of Religion in the Public Square attended by approximately 210 people from Cedars and the community. The joint sponsors included the IFC and a dozen other local churches and community organizations. In Fall 2005, an environmental film series is being jointly sponsored with Eagle Harbor Congregational Church. Between 2005 and 2010, it is a goal, each year, to jointly sponsor at least one major community forum or other substantial learning event with one or more other churches and/or the IFC.

Growth in Program Offerings and Participation

There will be a steady growth, year over year, in the number and variety of activities offered.

From 2005-10, the number and variety of offerings will increase, including, for example, study circles, community forums, guest lectures, topical workshops and special events. Likewise, we expect that percentage of Cedars members participating in Committee-sponsored events, cumulatively over the course of a year, to steadily increase to a substantial majority of Cedars members by 2010.

Resourcefulness and Ensuring Access for Those of Limited Means

The Committee will continue to provide for “scholarships” and waiver of event donations or study circle tuition to avoid preventing attendance by persons of limited means.

Historically, the AP Committee has found that participants in activities are happy to contribute to Cedars as a way of expressing appreciation for events, and as a way to acknowledge the cost of space, refreshments, and, on occasion, speaker honorariums. The AP Committee proposes to continue to allow such voluntary donations to Cedars. However, “scholarships” and waiver of donations or tuition will continue to be applied to ensure that access to events is preserved to persons of limited means. Furthermore, it continues to be the goal of the AP Committee to be resourceful in event planning, and frugal with expenses that cannot be avoided.

FIVE YEAR GOALS

D. Service

Mission Summary

The Social Action Committee believes that a commitment to social justice is a natural extension of both our church's mission statement to serve justice with compassion, and the Unitarian Universalist principles. We further believe that integrated and coordinated social action is integral to the life and growth of our church. Our mission, therefore, is to identify and facilitate involvement in social action projects to which we can make a positive and substantive contribution.

Specific Goals

- Increase congregational involvement in social action projects to seventy percent of the congregation participating in at least one project per year by June 2008 and ninety percent by 2010.
- Coordinate social action efforts with a fellow UU church by collaborating on one project per year by 2008 and one or more by 2010
- Collaborate with other congregational committees on at least two projects per year by 2006 and three or more projects per year by 2010
- Establish a child and youth program for social action by 2007 and sponsor at least two social action projects per year by 2010
- Be a resource for local community service projects and volunteer opportunities by initiating a web resource link on the social action page of the church website by 2006
- Begin active involvement in the regional and/or national UU social action groups by 2007

Goal Descriptions

Increase congregational involvement in social action projects to 70 percent of the congregation participating in at least one project per year by June 2008 and 90 percent by 2010.

CUUC members will participate regularly in social action projects through commitments of time, effort, and finances. Examples of projects might include participating in Super Suppers sponsored by the Interfaith Council, attending a community service day, walking in Crop Walk, or participating in

coordinating the Alternative Gift Project. The social action committee will solicit input from church members regarding their social action interests on a periodic basis. As the membership of the church grows, sub-task groups of the social action committee can lead some of these efforts which will allow the social action committee to expand projects in other areas.

Coordinate social action efforts with a fellow UU church by collaborating on one project per year by 2008 and one or more by 2010

CUUC will coordinate social action projects with fellow UU churches in order to support the principles of Unitarian Universalism and widen our efforts while building community ties. Examples of collaboration might include expanding the Alternative Gift Project across congregations and assisting with a project initiated by a fellow UU church. The social action chair will initiate the development of these relationships.

Collaborate with other congregational committees on at least two projects per year by 2006 and three or more projects per year by 2010

CUUC will coordinate social action efforts within its congregational committees to broaden our mission and build community within the congregation. Examples of collaboration efforts might include coordinating a social justice film series with the Adult Programs Committee and coordinating Sunday services focusing on social action with the Worship Committee. Regular coordinating council meetings of committee chairpersons will facilitate conversations to foster collaboration.

Establish a child and youth program for social action by 2007 and sponsor at least two social action projects per year by 2010

CUUC will coordinate social action efforts that are intergenerational, and children and youth oriented. Examples of such programs might include community service days, special food or toy drives, and making cards for the Interfaith Caregivers. A social action committee member will lead this effort with the religious education committee chairperson.

Be a resource for local community service projects and volunteer opportunities by initiating a web resource link on the social action page of the church website by 2006

CUUC will act as a resource for people interested in volunteer opportunities in our local community that extend beyond social action projects. There currently is a list that is available at the back table after Sunday services. This list will be posted on the website. A task group will revisit the list every six months to update it.

Begin active involvement in the regional and/or national UU social action groups by 2007

CUUC will engage in regional and/or national social action groups such as the Pacific Northwest District, the UUSC, and or the UUA in order to educate ourselves about social action programs and issues. This will enable us to learn from others who have been successful with social action programs. In addition, we can share our successes and trials with others who may learn from our experiences. An example of this might include writing an article for the UU World highlighting the Alternative Gift Project or leading a workshop at the Pacific Northwest District annual conference.

FIVE-YEAR GOALS

E. Community

Mission Summary

As we work together to “love without judgment,” the newly renamed Member Development Committee is dedicated to making our church welcoming and accessible to people seeking a liberal religious home while helping newcomers and long-time members alike deepen their connections to our congregation and Unitarian Universalism. Our mission is to initiate and facilitate congregation-wide efforts to attract and welcome visitors, engage newcomers, integrate new members, and enrich the lives of everyone who has chosen to join Cedars Unitarian Universalist Church.

Specific Goals

- Increase membership at a rate of 10 percent a year over the next five years.
- Create a culture in our congregation that gives everyone both the tools and the responsibility for carrying out the mission of the Member Development Committee.
- Identify and make effective use of opportunities to articulate Unitarian Universalist values and highlight the work of our church in the larger community.
- Welcome visitors and make our community accessible to them.
- Identify prospective members and make clear to them both the path to and the benefits and obligations of membership.
- Integrate new members into our congregation.
- Identify and develop opportunities for all members to increase their knowledge of Unitarian Universalism as part of a larger effort to increase faith development in our congregation.
- Identify and utilize several different ways of effectively communicating and publicizing our worship schedules and other congregational information on a regular and predictable basis.
- Support and publicize opportunities for members to get to know each other and enrich their lives through involvement in our congregation.

- Develop a system for keeping track of members, their interests and skills, their concerns and needs, and their involvement in various aspects of congregational life.

Goal Descriptions

Increase membership at a rate of 10 percent a year over the next five years.

Our congregation more than doubled in size in the past five years, from 59 pledging adult members in 2000-01 to one hundred fifty two at the conclusion of 2004-05. Our goal is to sustain a similar rate of growth in the coming five years, from those one hundred fifty two pledging adult members in 2004-05 to two hundred seventy two by the conclusion of 2009-10. To do that, we must build on our efforts to attract newcomers while attending to the needs of our existing members. The remaining goals outlined in this section both encourage growth and strengthen our community as it grows.

Create a culture in our congregation that gives everyone both the tools and the responsibility for carrying out the mission of the Member Development Committee.

We will increase membership on the Member Development Committee, give members of our committee meaningful work to do carrying out our mission, and constantly work to develop an integrated and efficient model for the work we do. We cannot, however, do the work outlined below alone. We therefore will seek to create and sustain a culture in our congregation that gives every member both the tools and the responsibility for helping us attract and welcome visitors, engage newcomers, integrate new members, and strengthen our connections to each other.

Identify and make effective use of opportunities to articulate Unitarian Universalist values and highlight the work of our church in the larger community.

In partnership with the Communications Committee, other program committees through the Coordinating Council, and the minister, we will constantly be looking for opportunities to articulate Unitarian Universalist values and highlight the work of our church in the larger community. We have no doubt that a great many people in the larger community would be interested in joining us if they knew of our tradition and the work we are doing. Press releases about public events we are sponsoring and outreach efforts we have undertaken, the involvement of our minister in the annual Interfaith Thanksgiving service and other public forums outside our church, and our congregation's continued involvement in the Interfaith Council efforts like the Crop Walk and the ongoing Super Supper program are just a few of the ways we can raise our profile in the larger community.

Welcome visitors and make our community accessible to them.

When visitors do join us for worship, we will welcome them, provide them with basic information about Unitarian Universalism as well as our congregation, and follow up with them. We will continue to make use of a Visitors Book, encouraging visitors to sign it and following up by sending them a personal card and putting them on our newsletter mailing list. We will also give all visitors a small packet of information including a brochure about our congregation and let them know about our regularly scheduled orientation sessions.

Identify prospective members and make clear to them both the path to and the obligations and benefits of membership.

We want to make it easy and inviting for anyone who is interested in our church to learn more about us and become a member of our congregation. To do that, we will offer orientation sessions following our church services on a regular basis featuring our minister, the chair of Member Development Committee, and a representative of the Stewardship Campaign. Every visitor will be given a personal invitation to one of these sessions. We will follow these sessions with a one-on-one new member home interview with anyone who is interested in becoming a member so we can learn about the needs and interests of the individual and answer any questions about our congregation. At the interview, benefits and responsibilities of membership will be presented. UUA pledge guidelines will be discussed and pledge documents completed and collected. New members will be welcomed into membership at quarterly ingathering, which will commence with their signing of the membership book.

Integrate new members into our congregation.

Membership in our congregation should be seen as a beginning point rather than an end. Integrating new members and helping them find meaningful and satisfying ways to join in the life of our congregation is therefore a critical part of our mission. New members will be assigned to one of our smaller neighborhood "teams" based on where they live and the leaders of their team will be responsible for welcoming them and incorporating them into the team. Their pictures and brief biographies will appear in our newsletter and information about their interests and skills will be passed along to the appropriate committee chair or individual for followup.

Identify and develop opportunities for all members to increase their knowledge of Unitarian Universalism as part of a larger effort to increase faith development in our congregation.

We believe that one of the most important tools we can all have for both our own faith development and our outreach to potential members is an increased understanding of what it means to be a Unitarian Universalist. In

partnership with the Adult Programs Committee, the Member Development Committee will develop and offer regularly scheduled and well publicized classes exploring Unitarian Universalism, its history, and its current work and challenges. These classes will be open to all congregation members and our hope is that everyone in the congregation will eventually attend at least one. An introductory text on Unitarian Universalism that serves as the text for this UU & U class will be given as a gift to all new members. We will also seek to work with the Communications Committee, the Rainbow Reserves, other program committees through the Coordinating Council, the Board of Trustees, and the minister to increase congregational awareness of the Unitarian Universalist Service Committee, the Chalice Lighters program, the work of the Pacific Northwest District and other area churches as well as our own status as a Welcoming Congregation.

Identify and utilize several different ways of effectively communicating and publicizing our worship schedules and other congregational information on a regular and predictable basis.

If newcomers and long-time members alike are to feel part of our ongoing effort to “worship with open hearts, nurture a learning spirit, serve justice with compassion, and love without judgment”, everyone needs to know what programs are going on and what services are available in our congregation. This is of particular concern to the Member Development Committee as we work to attract newcomers and strengthen the commitment and sense of satisfaction of existing members. Put simply, we want everyone to feel included and as involved as they want to be in the life and work of our congregation.

Because different people absorb information in different ways, we believe we should work to identify several different ways of effectively communicating and publicizing our worship schedule, upcoming events, and general congregational information on a regular and predictable basis so that as many people as possible know as much as possible at any given time. This is part of a larger effort to make everything we do at Cedars as accessible and also will involve the Communications Committee, other program committees through the Coordinating Council, and the Office Administrator. Our monthly newsletter, expanded announcements in our Order of Service, a weekly e-mail containing the announcements from the Order of Service, and a “reader Board” in the area where we have coffee are among the avenues we will explore.

Support and publicize opportunities for members to get to know each other and enrich their lives through involvement in our congregation.

We believe it is our job to be sure that every member of our congregation is connected to our congregation in a meaningful and enriching way. Our primary means of doing this is the neighborhood “team” system we set up in coordination with the Worship Committee in the summer of 2005. Every

member of the congregation is now on a Neighborhood Team of between fifteen and twenty adult members. Each team has two leaders. These teams will take turns doing the set-up and take-down of our Sunday services. They will also serve as small support systems as members get to know each other, their needs, and their interests better through periodic potlucks, e-mail exchanges, and other efforts now being developed.

In addition to overseeing these teams, we are always looking for ways to support and publicize other "joining" opportunities for members. Some members are most interested in deepening their own spiritual life, others are most interested in getting to know other people on a casual basis or through shared interests, others are most interested in being part of small and intimate groups that support and nurture each other, and others are most interested in doing tasks and projects. Whatever their interests, individual members of our congregation should know that they can find a home within our larger home. While it is not our role to create or sustain these various "joining" opportunities, the Member Development Committee has a particular interest in supporting and publicizing the formation of Covenant Groups and Study Circles, the ongoing availability of Circle Suppers, the work of the Rainbow Reserves, and the work of various task forces and committees.

Develop a system for keeping track of members, their interests and skills, their concerns and needs, and their involvement in various aspects of congregational life.

Just as a decision to join Cedars is the beginning rather than the end, the new member home interview we do with prospective members will be the beginning of a longterm effort to track individual members, their interests and skills, their concerns and needs, and their involvement in various aspects of congregational life. With the help and support of the Coordinating Council and the Communications Committee, we will not only serve as a sort of clearinghouse for both new and existing members but also as a planning resource for other committees and the Board of Trustees as they seek to be responsive to the growing and changing needs of our congregation. With the Pastoral Care Committee we will develop a system for learning about and responding to the pastoral concerns and needs of congregational members. We will monitor the demographics of visitors and new members and work with the Treasurer of our congregation to learn as much as possible about who we are serving at any given time. In the event that individuals choose to leave Cedars, we also will do exit interviews to better understand why they are leaving and whether their departure suggests areas where we as a congregation need to improve.

FIVE-YEAR GOALS

F) Our New Home

Summary

Cedars U.U. Church is one of the fastest growing UU congregations in America. Having outgrown our prior rented and much-loved space at Hyla Middle School, we moved this past Summer into the Playhouse because the possibility of moving into owned, permanent space is years off. While we continue to work through the kinks of worshipping in the Playhouse, we hope and expect that it will accommodate continuing growth in the near term and provide interim space for worship, learning, service, and community until we have space of our own. Likewise, our new office space in the Sterling Building should provide substantially improved space in which we can better support the work of our congregation, and we hope that we can occupy this or similar rented office space until we have a building of our own.

The focus of our congregation's use of future space therefore can turn to our finding appropriate land on which to build a facility of our own or to acquire an existing facility, if possible.

We have considered the possibility of acquiring property for many years. Over that time, we have surveyed the congregation and looked at various properties, but generally made little meaningful progress. The chief initial question, of course, is whether to search for property on or off Bainbridge Island. Property, both raw and improved, is less expensive off the Island, and so many have advocated for a move to permanent space in Suquamish or another location near the Island. Still others note that many will not leave the Island to worship and insist that a move off the Island therefore will be the death-knell of the congregation.

Statistically, the congregation's base remains on Bainbridge Island: at present, roughly seventy-five percent of our members live on Bainbridge Island. That percentage undoubtedly is changing, however, as more of our newer members come from areas off the Island, and some would view the current trend as suggesting that we should search for space off the Island. In the end, no amount of research or polling can resolve this question any more than could a series of town meetings, ongoing debate or discussion. There is one factor that tips the balance, however, that until now has not been well enough considered: the potential for regional growth, not of our congregation, but of our denomination.

Specifically, our congregation indicated in December 2004 that its ideal size is between two hundred fifty and three hundred members. We know that, demographically, there are well more than that number of folks on and off the Island who could consider Cedars as their faith home, but will not be able comfortably to do so if we cap our growth at between two hundred fifty and

three hundred. Logic thus suggests that over the long term our region as a whole (rather than just our congregation) could support and would be best served by the development of a new UU congregation in northern Kitsap County. To help foster the development of such a congregation, we will need to work with our sister congregations in Bremerton and Port Townsend. We also will need to leave space, literally, within which a new congregation can grow.

And so our ideal location for a permanent church is on Bainbridge Island. We are open either to acquiring an existing facility, or acquiring vacant land and building a church. Both of these options are expensive propositions that will involve a lengthy process of detailed planning and fundraising. An existing building might be somewhat less expensive than new construction, but the availability of suitable buildings in our area is even more limited than that of vacant parcels of suitable size, location and zoning. Our plan therefore assumes, but should not require, that we acquire raw land.

The UUA Site Acquisition Program has recently become available. We believe we qualify and will make every effort to participate in it. This program could accelerate the timeline for settling into our permanent space.

Specific Goals

- Complete this Comprehensive Plan
- Engage in a Capital Campaign Feasibility Study
- Submit a Completed Application to the UUA's Site Acquisition Program
- Execute a Capital Campaign
- Acquire a Site
- Execute a Second Capital Campaign
- Build a Church
- Apply the Seventh Principal to Our New Home

Goal Descriptions

Complete this Comprehensive Plan

Only through temporal manipulation could we list as a goal the completion of the Plan in which the goals will be listed – after all, the plan is a statement of our future, not of our past (even our immediate past). But the completion of the Comprehensive Plan requires more than its publication, and this goal is included here to acknowledge the central importance of the plan to all that

follows. The Comprehensive Plan will not be complete until and unless the Congregation votes to approve it, and so that vote is a goal inherent to the plan. Moreover, our fundraising consultant, Larry Wheeler, will not let us undertake steps toward a capital campaign absent an approved plan. Such a plan is thus required before we can engage Larry to perform a feasibility study, which itself is a sensible prerequisite to a capital campaign and, therefore, the acquisition of property. Moreover, an application to the UUA's Site Acquisition Program requires a completed feasibility study, and thus is also dependent on the completion and approval of this plan. As a result, our entire site acquisition goals key off the Congregation's approving a Comprehensive Plan. Hence the goal of completing the Comprehensive plan in a timely manner.

Engage in a Capital Campaign Feasibility Study

The feasibility study is the process by which we determine whether a capital campaign will be sufficiently successful to justify its undertaking. Larry Wheeler will interview an appropriate cross section of the congregation and from the information and data he collects will project the likely outcome – in pledges – of a capital campaign. His interviews also will provide softer information concerning the possible capital campaign. As noted above, a completed feasibility study is a prerequisite to applying to the UUA's Site Acquisition Program.

Submit a Completed Application to the UUA's Site Acquisition Program

As soon as possible after the completion of the feasibility study we will submit our application to the Site Acquisition Program in order to acquire property for us until such time as we can purchase the property from the UUA. The program presupposes a successful capital campaign in accord with the feasibility study and the identification of an appropriate property. In addition to helping acquire property before we could afford to do so ourselves, the Program offers the substantial benefit of a one-time grant from the UUA of up to 1/3 of the acquisition cost up to a preset maximum.

Execute a Capital Campaign

The initial capital campaign will be undertaken in conjunction with our annual Spring Pledge canvass. A dual stewardship/capital campaign relies on fewer volunteer resources, and precludes the sense that the congregation is constantly being asked for funds.

Unless the feasibility study reveals surprising information, we must assume that the initial capital campaign will raise enough funds to allow us to acquire unimproved property, and that a second campaign will be necessary to raise the funds needed to build a building. If so, the initial campaign would be completed this spring, and payments on capital contributions would be made

over a three-year period beginning in fiscal year 2006-07 and ending in 08-09. During this same period, we hope to acquire property through the Site Acquisition Program.

Acquire a Site

Site acquisition costs on Bainbridge Island may be as much as \$600,000 in 2006-07. The site will conform to UUA Site Acquisition guidelines to the extent possible, recognizing the limited availability of suitable land in our area. From a planning perspective, the following guidelines are of particular interest:

- The site must be located in a visible "anchor" location.
- The site must provide *at least* one acre of unobstructed land for every fifty people expected to attend a Sunday service. With a membership growth target of three hundred, a two hundred forth seat sanctuary, and a two-service Sunday program, we expect a maximum single service attendance of two hundred. This translates into a minimum size of four acres; a five-acre site would be preferable.
- The site must provide room for at least one parking space for every three seats in the sanctuary. If multiple worship services are anticipated, increased parking space will be needed to manage the overlapping time between services. This formula requires parking for 80 cars minimum; a twenty five percent increase for the two-service overlap results in a parking capacity of one hundred.

A site acquisition task force is being re-formed and charged with the task of identifying and evaluating suitable sites.

Execute a Capital Campaign

The second capital campaign is designed to raise funds to allow us to build an initial church building. It will be undertaken, like the first, in conjunction with our annual Spring Pledge Canvass and be completed in the Spring of 2010. Payments on capital contributions would be made over a three-year period beginning in fiscal year 2010-11 and ending in 2012-13.

Build a Church

Construction of our church will be phased to keep pace with our ability to raise the necessary funds. Construction costs (including design, permits, and site work) could total as much as \$1,500,000, depending on the size and nature of the building.

In the initial phase we will build a fellowship hall, religious education wing and offices. Initially, we will hold our services in the fellowship hall. As

additional funds become available toward the end of the second capital campaign, we will construct the sanctuary.

Cedars UU Church is fortunate to have several architects and engineers among its members, and so we should be in a strong position to recruit a building design committee to guide the preliminary planning for the new church. However, it is recommended that we hire third-party architectural and engineering firms, for any number of reasons, not the least of which are concerns regarding professional liability.

Once totally complete, the new building will have the following spaces and characteristics:

- A multi-purpose fellowship hall that will serve as our temporary sanctuary until the permanent sanctuary is completed. We will gather in the fellowship hall for coffee hour, potlucks, dinners and other special events. We will make the fellowship hall available to other communities in the area and thus generate goodwill and much-needed additional income.
- A sanctuary large enough to seat two hundred and forty comfortably. The sanctuary will be well lighted, have good acoustics and be wired to support as many hearing assist devices as are needed. It will be comfortable and simple. Its form will follow its function in all respects.
- Office space to allow for our growth in staff to include two ministers, two religious education personnel, an office administrator, and a bookkeeper (at a bare minimum). The office space will also include one conference room.
- Classroom space to accommodate a limited-use daycare facility (for Sunday services, meetings, and the like) and up to six religious education classes.
- Sufficient parking, well maintained grounds, and a playground suitable for use by all.

Apply the 7th Principal to Our New Home

As Cedars proceeds to acquire a property, and to construct a building, our goal will be to follow the Seventh Principle, the guidelines of the UUA Ministry for Earth, and the Green Sanctuary program. Just as our plan envisions that we will apply for Green Sanctuary status over the course of the planning period, we likewise will seek to apply green building techniques and sustainability principles in the acquisition, development, and maintenance of our new home. Not only is this the right thing to do, it may also qualify us for additional financial support from the UUA for congregations that engage in green building initiatives.

FINANCIAL FORECAST

CEDARS UNITARIAN UNIVERSALIST CHURCH

SEVEN-YEAR FINANCIAL FORECAST, 2006 - 2013

Revision 10: October 10, 2005

| Note | 2003-2004 <i>actual</i> | 2004-2005 <i>actual</i> | 2005-2006 <i>budgeted</i> |
|---|----------------------------|----------------------------|------------------------------|
| <u>Membership Statistics</u> | | | |
| 1. Members | 137 | 156 | 186 |
| 2. Children & Youth Enrollment | 65 | 89 | 106 |
| 3. Pledging Units | 84 | 94 | 112 |
| 4. Pledge per Member | \$662 | \$739 | \$861 |
| Pledge per Unit | \$1,080 | \$1,231 | \$1,435 |
| <u>Income</u> | | | |
| 5. Pledges | \$ 90,728 | \$ 115,239 | \$ 160,190 |
| 6. Sunday Offering | 4,680 | 5,455 | 5,500 |
| 7. UUA Subsidies | 13,000 | 11,000 | 9,000 |
| 8. Fund Raising | 15,940 | 743 | 23,700 |
| 9. Friends | 1,499 | 1,928 | 1,750 |
| 10. Program Income | | 2,872 | 1,250 |
| 11. Transfers (Restricted Funds etc) | 4,707 | - | - |
| 12. Other Income | 9,891 | 5,727 | - |
| <u>Total Income</u> | \$ 140,445 | \$ 142,964 | \$ 201,390 |
| <u>Expense</u> | | | |
| HUMAN RESOURCES | | | |
| 13. Payroll Salary & Housing - Minister | | \$ 53,566 | \$ 55,000 |
| 14. Payroll Salary - Intern Minister | | - | - |
| 15. Payroll Salary - Dir of Religious Education | | 16,898 | 16,800 |
| 16. Payroll Salary - Assistant Dir of Religious Ed. | | - | - |
| 17. Payroll Salary - Choir Director | | 6,000 | 6,961 |
| 18. Payroll Salary - Accompanist | | | |
| 19. Payroll Salary - Office Admin/Bookkeeper | | - | 5,456 |
| 20. Payroll Salary - Bookkeeper | | - | - |
| Total Payroll Salary | | \$ 76,464 | \$ 84,217 |
| 21. Payroll Taxes - Minister | | 1,433 | \$ 2,104 |
| 22. Payroll Taxes - All Others | | 1,717 | 2,191 |
| Total Payroll Taxes | | \$ 3,150 | \$ 4,295 |
| 23. Pension - Minister & DRE | | \$ 10,078 | \$ 10,052 |
| 24. Pension - All Others | | - | - |
| Total Pensions | | \$ 10,078 | \$ 10,052 |
| 25. Insurance Benefits - Minister | | \$ 4,735 | \$ 5,740 |
| 26. Insurance Benefits - DRE | | | |
| 27. Insurance Benefits - All Others | | - | - |
| Total Payroll Benefits | | \$ 4,735 | \$ 5,740 |

CEDARS UNITARIAN UNIVERSALIST CHURCH

SEVEN-YEAR FINANCIAL FORECAST, 2006 - 2013

Revision 10: October 10, 2005

| 2006-2007 <i>projected</i> | 2007-2008 <i>projected</i> | 2008-2009 <i>projected</i> | 2009-2010 <i>projected</i> | 2010-2011 <i>projected</i> | 2011-2012 <i>projected</i> | 2012-2013 <i>projected</i> |
|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| 205 | 225 | 248 | 272 | 300 | 330 | 362 |
| 117 | 128 | 141 | 155 | 171 | 188 | 207 |
| 123 | 135 | 149 | 163 | 180 | 198 | 217 |
| \$965 | \$1,080 | \$1,210 | \$1,355 | \$1,518 | \$1,700 | \$1,904 |
| \$1,605 | \$1,800 | \$2,020 | \$2,258 | \$2,532 | \$2,832 | \$3,173 |
| \$ 197,000 | \$ 243,000 | \$ 300,000 | \$ 369,000 | \$ 455,000 | \$ 560,000 | \$ 690,000 |
| 6,050 | 6,660 | 7,330 | 8,060 | 8,870 | 9,760 | 10,740 |
| - | - | - | - | - | - | - |
| 26,070 | 28,680 | 31,550 | 34,710 | 38,180 | 42,000 | 46,200 |
| 1,840 | 1,930 | 2,030 | 2,130 | 2,240 | 2,350 | 2,470 |
| 1,440 | 1,660 | 1,910 | 2,200 | 2,530 | 2,910 | 3,350 |
| - | - | - | - | - | - | - |
| - | - | - | - | - | - | - |
| \$ 232,400 | \$ 281,930 | \$ 342,820 | \$ 416,100 | \$ 506,820 | \$ 617,020 | \$ 752,760 |
| \$ 60,500 | \$ 66,500 | \$ 71,800 | \$ 74,700 | \$ 77,700 | \$ 80,800 | \$ 84,000 |
| - | - | 11,725 | 12,190 | 12,680 | 13,190 | 13,720 |
| 25,350 | 29,850 | 39,800 | 41,390 | 43,050 | 44,770 | 46,560 |
| - | 8,450 | 8,790 | 18,280 | 19,010 | 19,770 | 20,560 |
| - | 8,575 | 17,150 | 17,840 | 18,550 | 19,290 | 20,060 |
| 6,975 | 7,250 | 7,540 | 7,840 | 8,150 | 8,480 | 8,820 |
| 5,670 | 5,900 | 13,580 | 27,150 | 28,240 | 29,370 | 30,540 |
| - | - | - | - | - | - | - |
| \$ 98,495 | \$ 126,525 | \$ 170,385 | \$ 199,390 | \$ 207,380 | \$ 215,670 | \$ 224,260 |
| \$ 4,630 | \$ 5,090 | \$ 5,490 | \$ 5,710 | \$ 5,940 | \$ 6,180 | \$ 6,430 |
| 2,850 | 4,500 | 7,390 | 9,350 | 9,730 | 10,120 | 10,520 |
| \$ 7,480 | \$ 9,590 | \$ 12,880 | \$ 15,060 | \$ 15,670 | \$ 16,300 | \$ 16,950 |
| \$ 10,300 | \$ 10,600 | \$ 11,160 | \$ 11,610 | \$ 12,080 | \$ 12,560 | \$ 13,060 |
| - | - | 1,720 | 6,330 | 6,580 | 6,840 | 7,120 |
| \$ 10,300 | \$ 10,600 | \$ 12,880 | \$ 17,940 | \$ 18,660 | \$ 19,400 | \$ 20,180 |
| \$ 6,080 | \$ 6,440 | \$ 6,830 | \$ 7,240 | \$ 7,670 | \$ 8,130 | \$ 8,620 |
| 4,560 | 4,830 | 6,830 | 7,240 | 7,670 | 8,130 | 8,620 |
| - | - | 3,415 | 10,860 | 11,505 | 12,195 | 12,930 |
| \$ 10,640 | \$ 11,270 | \$ 17,075 | \$ 25,340 | \$ 26,845 | \$ 28,455 | \$ 30,170 |

| Note | 2003-2004 <i>actual</i> | 2004-2005 <i>actual</i> | 2005-2006 <i>budgeted</i> |
|---|----------------------------|----------------------------|------------------------------|
| 28. Professional Expenses - Minister | | \$ 5,435 | \$ 6,000 |
| 29. Professional Expenses - DRE | | 1,962 | 1,500 |
| Total Professional Expenses | | \$ 7,397 | \$ 7,500 |
| 30. Sabbatical Reserve | | | |
| TOTAL HUMAN RESOURCES | \$ 84,666 | \$ 101,824 | \$ 111,804 |
| OVERHEAD | | | |
| 31. Hyla/Playhouse Rent | \$ 7,369 | \$ 8,447 | \$ 18,500 |
| 32. Office Rent | 6,300 | 4,850 | 8,500 |
| 33. Insurance | 587 | 632 | 1,500 |
| 34. Administration | 3,341 | 5,081 | 7,185 |
| 35. Denominational Dues | 8,058 | 9,040 | 12,960 |
| 36. Settlement | 1,768 | - | - |
| 37. Debt Service, principal and interest | - | - | 5,300 |
| 38. Debt Service - land | - | - | - |
| 39. Debt Service - building construction | - | - | - |
| 40. Building Maintenance | - | - | - |
| 41. Utilities | - | - | - |
| 42. Building Depreciation | - | - | - |
| TOTAL OVERHEAD | \$ 27,423 | \$ 28,050 | \$ 53,945 |
| PROGRAMS | | | |
| 43. Adult Programs | \$ 333 | \$ 899 | \$ 2,345 |
| 44. Board Discretionary Funds | 2,341 | 1,121 | 500 |
| 45. Capital Campaign | | 1,056 | |
| 46. Childcare | 2,400 | 3,738 | 3,500 |
| 47. Religious Education | 3,600 | 2,990 | 5,000 |
| 48. Advertising & Communications | 3,300 | 4,469 | 3,600 |
| 49. Membership | 1,500 | 1,425 | 1,000 |
| 50. Minister's Discretionary Fund | | 80 | |
| 51. Ordination/Installation | | 3,643 | 2,000 |
| 52. Social Action | 302 | 888 | 675 |
| 53. Worship | 2,100 | 1,829 | 4,050 |
| 54. Music | 5,221 | 730 | 900 |
| 55. Sunday Set-up | 600 | 408 | 500 |
| 56. Pledge Drive | 2,094 | 1,932 | 2,500 |
| 57. Auction/Fundraising | 4,565 | 578 | 4,000 |
| TOTAL PROGRAMS | \$ 28,356 | \$ 25,786 | \$ 30,570 |
| <u>Total Operating Expense</u> | \$ 140,445 | \$ 155,660 | \$ 196,319 |
| <u>Net Operating Income (Deficit)</u> | \$ - | \$ (12,696) | \$ 5,071 |
| <u>Cumulative Net Operating Income (Deficit)</u> | \$ - | \$ (12,696) | \$ (7,625) |

| 2006-2007 <i>projected</i> | 2007-2008 <i>projected</i> | 2008-2009 <i>projected</i> | 2009-2010 <i>projected</i> | 2010-2011 <i>projected</i> | 2011-2012 <i>projected</i> | 2012-2013 <i>projected</i> |
|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| \$ 6,180 | \$ 6,370 | \$ 6,560 | \$ 6,760 | \$ 6,960 | \$ 7,170 | \$ 7,390 |
| 1,550 | 1,600 | 1,650 | 1,700 | 1,750 | 1,800 | 1,850 |
| \$ 7,730 | \$ 7,970 | \$ 8,210 | \$ 8,460 | \$ 8,710 | \$ 8,970 | \$ 9,240 |
| \$ 10,080 | \$ 11,080 | \$ 11,970 | \$ 12,450 | \$ 20,130 | \$ 20,930 | \$ 21,760 |
| \$ 144,725 | \$ 177,035 | \$ 233,400 | \$ 278,640 | \$ 297,395 | \$ 309,725 | \$ 322,560 |
| \$ 19,060 | \$ 19,630 | \$ 20,220 | \$ 20,830 | \$ 10,725 | \$ - | \$ - |
| 9,600 | 9,890 | 10,190 | 10,500 | 5,410 | - | - |
| 1,650 | 1,820 | 2,000 | 2,200 | 7,260 | 7,990 | 8,790 |
| 7,470 | 7,770 | 8,080 | 8,400 | 8,740 | 9,090 | 9,450 |
| 15,170 | 16,690 | 18,360 | 20,200 | 22,210 | 24,440 | 26,880 |
| - | - | - | - | - | - | - |
| - | - | - | - | - | - | - |
| - | - | - | - | - | - | - |
| - | - | - | - | 59,880 | 59,880 | 59,880 |
| - | - | - | - | 9,000 | 18,000 | 18,720 |
| - | - | - | - | 5,000 | 10,000 | 10,600 |
| - | - | - | - | 25,000 | 25,000 | 25,000 |
| \$ 52,950 | \$ 55,800 | \$ 58,850 | \$ 62,130 | \$ 153,225 | \$ 154,400 | \$ 159,320 |
| \$ 2,510 | \$ 2,690 | \$ 2,880 | \$ 3,080 | \$ 3,300 | \$ 3,530 | \$ 3,780 |
| 1,000 | 1,050 | 1,100 | 1,160 | 1,220 | 1,280 | 1,340 |
| 4,000 | 4,400 | 4,840 | 5,320 | 5,850 | 6,440 | 7,080 |
| 5,750 | 6,610 | 7,600 | 8,740 | 10,050 | 11,560 | 13,290 |
| 3,850 | 4,120 | 4,410 | 4,720 | 5,050 | 5,400 | 5,780 |
| 1,500 | 1,730 | 1,990 | 2,290 | 2,630 | 3,020 | 3,470 |
| 250 | 250 | 250 | 250 | 250 | 250 | 250 |
| - | - | - | - | - | - | - |
| 1,000 | 1,070 | 1,140 | 1,220 | 1,310 | 1,400 | 1,500 |
| 4,330 | 4,630 | 4,950 | 5,300 | 5,670 | 6,070 | 6,490 |
| 960 | 1,030 | 1,100 | 1,180 | 1,260 | 1,350 | 1,440 |
| 750 | 800 | 860 | 920 | 980 | 1,050 | 1,120 |
| 2,750 | 3,030 | 3,330 | 3,660 | 4,030 | 4,430 | 4,870 |
| 4,320 | 4,670 | 5,040 | 5,440 | 5,880 | 6,350 | 6,860 |
| \$ 32,970 | \$ 36,080 | \$ 39,490 | \$ 43,280 | \$ 47,480 | \$ 52,130 | \$ 57,270 |
| \$ 230,645 | \$ 268,915 | \$ 331,740 | \$ 384,050 | \$ 498,100 | \$ 516,255 | \$ 539,150 |
| \$ 1,755 | \$ 13,015 | \$ 11,080 | \$ 32,050 | \$ 8,720 | \$ 100,765 | \$ 213,610 |
| \$ (5,870) | \$ 7,145 | \$ 18,225 | \$ 50,275 | \$ 58,995 | \$ 159,760 | \$ 373,370 |

| Note | 2003-2004 <i>actual</i> | 2004-2005 <i>actual</i> | 2005-2006 <i>budgeted</i> |
|---|----------------------------|----------------------------|------------------------------|
| <u>Building Program</u> | | | |
| <u>Income</u> | | | |
| 58. Capital Campaign | \$ - | \$ - | \$ - |
| 59. Alan Peters Fund | 35,000 | 2,100 | 2,230 |
| 60. UUA Site Acquisition Program - loan | - | - | - |
| 61. UUA Site Acquisition Program - grant | - | - | - |
| 62. UUA First Home Grants | - | - | - |
| 63. Chalice Lighter Grants | - | - | - |
| 64. Site acquisition loan | - | - | - |
| 65. Building construction loan | - | - | - |
| <u>Total Building Program Income</u> | \$ 35,000 | \$ 2,100 | \$ 2,230 |
| <u>Cumulative Building Program Income</u> | \$ 35,000 | \$ 37,100 | \$ 39,330 |
| <u>Expense</u> | | | |
| <u>SITE ACQUISITION</u> | | | |
| 66. UUA portion of purchase price - two-thirds | \$ - | \$ - | \$ - |
| 67. CUUC portion of purchase price - one-third | - | - | - |
| 68. Pre-paid principal & interest, 50% of 7 years | - | - | - |
| 69. Environmental Assessment, 2% of loan | - | - | - |
| 70. Miscellaneous costs | - | - | - |
| 71. Principal Balance, due @ title transfer | - | - | - |
| 72. UUA Fund Raising Consultant | - | - | 15,000 |
| <u>BUILDING CONSTRUCTION</u> | | | |
| 73. Building construction cost - CUUC down payment | - | - | - |
| 74. Building construction cost - bank financed portion | - | - | - |
| 75. Financing costs - 3% | - | - | - |
| 76. Architecture Engineering & Permits | - | - | - |
| 77. Furnishings | - | - | - |
| 78. Moving costs | - | - | - |
| <u>TOTAL SITE & BUILDING</u> | \$ - | \$ - | \$ 15,000 |
| <u>Total Building Program Expense</u> | \$ - | \$ - | \$ 15,000 |
| <u>Cumulative Building Program Expense</u> | \$ - | \$ - | \$ 15,000 |
| <u>Net Building Program Income (Deficit)</u> | \$ 35,000 | \$ 2,100 | \$ (12,770) |
| <u>Cum Net Building Program Income (Deficit)</u> | \$ 35,000 | \$ 37,100 | \$ 24,330 |
| <u>GRAND TOTAL NET INCOME (DEFICIT)</u> | \$ 35,000 | \$ (10,596) | \$ (7,699) |
| <u>Cum Grand Total Net Income (Deficit)</u> | \$ 35,000 | \$ 24,404 | \$ 16,705 |

| 2006-2007 <i>projected</i> | 2007-2008 <i>projected</i> | 2008-2009 <i>projected</i> | 2009-2010 <i>projected</i> | 2010-2011 <i>projected</i> | 2011-2012 <i>projected</i> | 2012-2013 <i>projected</i> |
|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| \$ 320,380 | \$ 160,190 | \$ 160,190 | \$ - | \$ 738,000 | \$ 369,000 | \$ 369,000 |
| 1,460 | 1,550 | 1,640 | 1,740 | 1,840 | 1,950 | 2,070 |
| 400,000 | - | - | - | - | - | - |
| - | - | - | - | 101,780 | - | - |
| - | - | - | - | - | - | - |
| - | - | - | - | - | - | - |
| - | - | - | - | - | - | - |
| - | - | - | - | 750,000 | - | - |
| \$ 721,840 | \$ 161,740 | \$ 161,830 | \$ 1,740 | \$ 1,591,620 | \$ 370,950 | \$ 371,070 |
| \$ 761,170 | \$ 922,910 | \$ 1,084,740 | \$ 1,086,480 | \$ 2,678,100 | \$ 3,049,050 | \$ 3,420,120 |
| \$ 400,000 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| \$ 200,000 | - | - | - | - | - | - |
| 118,739 | - | - | - | - | - | - |
| 8,000 | - | - | - | - | - | - |
| 5,000 | - | - | - | - | - | - |
| - | - | - | - | 372,740 | - | - |
| - | - | - | - | - | - | - |
| - | - | - | - | 500,000 | - | - |
| - | - | - | - | 750,000 | - | - |
| - | - | - | - | 22,500 | - | - |
| - | - | 25,000 | 125,000 | - | - | - |
| - | - | - | - | 150,000 | - | - |
| - | - | - | - | 10,000 | - | - |
| \$ 731,739 | \$ - | \$ 25,000 | \$ 125,000 | \$ 1,805,240 | \$ - | \$ - |
| \$ 731,739 | \$ - | \$ 25,000 | \$ 125,000 | \$ 1,805,240 | \$ - | \$ - |
| \$ 746,739 | \$ 746,739 | \$ 771,739 | \$ 896,739 | \$ 2,701,979 | \$ 2,701,979 | \$ 2,701,979 |
| \$ (9,899) | \$ 161,740 | \$ 136,830 | \$ (123,260) | \$ (213,620) | \$ 370,950 | \$ 371,070 |
| \$ 14,431 | \$ 176,171 | \$ 313,001 | \$ 189,741 | \$ (23,879) | \$ 347,071 | \$ 718,141 |
| \$ (8,144) | \$ 174,755 | \$ 147,910 | \$ (91,210) | \$ (204,900) | \$ 471,715 | \$ 584,680 |
| \$ 8,561 | \$ 183,316 | \$ 331,226 | \$ 240,016 | \$ 35,116 | \$ 506,831 | \$ 1,091,511 |

B. Notes to Financial Forecast

Membership Statistics

1. Membership has grown from 57 in 1996 to 156 reported in February 2005, for an annualized growth rate of 13.4% over 8 years. In passing our 2005-06 budget, the Congregation assumed that 30 new members would join during the year. Thereafter, a 10% annual rate of membership growth is projected. This assumption is conservative; in all likelihood our growth will match or exceed our historical growth rate, especially now that we have moved into larger temporary space at the Playhouse.
2. Since 2001-02, children and youth enrollment in the Religious Education program has grown at an annualized rate of 14.7%. Over the 8-year planning period we assume that growth in RE enrollment will match that of adult membership.
3. Pledge units historically have been 59% to 62% of the number of members. We've used 60% here.
4. Per-member pledges have grown from \$291 in 1996 to \$739 in 2004-05. That's an annualized growth rate of 12.3%. Looking ahead, we project 12% growth in per-member pledging.

Income

5. Pledges are calculated by multiplying the number of members by the pledge per member.
6. Average Sunday offering has gradually risen from \$18 per member per year in 1997 to \$37 in 2003-04. It dropped off to \$35 in 2004-05. Total Sunday offering (excluding special collections) anticipated for 2005-06 was budgeted at \$5,500, and is projected to grow 10% per year thereafter.
7. UUA subsidies for extension ministry and RE will end after 2005-06.
8. Gross fundraising collection before expense. Auction was not held in 2004-2005. Auction plus 2 other fundraisers (teeshirt sales, art fair) will be held in 2005-06; the Congregation-approved budget assumes \$23,700 total gross receipts. Based on the assumption of increased membership and hence increased participation in fundraising, including an annual auction, a 10% annual increase in receipts is assumed.
9. Contributions from friends have varied randomly over the years, within a range of \$800 to \$5,000. On the assumption that the number of friends, and their contributions, will increase at a lesser rate than that of members, we project total contributions from friends to increase at five percent per year.

10. Program Income: \$1,250 budgeted for 05-06; assume 15% growth per year. Includes gross income from all programs.
11. Transfers from restricted funds to operating budgets for specific purposes. One such transfer occurred in 2003-04; none are projected to occur in future.
12. Other Income: In 2004-05 this included \$577 miscellaneous income, \$150 other income, and a \$5,000 PNUU Growth Foundation loan that must be repaid in 2005-06.

Expense

Human Resources

Salary

13. Minister's compensation is designed to comply with the UUA Fair Compensation Guidelines. Specifically, our salary-plus-housing target is the mid range of Geo Index 5, Mid Sized 1 Congregation (150-249 members; \$71,800) by July 2008 (membership projection: 248). Thereafter, salary-plus-housing is projected to grow at 4% per year and will reach the midrange of Mid Sized 2 (250-499 members; \$83,700) by July 2012.
14. Intern Minister's compensation is based on the UUA recommendation for Assistant Minister in Geo 5, midsize 1, mid range @ 1/4 time. Use $1/4 * 46,900 = \$11,725$ starting in 08-09 and increase by 4% annually thereafter.
15. Currently, Director of Religious Education (DRE) is at half time and 99.4% of the UUA Fair Compensation minimum for a non-credentialed religious educator in Geo Index 5, Mid Sized 1 Congregation. Plan to increase to three-quarter time on 100% of UUA minimum basis in 2006-07; three quarter time on UUA midrange basis in 07-08; then to full time and mid range basis by 2008-09 (\$39,800). Thereafter, salary is projected to grow at 4% annual rate to reach the midrange of Mid Sized 2 (\$46,300) by July 2012.
16. In 2007-08, add 1/4 time Assistant DRE at a quarter of the mid-size 1 minimum salary ($1/4 * 33,800 = \$8,450$). Position will increase to half time in 2009-10 (\$18,280) and will be adjusted upward by 4% annually thereafter.
17. Choir Director, starting at one-quarter time in 2007-08, increasing to half time in 2008-09 thereafter. Based on the UUA recommendation for Choir Director, start with ($1/4 * 34,300 = \$8,575$), doubled for 08-09 and increased by 4% annually thereafter.
18. Accompanist, quarter time: Assume 1/4 time is sufficient for Sunday services plus one rehearsal weekly. Based on UUA recommendation for

Organist, use ($1/4 * 27,900 = \$6,975$) starting in 06-07, increasing by 4% thereafter.

19. Office Administrator/Bookkeeper: Currently, the office administrator and bookkeeper positions are filled on a volunteer basis. Budget in 2005-06 is for part time administrative help. Continue this practice for 06-07 and 07-08. Assume $1/4$ time paid position in 2008-09; $1/2$ time thereafter. Salary figures are based on UUA recommendation of \$54,300 for the position of Business Administrator.
20. Bookkeeper: See above.

Payroll Taxes

21. Minister's payroll taxes are in fact a payment to the minister "in lieu of employer's FICA" per UUA guidelines. In 2005-06, this payment is in the amount of one quarter of the full 15.3% of salary plus housing that the minister is obligated to pay for combined Social Security and Medicare (FICA) taxes. Beginning in 2006-07 the payment is $1/2$ of 15.3%, as recommended by UUA.
22. Other Staff: Payroll taxes are 7.5% of salary

Pension

23. Minister and DRE: UUA recommends 10% of salary plus housing to be paid into a qualified retirement plan. Employees may make additional voluntary contributions up to the US federal limits. In 2005-06 Cedars is contributing 14% on behalf of the minister and DRE to the UUA Retirement Plan managed by Fidelity Investments. We have been contributing 14% per the old UUA guidelines, created when the pension plan had no provision for employee contributions. Now that employee contributions are allowed, we plan to reduce the pension contribution percentage incrementally, holding the dollar amount nearly constant each year until we reach the 10% level. This occurs as follows: 14% in 2005-06; 12% in 2006-07; 11% in 2007-08; 10% in 2008-09.
24. Other Staff: UUA requires pension enrollment of at least 70% of eligible employees, defined as persons age 21 or older who work at least 1,000 per calendar year (half-time), and who have been employed for one year. Previous employment with the same or another UU organization meets the one-year requirement. UUA recommends 10% of salary plus housing to be paid into a qualified retirement plan. Employees may make additional voluntary contributions up to the US federal limits. Pension contributions of 10% are made for all half-time or greater employees as follows:
 - a. For Choir Director, half-time commencing in 2008-09;

- b. For Office Administrator/Bookkeeper, half-time commencing in 2009-10;
- c. For Assistant DRE, half time commencing in 2009-10.

Benefits

- 25. Minister: Insurance benefits include health, disability, dental, and life. The 2005-06 budget is \$5,740; costs are projected to increase 6% annually thereafter.
- 26. DRE: Starting in 06-07, same benefits as for minister, prorated to $\frac{3}{4}$ time for 06-07 & 07-08.
- 27. Other Staff: Starting in 06-07, same benefits as for minister for all staff half time and greater, prorated respectively.

Professional Expenses

- 28. Minister's professional expenses are \$6,000 in 05-06, increasing by 3% per year thereafter.
- 29. DRE's professional expenses are \$1,500 in 05-06, increasing by 3% per year thereafter.

Sabbatical Reserve

- 30. UUA recommends that one month of sabbatical leave should be provided for each year of service for full-time religious professionals (for Cedars, eligible religious professionals are the minister effective 2003-04 and DRE effective 2008-09). Professionals are typically eligible for sabbatical leave after five to seven years of service, with the requirement that they return for at least one full year of employment following. During the sabbatical the professional will receive full compensation and benefits. We plan to accrue a reserve account to provide replacement ministerial services during the sabbatical period. Beginning in 2006-07 through 2009-10, the sabbatical reserve accrues at one-sixth of the minister's salary plus housing allowance. Thereafter it accrues at one-sixth the combined DRE's salary plus the minister's salary plus housing.

Overhead

- 31. Hyla/BPA Rent: Increase in 05-06 reflects move into new interim space at The Playhouse. A 3% increase in rent is calculated thereafter, through 2009-10. In 2010-11 we will move into our new church that we own; assume $\frac{1}{2}$ year's rent.
- 32. Office Rent: Increase in 05-06 reflects new office space in the Sterling Building at \$800 per month projected for 10 months of 2005-2006 and

all of 2006-07. Rent increase of 3% every year thereafter, through 2009-10. In 2010-11 we will move into office space in our own church building; assume ½ year's rent.

33. Insurance increase in 2005-06 reflects increase in liability coverage as a condition of our rental agreement with BPA. Since insurance rates are generally going up faster than inflation, a 10% annual increase is included thereafter. In 2010-11, insurance is increased by a factor of 3 to reflect ownership of our own building.
34. Administration costs increase 4% cost per year.
35. Denominational dues: Cedars UU Church is an Annual Fund Program Fair Share congregation. Dues are per member per annum and consist of dues paid to the Unitarian Universalist Association, Pacific Northwest District, and the local Interfaith Council. In 2005-06 actual dues are \$10,584 based on our official reported membership count of 147 and per-member rates of: UUA \$51; PNWD \$20; IFC \$1. (Actual dues in 05-06 are less than the budgeted amount of \$12,960.) In future years, total dues are based on a per-member rate that increases by 3% per year, times the membership count.
36. Settlement: This is the moving expense for Drew. Since we called Drew to be our permanent settled minister, this line is \$0 for all years.
37. Debt service in 05-06 repays principal and interest for a loan taken in 04-05.
38. Debt service – land: If Cedars qualifies for and participates in the UUA Site Acquisition program, there will be no need to finance the purchase of land.
39. Debt service – building: Annual principal and interest payments on a hypothetical construction loan. Assume \$1,250,000 total construction cost, \$750,000 principal, \$500,000 down, 30-year term at 7% interest.
40. Building maintenance: Assume \$1,000 per month for janitorial service and supplies, plus \$500 per month for miscellaneous repairs. Assume 6 months occupancy in the first year. Increase at 4% annually after the first full year.
41. Utilities: Assume \$750/month for power & light, water, and sewer. Assume 6 months occupancy in the first year. Increase at 4% annually after the first full year.
42. Building depreciation: University Unitarian Church recommends setting aside at least 2% of equity value annually to finance depreciation replacement.

Programs

Program expenses reflect the total cost of providing programs. Program income flows to the general operating fund and is reflected in the income portion of the financial plan.

43. Adult Programs: Expenses increase at 7% per year.
44. Board Discretionary Fund: Increase to \$1,000 in 06-07, assume 5% annual growth thereafter.
45. Capital Campaign: Costs in 2004-05 were for UUA Fund Raising Consultant Assessment Visit. Future costs associated with the capital campaigns will be covered by the Alan Peters Fund rather than by the operating budget.
46. Childcare: After an initial jump to \$4,000 in 06-07, increase 10% per year to match projected growth in number of children.
47. Religious Education: Increase 15% per year. Goal is not only to keep pace with growth in number of children, but also to improve the quality of the program.
48. Advertising & Communications: Increase 7% per year.
49. Membership: After an initial jump to \$1,500 in 06-07, increase 15% per year. Goal is not only to keep pace with growth in membership, but also to improve the quality of programs to attract and retain members.
50. Minister's Discretionary Fund: Current balance is approximately \$1,000. Add funds as needed to maintain balance. Assume \$250 per year.
51. Ordination/Installation: Budget \$2,000 in 2005-06 for Drew's ordination.
52. Social Action: After an initial jump to \$1,000 in 06-07, increase 7% per year.
53. Worship: Increase 7% per year.
54. Music: Increase 7% per year.
55. Sunday Set-up: After an initial jump to \$1,000 in 06-07, increase 7% per year.
56. Pledge Drive: Increase 10% per year to keep pace with membership growth.
57. Auction/Fundraising: Increase 8% per year.

Building Program

This Comprehensive Plan anticipates that Cedars UU Church will acquire land and build a church building. It is expected that this will occur in two phases: first, acquire the land, and then, within five years, build the building.

This Plan assumes that CUUC will participate in the UUA Site Acquisition Program. The Program provides a means for congregations such as ours to more easily acquire land on which to build a new church. Details are contained in the document "Unitarian Universalist Association Site Acquisition Program" dated April 15, 2005, and subsequent clarifying emails between CUUC and the UUA Fund Raising Consultant.

This Plan assumes that CUUC will secure a commercial construction loan to build the building. Alternative financing that may be available through the UUA has yet to be identified.

The Site Acquisition and Building Construction phases of the work will be supported by two capital campaigns: one conducted in 2006 and the other in 2010.

Under the Site Acquisition Program, the UUA will provide financial assistance in the form of a loan and a grant. The loan is in the amount of two-thirds of the purchase price, with a term of seven years and amortization of principal over 25 years. The grant is in the amount of one-half of seven years' worth of principal and interest. The UUA will hold title to the land from the time of initial acquisition until we can pay the outstanding loan balance, up to a maximum of five years.

At the time of the initial acquisition, CUUC must contribute a cash payment representing:

- One-third of the purchase price;
- Prepayment of one-half of seven years' worth of principal and interest;
- Two percent of the loan amount to cover the cost of a Phase One Environmental Study plus processing and closing costs;
- Legal fees;
- Any unusual site management costs.

At the time of title transfer (within five years) CUUC must pay the outstanding loan balance, net a credit for the remainder of seven years' worth of principal and interest. The credit consists of:

- The remainder of the UUA grant of one-half of seven year's worth of principal and interest;
- The remainder of CUUC's prepayment of one-half of seven year's worth of principal and interest.

Income and expense items detailed below are based on the following assumptions:

- Purchase price of land is \$600,000.
- CUUC takes title to land at 4 years.
- Total cost of building construction is \$1,250,000.

Building Program Income

58. Capital Campaigns: Per UUA Fund Raising Consultant, capital campaign pledges typically total 4 to 7 times the most recent annual stewardship pledge amount. Assume a capital campaign in 2006 resulting in capital pledges at 4 times the 2005-06 stewardship pledge level. Capital pledges are collected over three years; assume 50% of the total collected in the first year and 25% in each of the following two years. The second capital campaign, to fund building construction, occurs in 2010, again conservatively netting 4 times the prior year's pledging level, and collected 50/25/25 as before.
59. Alan Peters Fund: In 2003-04 the Alan Peters Building Fund contained \$35,000; the next year it had grown by \$2,100 or 6%. Assume continued growth at 6%. However, in 2005-06, \$15,000 of the principal will be used to pay for the UUA Fund Raising Consultant and other costs to conduct a financial feasibility study, help us plan and execute our capital campaign, and guide us through the Site Acquisition Program. Hence income is reduced in later years.
60. UUA Site Acquisition Program – loan: The UUA will provide a loan for 2/3 of the purchase price of land. Assuming a \$600,000 purchase of land, the loan amount is \$400,000. Assume 7% interest, other terms as specified by UUA (see above).
61. UUA Site Acquisition Program – grant: Assuming title transfer at 4 years (2010-11), the grant is in the amount of the remaining 3 years of principal and interest, one-half paid by UUA and one-half prepaid by CUUC.
62. UUA First Home grants: None have been identified at this time. CUUC will actively pursue all available grant funding for building construction. This will be the responsibility of a newly reconstituted Finance Committee.
63. Chalice Lighter grants: Eligibility not identified at this time. CUUC will actively pursue all available grant funding. This will be the responsibility of a newly reconstituted Finance Committee.
64. Site Acquisition loan: Not used in this Plan. Instead, we plan to take advantage of the UUA Site Acquisition Program.
65. Building Construction loan: In 2010-11 we plan to begin construction of our new church building. Assume building construction cost is \$1,250,000, of which \$750,000 will be financed through a commercially available construction loan. Assumed terms: 30 years, 7% interest.

Building Program Expense

Site Acquisition

66. Purchase price, UUA portion: \$400,000 as discussed above.
67. Purchase price, CUUC portion: \$200,000 as discussed above.
68. Prepaid principal & interest: \$118,739, equal to 50% of 7 years of principal and interest based on 25 year term, assume 7% interest.
69. Environmental Assessment, processing and closing costs: \$8,000, equal to 2% of loan amount.
70. Miscellaneous costs: Assume \$5,000 for legal and other fees.
71. Principal balance due at title transfer: \$372,740, principal balance remaining at 4 years.
72. UUA Fund Raising Consultant: Estimated cost \$15,000 to conduct a financial feasibility study, help us plan and execute our capital campaign, and guide us through the Site Acquisition Program.

Building Construction

73. Building construction cost - down payment: Assume \$1,250,000 building construction cost. Assume CUUC pays \$500,000 down from capital campaign income.
74. Building construction cost - bank financing: Commercial construction loan, \$750,000 principal, 30-year term at 7% interest. UUA grants and/or loans may be available in lieu of all or part of commercial financing.
75. Financing costs: assume 3% of loan amount for up-front costs associated with securing the construction loan.
76. Architecture, Engineering, and Permits: A&E is typically 10% of building construction cost. Assume another 2% for permits. Assume preliminary design occurs in 2008-09, detailed design and permits in 09-10.
77. Furnishings: Assume \$150,000 to purchase pews, chairs, altar, classroom furnishings, kitchen equipment, office furniture & equipment, artwork.
78. Moving costs: Assume \$10,000 to move what little we own into the new building.