

Unitarian Universalist Fellowship of Los Gatos Long Range Plan For Fiscal Years 2008 to 2012

Introduction

UUFLG Long Range Planning:

The first UUFLG Long Range Plan was prepared in 1990 as a means of ensuring the expansion of our building (finished in 1992). Bob Bixler was a member of this planning team and provided a perspective of that time. Objectives outlined in that plan were essentially complete in 1994.

In 2005 the UUFLG was in the process of finding a settled minister, and it became obvious that a new long range plan was necessary. In January 2006, a committee was formed and this document/plan is the results of the work of this committee.

The members of the committee are:

- Long Range Planning Committee (LRPC)
Members are:
 - Bob Bixler, member since 1964
 - Harry Campbell, member since 1974
 - Linda Krenicky, member since 2004
 - Katie Rall, member since 1982
 - Jim Stahl, member since 2006
- In November of 2007 our new settled Minister, Victoria Ingram, joined our Committee.



The LRPC committee studied the plans of about 15 other UU churches and fellowships before embarking on development of this plan. We decided to use the UUFLG Mission Statement (crafted and approved by the membership in 1995) as a guide for the plan. After review we settled on three plan headings derived from the Mission Statement and added Growth as a fourth.

UUFLG Mission Statement

PLACE – Provide a place where people are inspired to think about and discuss values, ethics, and meaning of their lives.

SPIRITUAL GROWTH – Stimulate spiritual growth in children and adults through exposure to a wide variety of religious thought and experience.

MUTUAL SUPPORT – Provide mutual support, caring and fellowship to our members.

COMMUNITY SUPPORT – Provide support of the larger community through service and social action.

CONNECTEDNESS – Appreciate and honor our connectedness with all living things.

In addition, the LRPC cooperated with the Settled Minister Search Committee to sponsor a member survey and a series of Cottage Meetings (directed discussion groups.) The following is an excerpt from the resulting report. The full report is available on the UUFLG web-site and in hard copy at the UUFLG.

“The Settled Minister Search Committee and the Long Range Planning Committee are embarked on activities that are very important to the future of our Fellowship. Neither committee can be successful without a thorough understanding of the needs and desires of the congregation. There have been two means implemented in order to gain that understanding. A comprehensive survey was designed and responses solicited from every member and friend of the Fellowship. In addition to the survey, eight ‘Cottage Meetings’ were held to obtain opinions from members and friends about specific questions related to our Fellowship directions. The ‘Cottage Meetings’ were interactive discussion groups with a few pre-planned target topics and were open to all members and friends of the Fellowship. Although there were pre-planned topics, discussions were open to any topic the groups wished to introduce. The survey asked for individual answers and evaluations in a multiple-choice and ratings question format. The survey was made available for responses on the Internet as well as by hard copy. Combined, the ‘Cottage Meetings’ and survey provided the committees with advice and insight from over 75% of the congregation.”

We tried to keep this plan simple, flexible (to be updated at least once per year) and comprehensible. In addition we made several interim presentations to the membership to keep them apprised of our progress and to solicit feedback.

The UUFLG board was provided interim copies of the plan for review and comment by all UUFLG committees. Many of the items in the plan have been started, and a few have already been completed.

Please note that the Long Range Planning Committee has decided to not spell out dates in detail. Rather we specify a target end date for each task/subtask and leave that detail of planning to those responsible for implementation.

The final plan is available to every UUFLG member, both in electronic format on our web site and as printed copies at the Fellowship building. The membership will be asked to delegate plan approval to the UUFLG Board of Trustees at our annual meeting.

The bylaws of the UUFLG assign responsibility for “facilitation and leadership of long range planning” to the UUFLG Vice-President. The Long Range Planning Committee will remain active to assist the Vice-President in monitoring progress and any needed revisions to the plan.

UUFLG Congregational History

The Fellowship was founded on Sept. 5, 1949, by Madeleine Cutten. For a short history of the fellowship please read Appendix A of this report.

Long Range Planning Guide

Major Themes by Category by Year:

The following categories are extracted from the UUFLG Mission Statement and are the major themes of this plan. The category “Long Range Planning” was added in order to ensure that the plan was kept up to date as a “living” document.

Category	2008-09	2009-10	2010-11	2011-12	2012-13
Place	Reduce Debt & Plan for Expansion	Intellectual & Ethical Concentration	Major Fund Raising	Construction or Building Expansion	Intern Minister
Spirituality	Religious Ed for Children & Adults and Music	Improved Music and Choir & Part-time Music Director	Additional Spirituality Programs	Community Lecture Series on UU Values	Support Program for Single Parents
Growth	Awareness Campaign	Improve “Comeback” Rate	Improve Integration of New Members	Funding for Growth	Continued Membership Growth
Community	Community Support Committee Formed	Indigenous (to UUFLG) Community Support Activities	Community Support Expansion	Expand Awareness	Major Outreach Program Started
Long Range Planning	Long Range Plan Approved	Long Range Plan Audit	Long Range Plan Update	Long Range Plan Audit	Long Range Plan Update

This chart presents the objectives for each category by year. The remainder of this report will address each of the objectives in detail.

PLACE (AND PROGRAMS)

Goal: Provide a place where people are inspired to think about and discuss values, ethics and the meaning of their lives

Situation:

The Fellowship purchased our wonderful building in 1988, and in 1992 had special fund raising to expand the building to meet our immediate need for classroom and meeting space. Over the years there have been several projects to improve the facility. The West Room was remodeled in 2000, and in 2006 the kitchen was upgraded. The attractive landscaping has been a constant work in progress and now has automatic watering. The most recent work (2006) has been replacement of all of the gutters on the roof. Also completed was a remodel of our foyer (2006-07). While the building has been adequate for our needs we need to be thinking about the future and how having a settled minister and growth is changing our needs. The plan addresses “place” in the physical sense as well as a “community” sense.

One of the pertinent items that came out in our October 2006 survey is that our members, by a very significant majority, do not want to consider moving from our current location. The plan is based upon improving our existing facilities instead of moving to a new facility/location.

Objective P-1: Provide for the expansion and improvement of our facility over time to continue to support the requirements of a growing and changing Fellowship.

Strategy:

The strategy is to incrementally improve our physical facility and programs that facilitate community as we grow in numbers and as our requirements change.

Completion Time Frame: FY 2010-11

Success Metrics:

- ◆ Satisfaction as expressed in general conversation and in specific surveys
- ◆ The success of any fundraising efforts
- ◆ Completion of “Tasks” on time and on budget

Tasks:

Task #	Task Description	Responsible Party
P-1.1	Do a special fundraising project to reduce or eliminate as much as possible of our current mortgage debt of approximately \$50,000 Also, look to reducing the interest paid on the remaining debt.	Finance Committee
P-1.2	Study the outside sound problems in the Sanctuary to determine source of problem(s) and propose a solution	Building and Grounds Committee
P-1.3	Have architect do a study on a <u>2 phase</u> expansion of our building to accommodate classroom, office and storage space. This would be a two part study: (1) A minimum plan to	Board of Trustees & Finance Committee

	supply inexpensive and minimum classroom space on the sides of the sanctuary, and (2) A major expansion of our present site (most likely involving a 2 nd story) to accommodate much expanded classroom and office space.	
P-1.4	Establish a long range maintenance schedule for roof, painting, parking lots, plumbing, landscaping, heating and air conditioning, etc.	Building and Grounds Committee
P-1.5	Capital campaign followed by a First Mortgage on building to support new construction projects (based on P-1.3 recommendations)	Finance Committee and Board of Trustees
P-1.6	First level of building expansion (based upon P-1.3 recommendations). This is the “minimum” option.	Building and Grounds Committee
P-1.7	Second level of building expansion (based upon P-1.3 recommendations). This is the “ideal” option.	Building and Grounds Committee
P-1.8	An internal (to our building) esthetics project to make our Sanctuary and other rooms aesthetically pleasing and conducive to our mission and goals.	Finance Committee and Board of Trustees
P-1.9	Perform an energy audit of the facility an incorporate environmentally responsible practices in building maintenance and expansion.	Building and Grounds Committee

Objective P-2: Enhance the overall Fellowship satisfaction via intellectual and ethically oriented events and programs.

Strategy:

Provide a wide array of interesting programs and events that appeal to our intellectual, ethical and UU values and to our sense of community.

Completion Time Frame: FY 2009-10

Success Metrics

- ◆ Satisfaction as expressed in general conversation and in specific surveys
- ◆ Direct Observation

Tasks:

Task #	Task Description	Responsible Party
P-2.1	Establish a men’s group	Membership Committee
P-2.2	Establish a book discussion group	Lifespan Education
P-2.3	Establish a Discussion Forum that is oriented to intellectual and ethical issues and with member discussion and dialog as a main component	Minister, Sunday Services and Social Action Committees
P-2.4	Establish a guest speaker lecture series that would address our UU values and be attractive to the local community	Minister and Social Action Committee

Objective P-3: Prepare our Fellowship to be able to hire an Intern (not Interim!) minister to assist the Settled Minister and our RE program.

Strategy:

Now that we have a Settled Minister we have a future opportunity to employ an Intern Minister. This would both provide a service as well as enhance the Fellowship reputation within the UU community. The process is not clearly understood but our neighbor UU community in Sunnyvale has done this over the past several years.

Completion Time Frame: FY 2012-13

Success Metrics

- ◆ Understanding what is required
- ◆ Ensuring that we are ready for an Intern Minister
- ◆ Hiring Intern Minister

Tasks:

Task #	Task Description	Responsible Party
P-3.1	Research on Intern requirements for a congregation	Long Range Planning Committee and Minister
P-3.2	Action plan	Board and Minister
P-3.3	Hire Intern	Board and Minister

SPIRITUALITY

Goal: Stimulate spiritual growth in children and adults through exposure to a wide variety of religious thought and experience

Situation:

Spirituality differs from person to person: some feel spiritual while attending a mass or ritual in a grand cathedral while others feel spiritual on a canoe trip in the wilderness or looking at the Milky Way. Some enjoy the spiritual feeling of worshipping in a group setting. For others spirituality is an intense internal experience. Our Fellowship’s members and friends have an incredibly diverse set of religious beliefs (see our 2006 Membership Survey for details).

Since 2000 we have had five part time “Directors of Religious Education” or DREs. Most of them were selected by a search committee, approved by a membership vote, given a contract and yet none of them served our Fellowship for more than one year, due to a number of reasons including DREs moving away from our area. It should be noted that while each DRE was competent, none of them were qualified UUA DREs, one was not a Unitarian Universalist, and none of them provided adult

religious education. The members of the DRE search committees found a lack of qualified DREs within a reasonable commute distance from our Fellowship.

Having competent people running our Religious Education program for children is vitally important to our Fellowship. The recent member survey showed that there is also a strong desire on the part of members for adult religious education. This need has not been adequately addressed for perhaps the past 10 or so years.

Objective S-1: Provide a quality religious education program for children and adults.

Strategy:

During the Fellowship year 2006-07 we decided to not search for another part time DRE. Instead the board approved funding for two paid RE teachers. In the 2007-08 budget year we decided to hire a DRE with pay equivalent to a ¼ time fully qualified DRE. Over the next several years, as growth of the children’s RE program continues, we will support our DRE to become better trained. When this happens we will increase the hours and expect the DRE to also handle the planning and coordination of our adult religious education.

Completion Time Frame: FY 2009-10

Success Metrics:

- ◆ Satisfaction of children via discussion and informal survey
- ◆ Satisfaction of parents as expressed in general conversation and in specific surveys
- ◆ Growth in the number of children in average attendance on Sunday
- ◆ Establishment of an adult RE component of Lifespan Education
- ◆ Adults’ satisfaction with RE in the Lifespan Education program

Tasks:

Task #	Task Description	Responsible Party
S-1.1	Employ a part time DRE for children’s program	RECCY
S-1.2	Employ two teachers for children’s Sunday programs	RECCY
S-1.3	Establish an ongoing adult RE program with 6 to 8 classes per year – with some outside providers	Minister & RECCY
S-1.4	Provide sufficient funds for viable children’s <u>and</u> adult RE.	Board of Trustees
S-1.5	Establish an adult RE committee and program	Board of Trustees, Minister and Lifespan Education

Objective S-2: Provide a high quality music program for our Sunday Service

Strategy:

For many years we have been able to get along with voluntary pianists to support our Sunday Services. The volunteer music program has been very good but it will be necessary to hire paid staff to handle the growth in the music program. This will be done as funds are available and as skilled personnel can be found.

Completion Time Frame: FY 2009-10

Success Metrics:

- ◆ The growth in the average attendance on Sunday

Tasks:

Task #	Task Description	Responsible Party
S-2.1	Hire a part time pianist (~two Sundays per month)	Minister and Board of Trustees
S-2.2	Increase part time pianist to 3 to 4 Sundays per month	Sunday Services Committee
S-2.3	Hire a part time music director	Minister and Sunday Services Committee
S-2.4	Establish a choir and/or singing group	Minister and Sunday Services Committee

Objective S-3: Provide a mid-week meditation service

Strategy:

This will initially be an experiment to see if this is a viable program. Many churches and Fellowships have a midweek service and such services are often meditation oriented.

Completion Time Frame: FY 2008 - 2009

Success Metrics:

- ◆ The average attendance on mid-week services

Tasks:

Task #	Task Description	Responsible Party
S-3.1	Perform an informal survey to determine interest of our members and friends	Sunday Services Committee
S-3.2	Establish a day and time and start mid-week meditation service and advertise it to the membership via newsletters and email lists	Minister
S-3.3	Determine via attendance records the ongoing viability of the service	Sunday Services Committee

Objective S-4: Provide a community lecture series addressing subjects compatible with our UU values and programs.

Strategy:

The intent here is to establish a coherent set of lectures on subjects of interest to our members and to invite speakers to provide the lectures. We would also to invite, via advertising, members of our

surrounding towns and communities. The expectation is that a charge will be made for the series. The actual lectures will be held in the evenings and a series might last for 6 or 8 weeks. Potential series subject matter could be: Religions of the World, Civil Rights in the 21st Century, A History of Religious Activism, Social Action Issues, etc.

Completion Time Frame: FY 2010-11

Success Metrics:

- ◆ The average attendance at lectures
- ◆ Mention of UUFLG hosted lectures in the local press

Tasks:

Task #	Task Description	Responsible Party
S-4.1	Establish seed funding for Lecture Series (about \$5000)	Board of Trustees
S-4.2	Establish a first year series with appropriate advertising and staff support	Sunday Services and Social Action Committees
S-4.3	Use attendance and financial records to determine the ongoing viability of the service	Sunday Services and Social Action Committees

Objective S-5: Provide a support program for single parents that gives them validation and the tools to be the spiritual guide for their children (this program can also be open to others).

Strategy:

Provide a safe and friendly support environment for single parents. If we are able to help these people we will have done a great service to this select group and at the same time expose them to our UU community.

Completion Time Frame: FY 2011-12

Success Metrics:

- ◆ The average attendance at program events

Tasks:

Task #	Task Description	Responsible Party
S-5.1	Establish a study of local community needs for a single parents support environment	Minister and Membership Committee
S-5.2	Advertise the program	Communications and Admin Committee
S-5.3	Start support sessions	Sunday Services Committee

S-5.4	Evaluate program success and put in place a plan for the future	Sunday Services Committee
-------	---	---------------------------

GROWTH

Goal: Anticipate requirements and support UUFLG growth and implement methods and processes to facilitate and accommodate that growth.

Situation:

After a year with our settled Minister, the UUFLG anticipates a period of increasing growth. There was a slight increase in members during 2006 and 2007. A larger membership means increased personnel as well as financial resources. Increased resources are needed to expand and enhance service to both our internal and external communities. To effectively welcome new members and provide benefit for them and the Fellowship community, the new members must be integrated into Fellowship activities and operations. The area of growth has two items of concern: 1) to facilitate and encourage growth and, 2) to integrate new members. Based on the congregation survey results, the Fellowship plans to remain in its current location and will self-limit growth to that which can be accommodated by physical expansion at the current site.

Objective G-1: Attract new Fellowship members

Strategy:

In order to attract new members, we plan to develop and implement advertising and outreach programs to increase community awareness of UU in general and the UUFLG specifically. Advertising and community awareness efforts should not be restricted to print ads in the local newspaper but to embrace all reasonable means of attracting positive attention to UU and the UUFLG. Forms of advertising might include (but not be limited to):

- Participation in community activities and events
- Participate in Social Action activities
- Contribute to “New-Comer” realtor information packets
- Distribution of UUFLG brochure / “flyer”
- Posting of UUFLG events “flyers”
- Local newspaper articles about guest speaker(s)
- Establish a strategy for use of the Internet to attract new prospective members
- PBS auction matching grant
- Participate in PCD – regional marketing campaigns

Completion Time Frame: FY 2008 - 2009

Success Metrics:

- ◆ An advertising and community awareness committee (or sub-committee) formed and active.
- ◆ A written advertising and community awareness plan published.
- ◆ Increase in number of first time visitors

Tasks:

Task #	Task Description	Responsible Party
G-1.1	Form and activate Community Awareness Committee (or subcommittee.)	Board
G-1.2	Prepare a written Community Awareness plan, e.g. <ul style="list-style-type: none"> • Word-of-mouth; encourage members to invite friends to services or activities • Articles in local community newspapers • UUFLG sponsored member involvement in community service activities. Non-UU activities organized and held at the UUFLG. • Organized non-UU activities held at the UUFLG. • Improved UUFLG signage – at UUFLG and on roadway(s). 	Community Awareness Committee
G-1.3	Implement the Community Awareness Plan	Community Awareness Committee
G-1.4	Explore the Internet for more effective communications	Community Awareness Committee

Objective G-2: Increase return attendance by prospective members.**Strategy:**

Improve first impressions and demonstrate a genuine welcome and personal interest. Update the new-attendeewelcoming and orientation process. Develop and implement a “visitors” aesthetic inspection and correction process.

Completion Time Frame: FY 2009 - 2010

Success Metrics:

- ◆ A refreshed and documented process for welcoming new attendees (with follow-up)
- ◆ An expanded and trained group of greeters.
- ◆ A documented process for aesthetic inspection and correction.

Tasks:

Task #	Task Description	Responsible Party
G-2.1	Prepare an updated, written new member process, possibly including: <ul style="list-style-type: none"> • Initial greeting, welcome and orientation • After service follow-up (coffee hour conversation) • Topics for discussion (e.g., exploration of interests, explanation of UUFLG activities.) • After visit follow-up • Staffing and training of greeters 	Membership Committee

G-2.2	Prepare a written aesthetic inspection process, possibly including: <ul style="list-style-type: none"> • Weekly walk-around inspection to identify aesthetic detractors (look through visitor’s eyes.) • Periodic volunteer Fellowship workdays • Identification of long-term facility enhancement projects 	Building & Grounds Committee
-------	--	------------------------------

Objective G-3: Integrate new members smoothly and efficiently

Strategy:

Enhance the process for new member orientation and integration into Fellowship activities and operation. Enhance New Member orientation classes. Involve new members in Fellowship activities and operation

Completion Time Frame: FY 2009 - 2011

Success Metrics:

- ◆ A written plan published defining the process(es) for orientation of new members and facilitating their introduction and involvement to Fellowship activities and their participation in Fellowship operation.

Tasks:

Task #	Task Description	Responsible Party
G-3.1	Prepare a written new member introduction and integration plan.	Membership Committee
G-3.2	Conduct orientation classes for interested potential new members: <ul style="list-style-type: none"> • Document a standard syllabus for potential new member orientation • Evaluate use of one-session, short-form class orientation for after service scheduling • Schedule and conduct orientation classes twice yearly • Include an introduction to UUFLG committees and committee members in the orientation 	Minister / Membership Committee
G-3.3	Consciously integrate new members into operation of the Fellowship and into Fellowship activities. Specific steps could be: <ul style="list-style-type: none"> • Membership committee to maintain a new members and friends list with contact information – distribute to all committee chairs. • All committee chairs actively seek out participation from new members – add one new member to each committee each year. (Membership committee to maintain status.) • Organizers of Fellowship activities to specifically solicit new member participation and attendance. (Membership 	Minister overall coordination Membership Committee Committee chairs Minister coordination Membership Committee

	<p>committee to maintain status.)</p> <ul style="list-style-type: none"> • Membership committee to collect data on all Fellowship committees and Fellowship on-going activities and prepare committees' information brochure. • Publish monthly short committees' activity report in Fellowship newsletter (committee chairs' responsibility - membership committee to maintain status.) 	Committee chairs
G-3.4	Establish and maintain monthly social program and ensure that new and prospective members are invited to participate (e.g. Dinners-for-Eight, etc.)	Membership Committee

Objective G-4: Ensure adequate funds are planned and availability to accommodate Fellowship growth and operation.

Strategy:

Develop a long-range congregation estimated growth profile. Develop a long-range operating funds needs analysis and establish a year-round fund raising activity.

Completion Time Frame: FY 2010 - 2011

Success Metrics:

- ◆ Operating funds analysis completed and updated yearly.
- ◆ Fund raising targets set yearly and a yearly fund raising plan prepared and implemented.

Tasks:

Task #	Task Description	Responsible Party
G-4.1	<p>Develop a long-range congregation estimated growth profile Possible process:</p> <ul style="list-style-type: none"> • Prepare an estimate of expected yearly congregation growth. • Prepare an analysis of top-level facility needs and Fellowship operation change options based on congregation size (e.g., class-room and staff office floor-space, social gathering facilities, alternate service schedules) • Determine how far in advance of achieving a specific size that changes should be initiated 	Long Range Planning Committee (all sub-tasks)
G-4.2	<p>Develop a multi-year yearly operating funds needs analysis based on estimated congregation growth. Possible process:</p> <ul style="list-style-type: none"> • Develop an operating funds category list and define a relationship between amounts and membership numbers • Prepare a multi-year staffing plan based on estimated congregation growth • Prepare a multi-year capital improvement plan including consideration for building expansion (reference Objective under "Place" below) and large item anticipated maintenance and upgrade items 	<p>Finance Committee (coordination) Finance Committee Minister</p> <p>Building and Grounds Committee Finance Committee</p>

	<ul style="list-style-type: none"> • Consolidate all funding needs in summary report 	
G-4.3	<p>Establish a year-round fund raising plan for Fellowship operating funds and capital expenditures. Possible process:</p> <ul style="list-style-type: none"> • Use funds needs analysis to establish quarterly fund raising targets • Develop a yearly plan for pledge solicitations – set realistic yearly targets based on estimated congregation growth • Define a list of fixed-calendar fund raising events to be conducted each year – minimum of one each quarter with targets for each event • Define an “ideas” list of optional fund raising activities to be scheduled to fill gaps to needs • Prepare a total future-years funds availability projection and identify any variance to needs • Plan and conduct congregation solicitations for special, one-time expenditures 	Finance Committee (all sub-tasks)

COMMUNITY SUPPORT

Goal: Expand and enhance the support activities provided by the UUFLG.

Situation:

Based on information gathered from the broad-based congregation survey and Cottage Meeting discussions, the UUFLG has a strong interest in expanding and enhancing its community support activities. The survey also indicated that there is a lack of awareness by the congregation of the current activities. A special emphasis is needed to both internally publicize current community support, enhance performance of current activities and to develop new areas for community support. In addition to satisfying a desire of the congregation, increased community support activity will “advertise” the UUFLG and UU in general and should attract additional potential members.

Objective C-1: Formation of a UUFLG Community Support Coordinating Committee

Strategy

A coordinating committee is needed in order to ensure successful enhancement and expansion of community support activities. Potential activities may fall under other committee areas of responsibility.

Completion Time Frame: FY 2008 - 2009

Success Metrics:

- ◆ A staffed and active Community Support Coordinating Committee (CSCC).
- ◆ Support from the UUFLG Board and other contributing committees.

Tasks:

Task #	Task Description	Responsible Party
C-1.1	Staff the committee, preferably by members of other affected committees, such as: Social Action, Membership, Finance	Board
C-1.2	Develop a possible activities list such as: <ul style="list-style-type: none"> • Reference list of current and previous activities. • Activity ideas from other committees and the Fellowship at large 	CSCC
C-1.3	Select and implement two new activities. Possible process: <ul style="list-style-type: none"> • Review potential activities and rank in order of preference • Solicit acceptance of responsibility from an appropriate existing committee or subcommittee • Coordinate implementation 	As assigned by CSCC
C-1.4	Review all on-going community support activities and develop recommendations for continuance, modification or discontinuance.	CSCC

Objective C-2: Develop an indigenous (UUFLG led) community support activity**Strategy:**

In order to expand current UUFLG community support, potentially attract new members and encourage current membership participation, the UUFLG will develop an indigenous (UUFLG led) community support activity. In addition, low cost or free use of the Fellowship facilities may be offered to benefit outside community support activities. A yearly review should be made to determine if a refreshed indigenous activity is needed.

Completion Time Frame: FY 2009 - 2010

Success Metrics:

- ◆ One new indigenous community support activity in place by Dec 2010
- ◆ At least once a quarter low rental or free UUFLG facility use for outside community support activities starting Dec 2009.

Tasks:

Task #	Task Description	Responsible Party
C-2.1	Offer low/no cost building use for worthy outside community activities or events. Possible process: <ul style="list-style-type: none"> • Develop user criteria and use rules • Develop a list of potential worthy outside facility users and advise them of facility use possibilities. 	CSCC
C-2.2	Select a UUFLG indigenous community support lead committee, an activity team leader and support team.	CSCC

C-2.3	Develop and implement indigenous Community Support activities. Possible process: <ul style="list-style-type: none"> • Compile potential indigenous activities list (from list of task C-1-2.) • Select a candidate indigenous activity • Implement the indigenous community support activity 	Lead committee
C-2.4	Conduct a yearly indigenous community support activity review.	Board

Objective C-3: Participate in externally sponsored community support activities

Strategy:

There are several externally sponsored community support activities that might be of interest to the UUFLG congregation. However, the available opportunities may not be widely known by the congregation nor have a Fellowship “Champion” to organize participation. A periodic review of externally sponsored opportunities should be maintained from which a few opportunities can be selected and participation developed.

Completion Time Frame: FY 2009 - 2010

Success Metrics:

- ◆ At least two externally sponsored projects active within the UUFLG by June 2011.

Tasks:

Task #	Task Description	Responsible Party
C-3.1	Select externally sponsored projects.	CSCC, Social Action Committee
C-3.2	Implement participation in selected externally sponsored community support projects	CSCC, Social Action Committee
C-3.3	Conduct a yearly review of externally sponsored community support projects.	Board

Objective C-4: Improve internal and external awareness of UUFLG community involvement activities

Strategy:

Develop and implement internal advertising to increase community awareness of UUFLG community support activities. Externally publicize UUFLG community support activities.

Completion Time Frame: FY 2011 - 2012

Success Metrics:

- ◆ Continuing articles in the UUFLG newsletter discussing community support activities.
- ◆ Entry hall posters concerning community support activities – new postings at least monthly.

- ◆ External notices of UUFLG community support activities.

Tasks:

Task #	Task Description	Responsible Party
C-4.1	Compile and keep current a list of all on-going community support activities.	CSCC
C-4.2	Include information about community support activities in every monthly UUFLG Newsletter	CSCC
C-4.3	Arrange for one article every six months in local newspapers concerning a UUFLG community support activity.	Community Awareness Committee

In this report we have addressed each of the major long range planning categories for the next 5 years. The report identifies specific objectives and tasks, including success metrics per category and year. We believe this a good start and will help the fellowship to move forward successfully. Of course, this is a living document and may need to evolve as time passes and circumstances change. Accordingly, regular review of the long range plan is included as an ongoing (annual) activity.

Appendices:

Appendix A - UUFLG Congregational History

The Fellowship was founded on Sept. 5, 1949, by Madeleine Cutten, who brought her Unitarian affiliation with her when she moved to California from New England. The group initially met in the Cutten house and other residences in Los Gatos. One of our current members, Hugh Warner, age 90 remembers Mrs. Cutten as "...an impressive person, friendly, positive, well spoken, cheerful, and thoughtful.'

The '50s, '60s, '70s – Dynamism, Turbulence, Activism, Social Change

Before too long the group outgrew members' living rooms and began meeting at other venues around town with dynamic and varied programs that featured a combination of invited speakers and talks by Fellowship members. By the mid-'50s, there were over 100 adults and over 50 children in the Fellowship. By the second half of the decade thoughts turned to property acquisition. This was an era of intellectual freedom, great fun together and much sociability.

In 1961 the Fellowship bought a three acre property and in the summer of 1963 Dick Weston, a new seminary graduate was called to be their settled minister. and was subsequently ordained. Weston's interests leaned heavily toward community involvement and service. As the social activism of the '60s took full bloom, many of his choices became controversial within the Fellowship. Even though the group itself was dedicated to Social Action, many members felt he was not devoting enough energy to the congregation. By early 1966, disagreement between Weston and the lay leadership reached a climax and the board asked him to resign. This was a wrenching experience for all involved. The membership split in two, losing many members in the process. Reverend Weston subsequently went on to have many successful ministries around the country.

In spite of the split, a joint Social Responsibility Committee with a strong focus on anti-war activity and draft counseling became an important resource for the community. This effort evolved into the West Valley Peace Center, an organization that served the larger community until the end of the Viet Nam war.

In 1970, the two groups came back together, reduced in size and with wariness regarding professional ministry. The Sunday programs, now at the Los Gatos Recreation Center on E. Main Street, continued to be stimulating and challenging and the discussions remained lively. All activities other than Sunday morning services continued to be held at member's homes, with interesting new-wave adult RE evenings and weekly potlucks for sociability. Music became an important part of group activities. Children's religious education was struggling but there were many family activities that kept the children involved in the life of the Fellowship. The farm worker labor movement was a central Social Action issue.

The '80s and '90s – Renewed Growth, Finding a Home, Settling in

The '80s were an era of renewed growth for the Fellowship. In 1982 the children's religious education program was jump-started with the hiring of several very talented teachers, our first paid staff since the mid-60's. With the new RE program, the Fellowship began to grow dramatically with

new families and children. During this time, the Sunday service programs were intellectual in nature, and continued to be lay-led. The annual budget was only about \$10,000.

With growth came a renewed desire for a building of our own. In the spring of 1988 our president, Sharon Lindsay, one of the key promoters of the idea, found a church for sale on Blossom Hill Road. Although we knew the building would need to be expanded, we loved the sanctuary and the overall look of the building.

Amazingly, the Fellowship was able to raise the money needed to buy the \$315,000 building, having an annual budget of only \$12,000 at the time, and a net worth of \$60,000 from the land sale many years earlier. The UUA and PCD helped immensely in finding us a fund-raising consultant who helped us raise over \$200,000 in a few months. We still remember our motto—"Give until it feels good!" The Fellowship's lay leadership structure changed in scope immediately with the addition of a Building and Grounds Committee and a Finance Committee. Because we had only one classroom, most of our children walked several blocks down the street to the local elementary school's clubhouse each Sunday for their classes.

In 1990, the membership embarked on a long range plan called 'Vision for the 90s', the outcome of which was to expand our building in 1992 by adding three classrooms, and remodeling the lounge and kitchen. This was a major project that required our second major fund raising campaign which resulted in successfully raising an additional \$200,000 to pay off the mortgage on the building and finance the new extension.

By the mid-'90s, we began the practice of having one Sunday program per month by an invited outside minister or Starr King seminary student, indicating the beginning of a shift toward interest in professional ministry. And by the late '90s there was a growing movement in the direction of accepting professional ministry as a future possibility.

The '00s – The Path to Settled Ministry

The year 2000 was a turning point for the Fellowship, making the decision to move from lay leadership to professional ministry. At the same time, the decision was made to move from paid teachers in the children's RE program to a paid Director of Religious Education (DRE). They raised and allocated funds for both a half time minister and a half time DRE. In the fall of 2000 a member of the Fellowship was selected for the DRE position and a search committee was formed to select a minister, thus starting on the path to settled ministry.

Reverend Parisa Parsa was engaged as a half-time contract minister in September, 2001. She was greatly loved by the congregation for her excellent sermons, bright intellect and compassionate spirit.

The next year the Fellowship engaged a new seminary graduate, Erika Hewitt, as a ¾ time contract minister, and she was given the full support of the Fellowship when she began in the fall of 2002. She quickly embarked on a campaign of change, without garnering support for the changes she sought, causing animosity in the process. By the end of her first year more than half of the membership had become alienated. When the board asked the membership to ordain her in the fall of 2003, the measure failed, creating harsh feelings on her part and the part of her supporters. The Pacific Central District conflict management team was invited to assist and their subsequent report comforted those

on both sides of the issue. In February, 2004, Erika made the decision to fulfill the rest of her contract, but not to pursue renewal for the following year.

In the fall of 2004, the congregation engaged Reverend Ben Kocs-Meyers as a twice a month Sunday only minister. This was a year of healing for the congregation and Ben's excellent Sunday services and sermons were a great comfort and source of inspiration to the congregation. He helped with a highly successful pledge drive that put the congregation in the position to prepare for full time professional ministry.

In the spring of 2005, following the advise of the district executive, the congregation decided to have two interim years prior to calling a settled minister. Reverend Nancy Roemheld was engaged as interim minister in the fall of 2005. She brought a sense of humor and a relaxed, good natured spirit to the group, encouraging us to lighten up and have confidence. In the fall of 2006, Reverend Carolyn Colbert came to fill the second interim year. She actively helped us prepare to call a settled minister by motivating us to improve Sunday services, spruce up the building, and look to the future.

In August of 2007 Victoria Ingram became our Settled Minister. The settlement process from start (January 2000) to success (August 2007) took 91 months.

Appendix B: Cottage Meeting and Membership Summary Reports

(note – The Cottage Meeting and Membership Survey summary report is 27 pages and will be included in the final report (HRC Feb 26, 2008).