

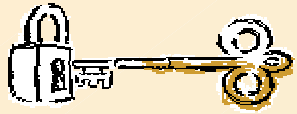


FYP Task Force

Final Report Summary To

AUUC

Congregation



Keys to AUUC FYP Implementation

Mission



Vision



5 Year Plan

Goals

Objectives

Five Year Plan Task Force Members

Chairperson - *Steve Knott*

Goal Oversight Assignments:

- 1 Leadership Development** - *D. J. Caulfield*
- 2 Caring Community** - *Marge Runge*
- 3 Enriched Church Experience** - *Christy Choi*
- 4 Visible Community role** - *Lemont Jolley*

Task Force Effort - Summary

- ✓ Developed Goal/Objective Rationale Statements
- ✓ Solicited/Evaluated Congregation Priorities
- ✓ Obtained Approval to Add Two Objectives
- ✓ Developed Implementation Resource Estimates
- ✓ Developed an Implementation Schedule
- ✓ Assigned Implementation Responsibilities
- ✓ Obtained BOT Commitment to Growth
- ✓ Authored and Submitted Five Year Plan
- ✓ Developing a “Follow-On” Group Charter

Solicited AUUC Congregation Comments

AUUC Comment Summary:

- ✓ **Strategic Planning Not Apparent**
- ✓ **Objectives Don't Completely Implement Goals**
- ✓ **Need to Assign Implementation Priority**
- ✓ **Rationale for Goals and Objectives Not Visible**
- ✓ **Need to Consider Committee Workload**
- ✓ **Need to Address Resource Requirements**

AUUC Member Implementation Priority

AUUC Goal and Objective Priorities

	G1. Leadership	G2. Caring Community	G3. Enriched Church Experience	G4. Community Role
	HIGH	HIGH	HIGH	HIGHEST
Objective 1	HIGH	HIGH	MEDIUM	HIGH
Objective 2	MEDIUM	HIGH	HIGH	MEDIUM
Objective 3	HIGH	HIGH	HIGH	HIGH
Objective 4	LOW	HIGH	MEDIUM	LOW
Objective 5	MEDIUM	HIGH	HIGH	
Objective 6		HIGH	HIGH	
Objective 7		HIGH	MEDIUM	
Objective 8		MEDIUM	LOW	
Objective 9		HIGH	TBD	
Objective 10		LOW		
Objective 11		MEDIUM		

Goal/Objective Resource Impact Summary

Summary Resource Impact

	G1. Leadership	G2. Caring Community	G3. Enriched Church Experience	G4. Community Role
	MEDIUM	MEDIUM	LARGE	LARGE
Objective 1	SMALL	MEDIUM	MEDIUM	LARGE
Objective 2	SMALL	MEDIUM	MEDIUM	LARGE
Objective 3	SMALL	MEDIUM	MEDIUM	MEDIUM
Objective 4	LARGE	SMALL	MEDIUM	LARGE
Objective 5	MEDIUM	MEDIUM	SMALL	
Objective 6		SMALL	LARGE	
Objective 7		SMALL	LARGE	
Objective 8		MEDIUM	LARGE	
Objective 9		SMALL	LARGE	
Objective 10		LARGE		
Objective 11		LARGE		

Resource Impact Assessment

- Resources Assessed: Order of Magnitude**
 - ✓ Cost (Non-Recurring & Recurring)
 - ✓ Facility Impact (Less Rent and/or More Space)
 - ✓ Volunteer Hours (Start-Up & Recurring)
 - ✓ Staff Hours (Initial and Steady State)

- Categorized Cost Impacts**
 - ✓ Small (<\$ 2,500)
 - ✓ Medium (> \$ 2,500 < \$5, 000)
 - ✓ Large (> \$ 5,000)

- Developed Volunteer/Staff Impact Rationale**
 - ✓ Small (< 200 Hours/Year)
 - ✓ Medium (> 200 < 500 Hours/Year)
 - ✓ Large (> 500 Hours/Year)

Implementation Workload

❑ Cross-Committee Coordination Workload

- ✓ 14 Objectives Involve **One or Two** AUUC Groups
- ✓ 9 Objectives Involve **Three or Four** AUUC Groups
- ✓ 3 Objectives Involve **Five or Six** AUUC Groups
- ✓ 3 Objectives Involve **Seven to Nine** AUUC Groups

❑ Committee Implementation Workload

- ✓ 6 AUUC Groups Are Assigned to **no** Objective
- ✓ 5 AUUC Groups Are Assigned to **One - Three** Objectives
- ✓ 6 AUUC Groups Are Assigned to **Four or Five** Objectives
- ✓ 5 AUUC Groups Are Assigned **Six - Nine** Objectives
- ✓ 1 AUUC Group Is Assigned to **Fourteen** Objectives
 - Lifespan Ed – Lead 5; Support 9

Implementation Schedule

- Resource Considerations**
 - ✓ **Phased Start Dates**
 - ✓ **Small Resource Impact Objectives Implemented First**
 - ✓ **Large Resource Impact Objectives Implemented Last**
- Goal Priority Considerations**
 - ✓ **Caring Community – First**
 - ✓ **Enriched Church Experience - Second**
 - ✓ **Community Role – Third**
 - ✓ **Leadership - Fourth**
- Multi-Committee Coordination Effort**
 - ✓ **Little – First**
 - ✓ **Some - Second**
 - ✓ **A Lot - Third**

Goal/Objective Launch Dates

AUUC Goal/Objective Implementation Start Dates							
Year One [10/1/06 - 9/30/07]		Year Two [10/1/07 - 9/30/08]		Year Three [10/1/08 - 9/30/09]		Year Four [10/1/09 - 9/30/10]	
Objective	Start Date	Objective	Start Date	Objective	Start Date	Objective	Start Date
2.2 Family Night Programs	Oct-06	2.5 Interchurch Youth Act	Oct-07	2.7 Welcoming Congreg. WS	Oct-08	2.10 Comp Val Orient Purch. Pol.	Oct-09
2.6 Safe Congregation WS Part.	Oct-06	3.3 Inactive Participation Eval	Oct-07	2.9 New Member Assimul. Prog	Oct-08	4.4 Caregiver's Network	Oct-09
2.8 Youth Decision Participation	Oct-06	3.1 SGM Involvement	Jan-08	3.8 Issue 5 Yr Aesthetics Plan	Oct-08		
3.2 High Quality Music	Oct-06	4.2 Focus Community Involvement	Jan-08	1.2 Comm/TF Leader Train.	Jan-09		
3.5 Annual FYP Eval	Oct-06	4.3 Interchurch Cluster Program	Jan-08	1.4 Lay Ldr Spirit Gwth Train.	Apr-09		
3.7 Issue Plan for Build Code Comp.	Oct-06	2.4 Ministry Skill Program	Apr-08	3.9 Church Accessability Imp'mts	Apr-09		
2.11 Green Round Table Prog.	Jan-07	4.1 Hosting Outreach Events	Apr-08	1.3 Comm/TF Member Train.	Jul-09		
2.3 Social Awareness Prog	Apr-07	1.1 BOT Training	Jul-08				
3.6 Issue 10 Yr H&G Deprec Plan	Apr-07	1.5 Committee Succession Plan	Jul-08				
2.1 High Interest Adult Ed Prog	Jul-07	3.4 Active Participation Eval	Jul-08				

	Starts
Year 1	10
Year 2	10
Year 3	7
Year 4	2
Total:	29

Five Year Plan Implementation Groups

Accotink Groups [Board, Council, Committees & Staff]

1	Accotink Circle of Caring (0/1)	13	Lifespan Education (5/9)
2	Board of Trustees (4/2)	14	Membership (3/2)
3	Church Council (2/5)	15	Ministerial Relations (0/1)
4	Communications/Newsletter (0/3)	16	Pledge (0/0)
5	Denominational Affairs (0/2)	17	Rental (0/0)
6	Endowment & Bequests (0/2)	18	Social Activities (0/4)
7	Finance (0/6)	19	Social Justice (2/6)
8	Fundraising (0/0)	20	Staff (2/7)
9	Green Roundtable (2/3)	21	Welcoming Congregation (0/0)
10	House and Grounds (2/2)	22	Worship/Music (2/5)
11	Human Resources (0/1)	23	Youth/Adult (0/6)
12	Lay Leadership/Nominating (2/0)		

"(Nos.)"are the number of objective implementation efforts an Accontink Group **Leads** and the number objectives a group **Supports** the implementation effort.

5 Year Plan Organization and Content

- Executive Summary**
- Goals and Rationale**
- Current AUUC Goals and Objectives**
- Implementation Approach**
- Implementation Responsibilities**
- Initial Implementation Schedule**
- Process to Keep Priorities Current**
- Getting Things “On-Budget”**
- Monitoring and Steering Progress**
- Appendices [Back-Up Data]**

FYP Task Force - Follow-on Entity

Core Tasks:

- ✓ **Lead and motivate the FYP process**
- ✓ **Maintain the FYP as a Living Document**
 - **Priority Alignments**
 - **Resource Planning**
 - **Cross-Goal Integration**
 - **Rolling (continuously updated) 3–7 Year Milestone Link to Vision**
- ✓ **Coordinate and Facilitate FYP Implementation**
 - **Leadership**
 - **Committees**
 - **Congregation**
 - **Professional Staff**
- ✓ **Assess Implementation Status and Report**

FYP Task Force - Follow-on Entity (Cont.)

Initially: Selected by BOT Appointment

- Reports to Congregation
- Critical Skill Set Requirements
- Phase Approach to Elected Positions
- Three (minimum) to Five (maximum) Members
- Continuity Essential (elect 1 or 2 each year)

Ultimately: Independent Commission

- Loosely modeled on the UUA's Commission on Appraisal
- Incorporate ideas from Pete's Commission on Ministry proposal
- Elected by Congregation
- Nominating Committee Proposes the Slate

Change By-Laws: Institutionalize Elected Function

- Done at the same time as the Church reorganization update

SUMMARY

- The Five Year Plan is a *Living* Document**
- Current AUUC Goals/Objectives will Change**
 - ✓ Objectives will be Added/Deleted as we go forward
 - ✓ Details Needed to Implement All Objectives are Not Defined
 - ✓ The Availability of Resources Can Not be Ignored
- Committees Implement the Plan**
 - ✓ Workload is a Concern. Additional Volunteers Needed
- Success will require:**
 - ✓ Time, Money, Staff, Facilities and more members
- The 5 Year Plan Task Force Successor should:**
 - ✓ Implement a process to keep the priorities current
 - ✓ Maintain the Implementation Schedule
 - ✓ Implement a Process to get Things “On-Budget”
 - ✓ Monitor and Steer the Implementation Process

BACKUP SLIDES

AUUC Five Year Plan - Group and Committee Implementation Assignments

		AUUC STANDING GROUPS & COMMITTEES																								
Goal	Objective	ACC	BOT	CC	C/N	DA	F&B	FIN	FND	GRT	H&G	HR	LL/N	LSE	MEM	MR	PL	RENT	SA	SJ	Staff	WC	W/M	YAC	Tot.	
G1. Leadership	1. BOT Training		L																						1	
	2. Chair/TL Training												L													1
	3. Comm. Training												L													1
	4. Lay Spiritual Grw													L												1
	5. Succession Plan			L																						1
G2. Caring Community	1. Adult Ed Prog													L							S					2
	2. Family Night													L					S							2
	3. Social Awareness					S								S						L						3
	4. Ministry Skill	S												L							S					3
	5. Interchurch Youth													L										S		2
	6. Safe Congreg. WS		L	S								S										S				4
	7. Welcome Congreg.		L	S																	S					3
	8. Youth Decision Part.		L	S											S						S			S	S	6
	9. New Mem Assim.															L						S				2
	10. Value Ori Purchase							S			L														S	3
	11. Green Sanct. Acc.										L															1
G3. Enrich Church Experience	1. SGM Involvement			L										S	S											3
	2. High Qaul. Music																				S		L			2
	3. Inactive Part Eval.													S	L						S		S			4
	4. Act. Partic, Eval				S									S	L	S					S		S			6
	5. Annual FYP Eval.	Five Year Plan Task Force Follow-On Entity																							0	
	6. 10 Yr H&G Dep. Plan							S				L														2
	7. Build Code Compl.							S				L														2
	8. 5 Yr Aesthetics Plan					S	S		S	S					S									S	S	7
	9. Church Accessibility						S				S													S		3
G4. Community Role	1. Outreach Events				S									S	S				S	S			L			6
	2. Community Involve.				S		S		S												L					4
	3. Interchurch Cluster		S	S			S							S					S	S	L			S	8	
	4. Caregiver's Network		S	S		S			S					S					S	S	L			S	9	
Totals:		1	6	7	3	2	2	6	0	5	4	1	2	14	5	1	0	0	4	7	9	0	7	6		

Goal/Objective Resource Impact Assessment

AUUC Goals and Objectives - Resource Impact Summary

	G1. Leadership				G2. Caring Community				G3. Enriched Church Exp.				G4. Community Role			
	Coordination Effort	Financial Impact	Staff Impact	Volunteer Impact	Coordination Effort	Financial Impact	Staff Impact	Volunteer Impact	Coordination Effort	Financial Impact	Staff Impact	Volunteer Impact	Coordination Effort	Financial Impact	Staff Impact	Volunteer Impact
	SM	MED	LG	LG	MED	LG	LG	LG	LG	MED	LG	LG	LG	LG	LG	LG
Objective 1	SM	SM	SM	SM	SM	SM	MED	LG	SM	SM	LG	MED	MED	MED	LG	MED
Objective 2	SM	SM	MED	SM	SM	SM	SM	LG	SM	LG	LG	MED	MED	SM	SM	LG
Objective 3	SM	SM	SM	SM	MED	SM	SM	LG	MED	SM	LG	MED	LG	SM	SM	MED
Objective 4	SM	SM	LG	LG	SM	SM	MED	MED	LG	SM	SM	SM	LG	SM	SM	SM
Objective 5	SM	SM	LG	LG	SM	SM	SM	LG	SM	SM	LG	MED				
Objective 6					MED	SM	SM	SM	SM	LG	LG	MED				
Objective 7					MED	SM	SM	SM	SM	LG	SM	MED				
Objective 8					MED	SM	SM	SM	LG	SM	MED	SM				
Objective 9					SM	SM	MED	MED	MED	LG	SM	SM				
Objective 10					MED	SM	MED	MED								
Objective 11					SM	LG	LG	MED								

SM Small Impact
 MED Medium Impact
 LG Large Impact

Goal/Objective Resource Impact Assessment

Initial Volunteer Hour Estimate

Goal	Annual					Cumulative [5 Years]
	10/06-9/07	10/07-9/08	10/08-9/09	10/09-9/10	10/10 - 9/11	Total
1	0	200	1,000	1,000	1,000	3,200
2	1,600	1,500	2,200	1,900	1,900	9,100
3	800	1,200	2,200	2,200	2,200	8,600
4	0	600	2,400	2,600	2,600	8,200
Total:	2,400	3,500	7,800	7,700	7,700	29,100

Goal/Objective Resource Impact Assessment

Initial Staff Hour Estimate						
Goal	Annual					Cumulative [5 Years]
	10/06–9/07	10/07–9/08	10/08–9/09	10/09–9/10	10/10 – 9/11	Total
1	0	0	200	200	200	600
2	600	600	1,000	1,000	1,000	4200
3	900	1,300	1,500	1,500	1,500	6700
4	0	200	200	400	400	1200
Total:	1,500	2,100	2,900	3,100	3,100	12,700

Goal/Objective Resource Impact Assessment

Initial Cost Estimate						
Goal	Annual					Cumulative [5 Years]
	10/06–9/07	10/07–9/08	10/08–9/09	10/09–9/10	10/10 – 9/11	Total
1	\$0	\$250	\$2,000	\$2,000	\$2,000	\$6,250
2	\$750	\$1,250	\$11,500	\$2,250	\$2,250	\$18,000
3	\$37,750	\$45,750	\$45,750	\$45,750	\$45,750	\$220,750
4	\$0	\$1,250	\$1,250	\$1,500	\$1,500	\$5,500
Total:	\$38,500	\$48,500	\$60,500	\$51,500	\$51,500	\$250,500

Does not Include Cost of Additional Staff

Goal 3 and Goal 4 Implementation Schedule

ID	Task Name	2006		2007				2008				2009											
		Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4							
17	Implementation Oversight																						
18	BOT/Council Status Report	9/12			3/13			9/11			3/11			9/9			3/10			9/8			3/9
27	Implementation Priority Update																						
36	Budget Update																						
45	On-Budget Transfers																						
50	G.1 Leadership																						
57	G.2 Caring Community																						
69	G.3 Enrich Church Experience																						
70	3.1 Start SGM Involvement																						
71	3.2 Start High Quality Music																						
72	3.3 Start Inactive Participation Eval																						
73	3.4 Start Active Participation Eval																						
74	3.5 Start Annual FYP Eval																						
75	3.6 Issue 10 Yr H&G Deprec Plan																						
76	3.7 Issue Plan for Build Code Comp.																						
77	3.8 Issue 5 Yr Aesthetics Plan																						
78	3.9 Start Church Accessibility Imp'm																						
79	G.4 Visible/Influential Comm. Role																						
80	4.1 Start Hosting Outreach Events																						
81	4.2 Start Focus Community Involvement																						
82	4.3 Start Interchurch Cluster Program																						
83	4.4 Start Caregiver's Network																						