

# Notes from Strategic Planning Consultation Session May 28<sup>th</sup>, 2017

## Strategic Priority 2: ENHANCING LONGTERM SUSTAINABILITY OF THE FIRST UNITARIAN CHURCH OF VICTORIA

### *In attendance*

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### **PART A**

For each area of focus (Membership, Leadership/Administration, Finance/Fund Development & Building and Grounds) participants we asked to brainstorm on the topic from each of the following perspectives;



1. **YELLOW HAT THINKING** - focuses on the *positives*. What is working well? What can we build on? What do we want to keep? What are the opportunities?



2. **RED HAT THINKING** - focuses on *feelings*. How do I feel about this? What do I like about these feelings/ what don't I like about these feelings?



3. **WHITE HAT THINKING** - focuses on *facts*. What facts do we have already? Where can we get this information? What do we need to find out? How can we get this information?



4. **GREEN HAT THINKING** - focuses on *creativity*. What new ideas are possible? What are my ideas? How can things be changed or improved?



5. **BLACK HAT THINKING** - focuses on *cautions/risks*. What problems could arise? What are the potential threats?

*What follows is list of the thoughts and ideas generated through the brainstorming process for each area of focus. As the process demands the ideas were not edited or evaluated.*

## **A. MEMBERSHIP**



### **WHITE HAT- FACTS**

- Approx. 300 members stable
- Have we really remained stable??
- We need inform from data base to look at demographics
  - Age
  - Children in RE
  - Average age
  - Median age
- We need to review population and projected growth for regions of Greater Vitoria - available from VIHA planning site
- We need to review info and resources from CUC and UUA about membership and growth
- 0.1% of population UU? How do we find out/confirm. CENSUS Boston
- Unchurched region
- Paul Bramadat's CENSUS and other data resources for Greater Victoria and spirituality
- Most of membership over 70!
- Mainly Caucasian membership
- 3:1 female to male f membership (ck)

- Our children, youth and families are not consistent in attendance. Why?
- Humanists. Are we keeping them? Honouring them?
- RE Friends



### **YELLOW HAT- POSITIVES**

- Build on website
- Circle Dinners
- Small Spiritual Groups
- Music program brings members
- Some people have a slower to join in style
- What is our motion of a “good member?” - hills and valleys
- Neighbourhood groups - some givers vs “needies”
- OWL program
- Ministers - opportunity for more coordinated outreach
- We need a volunteer coordinator - paid or volunteer
- We are welcome of some diversity in membership
- Committee work
- Coffee Hour
- Opportunities
  - RE attracts members
  - Find out what people are seeking
- Good Initial Welcome process for membership
  - Well defined process for membership
  - Young families are attracted to our church



### **BLACK HAT THINKING - CAUTION/RISKS**

- Buddy system need evaluation
- After the new member ceremony ...then what? (membership committee -> 2 years)
- Greater Society “unchurched”
- Church not considered “necessary”
- Costs of church: transportation to donation
- Rise in members age
- Are millennial’s less motivated for spiritual search?
- People show up on Sunday and not returning - need more information why?
- Many demands on family time - both parents working
- Loneliness
- Reluctant to commit
- Transportation - we aren’t a neighbourhood church
- Location is a barrier
- Lack of UU awareness or understanding in general (no evangelical zeal)
- Poor ride sharing coordination
- Care and concern does not serve all - e.g. Care Homes
- Are membership classes deterring members? Evaluate?
- Many new kinds of spiritual expression
- Coffee hour too crowded to be inclusive



### **RED HAT - FEELINGS**

- Unclear what a “member” is
- Uncomfortable about a perceived push to get new members, more money, more committees
- Sad when a long term member felt ignored in favour of new members

- Glad when room is full on Sunday
- Sad about feeling excluded as a new member
- Proud of minister
- We ignore greater community
- Concern re: numbers in RE program
- Sad/mad about lack of diversity
- Can feel “cliquey”



### ***GREEN HAT THINKING - CREATIVITY***

- Open houses
- Follow up with members not seen in awhile
- More fun - a cultural event for community
- View membership differently
- Celebrate current members - heart, hearth and warmth
- Satellite services - Sooke, Western Communities Downtown at different times of week, fellowships, cathedral church
- Big picture of UU-ism in CRD - share our good news
- More use of social media
- Community Engagement - indigenous fests, more outreach sharing /best practices
- Start buddy systems (adults) earlier
- Encourage us to talk to new people - profiling famous/infamous UU's
- Reactivate circle dinners , new format
- “messy church” events
- Seniors housing project
- Create more options for connections
- Offering a CUUP - convent of Unitarian Universalists Pagans

**END OF MEMBERSHIP SECTION**

## **B. ADMINISTRATION AND LEADERSHIP**



### ***WHITE HAT- FACTS***

- Many volunteers
- Over volunteered - feel burnt out
- List of volunteers in directory
- ? length of stay of ministers
- ?welfare of our staff - good
- What is workload for office staff
- ?need more staff
- \* HR plan working toward fair wage
- ? is compensation fair and adequate
- Many staff members



### ***YELLOW HAT- POSITIVES***

- Shared ministry team
- Buddy system
- Great ministers
- Nadia, Sarah and Faye are great
- Great RE
- Excellent leadership and experience in church
- Good music program
- Good board
- Opportunity for personal growth as worship associate
- Lay chaplaincy , increase this
- Increase Volunteering opportunities

- Children program
- Connections with UVIC
- Good relationship with Capital



### ***BLACK HAT THINKING - CAUTION/RISKS***

- Need youth/young adults programmer
- Overuse of ministers - burnout potential
- Too many captains, poor team leadership
- Need to provide church leaders with tools/training
- Lack of coordination and communication
- Danger of silos
- Burnout ++7lack of big picture direction
- Risk of over attachment to ministers
- Risk of over attachment to choir
- Risk of over attachment to other groups
- Too much \$ on a particular area (anything) needs balance among areas with \$ and energy
- Budget does not necessarily reflect priorities
- Reluctance to volunteer
- Getting authority
- How many read communications that are put out
- Better just in time communication availability



### ***RED HAT - FEELINGS***

- Lots of volunteers
- Always bust, positive energy at church
- Gratitude and admiration

- Feeling good due to increased role models
- Grateful to care and concern role on congregational care
- Anxiety about the time and energy required by ministers to supervise staff
- Feeling left out because not asked to take on a responsible position
- Impatient with some tasks done by office staff need a second look
- Anxiety about asking for ministers help because they are so busy
- Pressure to do stuff



### ***GREEN HAT THINKING - CREATIVITY***

- Volunteer coordinator required
- Reach out to new people to volunteer
- Better welcome to new people
- Better communication between leaders
- Interfaith cross-pollination
- Sabbatical pastoral team continue after sabbatical is over
- No order of service needed
- More opportunity for 1 shot, time limited events
- More use of website for information i.e. secure link just for members
- Increase use of social media

## **END OF LEADERSHIP AND ADMINISTRATION SECTION**

### **C. FINANCE AND FUND DEVELOPMENT**



### ***WHITE HAT- FACTS***

- Know pledge total
- Know budget total
- We need analysis of pledges (age, #, inflation, ? incomes (up or down))



- Shortfalls in budget and pledges
- Alternate sources of income
- Find out about grants
- People being “friends “ \$ to CUC (Do we know this is true?)
- Charitable status
- How are investments?
- ?Paying down mortgage
- Why do people pledge what they do e.g. survey monkey
- Increase endowment fund and planned giving
- Limited knowledge re endowment fund and planned giving
- ?funds that are bequeathed - terms
- Need Long term forecasts and points of risk



### ***YELLOW HAT- POSITIVES***

- Pledges on schedule this year
- Good finance and ABC committee - good promotion
- Current finance committee and volunteer treasurer
- Money in the bank
- Successful find raising - services auction, book sale
- Using UU resources
- Services Auction and Book Sale
- Congregation members really care
- Working towards “living wage” and fair compensation standards for staff
- Research what is working for other groups
- Build on/ promote outside rentals
- Encourage legacy
- Build on membership
- Pay off mortgage

- Generous support for refugee projects
- Don't pay off mortgage - leave money in the bank for reserve
- Explore what works with other churches
- Greater accountability for expenditures
- We have the best ever accountability for expenditures
- Build up endowment fund



### ***BLACK HAT THINKING - CAUTION/RISKS***

- Recent death/departures of major donors
- Economic downturn
- Increase costs for energy/hydro
- Changes in leadership
- Economic reality -impoverished/unstable finances
- Escalating costs - building maintenance, CUC
- Too many special projects “splitting” the dollars available for pledging?
- Increasing difficulty getting here - some don't have cars
- Aging membership
- Lack of agreement on spending priorities
- Need deeper understanding of the shared burden of congregational sustainability
- Decreasing religiosity in BC (57% report not being religious)
- No/poor public transportation to the church
- Loss of ministers
- Poor ride sharing plan, make it a neighbourhood initiative
- We behave richer than we are/living beyond our means
- Lack of funds for unexpected emergencies
- Mortgage rates
- Insurance sufficient?
- High costs for housing and child care for young families

- Individual donours placing restrictions on the use of their donation to a special project



### **RED HAT - FEELINGS**

- Feeling hopeless and hate the feeling
- Talking about money - private ....but needed
- Excluded -> pressure to contribute at every event
- Building is an albatross
- ABC makes me nervous
- Hopeful
- Sad young families feel pressure
- How we approach people about money is important
- We will survive
- Grateful for planners
- Concerned about head in sand financial planning ...aging demographics
- Nervous we behave in a privileged way and we are always asking for money
- Good feeling about no evaluation with Mafia or other laundry practices???? HUH??
- Concerned re lack of understanding re” cost of running FUCV
- Concern re decreased appreciation of building and property (value of)
- Concern not enough understanding of traditional financial statement
- Appreciate budget team has provided \$ talk in plain language ++



### **GREEN HAT THINKING - CREATIVITY**

- Legacy development
- What can we do less of ++
- Increase rentals++
- Work towards “living wage” and fair compensation standards for staff
- Sell property

- Expanding our language to affirm and welcome economic diversity. “ by donation” instead if fee e.g. coffee hour donation basket instead of charging for mortgage cakes
- Talk about pledges in terms of % of income instead of amounts
- Work on attitudes about money
- Future of capitalism - big changes coming
- More upfront talk about stewardship and responsibility
- Discussion and forums on budget planning to increase communication and understanding

## END OF FINANCE SECTION

### **D. BUILDING AND GROUNDS**



#### ***WHITE HAT- FACTS***

- We have 5 acres of land
- We have sanctuary and farmhouse
- Property fund = \$15,000 and donations
- Revenue rentals
  - Farmhouse
  - Island Montessori
  - Choirs
  - Karate
  - CISV
  - Weddings
- Mortgage is \$120,000
- Maintenance in \$10,000 annually
- \* see annual report
  - Long term costs/expenses
  - Average 20K / annum to manage property

- Depreciation report looks good
- Need clarification on zoning use by building
- ?heat pump on last legs - other risks
- ? way to bring costs down
- Explore rental vs ownership
- Aging gardening committee



### ***YELLOW HAT- POSITIVES***

- Rentals
- Development - sell them
- New and more initiatives (garden, yurt, memorial wall)
- Pro-active
- Planning and management
- Grounds are an asset
- Long range plan of 30 year expenditures
- Volunteer pool of gardeners and grounds keepers
- Space
- Education and awareness of property maintenance needs
- Earl's farm working well- Gardens – produce food \$ fundraiser, shared
- Long term maintenance schedule
- Promote labyrinth
- Provide rental space for community organizations



### ***BLACK HAT THINKING - CAUTION/RISKS***

- Remoteness of building site++
- Underestimating future capital expenditures and maintenance costs of aging building
- Financial Costs

- Mortgage rates
- Interest
- Insurance
- Environmental/Geological Assessment needed - flood and fire
- Earthquakes- seismic analysis needed
- We are over invested in buildings
- Poor night lighting
- No public transportation
- Can we continue to maintain without significant financial growth?
- When budget is tight this is first area cut
- People not aware of scope of work to maintain building and grounds
- Underused buildings/more rentals required
- Children fire drill risky
- Human capital - need more volunteers to maintain
- Well water/water supply/septic tank
- Fire risks - fire department awareness/advice
- Firewall



### **RED HAT - FEELINGS**

- Reassured/relieved we have plans and knowledge
- Gratitude to Earl's team
- Anxiety re: risks and gaps (fire, volunteer pool)
- Love the deck and the garden and tea
- Worries about aging demographics and ability to care for building
- Mixed feelings, love the property but needs to be better utilized
- Concerned re long term vs. short term
- Impatient nothing ever changes
- Excited re potential changes

- Opportunities
- Proactive
- Mentoring
- Renting garden



### ***GREEN HAT THINKING - CREATIVITY***

- market as an event centre - create marketing package
- Decrease environmental impact -solar panels
- Sell the farmhouse to Nickel brothers
- Develop the basement
- Host summer camp here
- Build relationship with Glendale Gardens - courses
- Advertise our Xmas services to broader community
- Market sanctuary for music
- Blinds needed for sanctuary
- Mentoring grounds crew - teens and tractors
- Finance committee rental of garden plots, other spaces
- Dialogue with other churches e.g. nonviolent communication , anti-racism
- Lobby for better bus service
- Offer cooking courses in our kitchens
- Marketing
- Room for building a canoe to entice youth and young adults
- Develop care home for older people on property
- Lesson, long-term planning
- Rezone property for other uses
- Dialogue with other religious communities to build relationships/consider sharing space
- Communicate with congregation about what it takes to run and manage property
  - Volunteer hours log what's involved

- Tell the stories

## END OF BUILDING AND GROUNDS SECTION

### PART B

#### FOCUSSED QUESTION

Participants we asked to consider ideas to answer the following question; “*What new ways can we explore to increase revenue other than increasing pledges?*” the first round each individual identified their ideas. In round 2 participants worked in pairs to share and explore ideas. For round 3 groups of 4 worked together to share and develop ideas. What follows is an unedited, random list of ideas for consideration.

- Discover if we are not doing things because of money and promote as special purpose fundraising/Fundraising dedicated to special project
- Use property differently - e.g. building mini-houses for purchase
- Rent kitchen for cooking classes
- Hire a marketing coordinator to market the site for events and provide onsite support
- Sell the building, invest and rent space to increase programming and outreach
- Clarify our view of begin in community. Explore congregation without walls
- Advertise in the yellow pages, online, paper etc.
- Share space with another Faith
- Book sale 2x per year
- Share our inside and outside space more
- Market site as retreat centre
- Hire a professional rental coordinator and give clear vision and goals
- Outreach program for the community - never sell the building
- A mini-house on site for an air b and b
- Sell plaque in orchard for fruit trees
- UU brew with apples etc.
- Use site for photography school
- Make a formal art gallery, Expand on art and sales
- Share space with another church - Fairfield united is looking



- Apply for grants
- Increase legacy funding
- Rezone to sell part of property for housing

**END OF DOCUMENT**