

First Unitarian Society of Milwaukee
Strategic Planning Committee Report:

Vision 2010

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Strategic Planning Committee Report: *Vision 2010*

1. SUMMARY OF FINDINGS AND RECOMMENDATIONS

In this report, the Strategic Planning Committee makes Findings and Recommendations in five areas: Growth, Diversity, Social Justice, Staffing and Organization, and Finances. These Findings and Recommendations will be gradually implemented until 2010.

1. We find that the membership survey shows that First Church members clearly support church growth and development of a third service. We recommend that the third service be substantially equivalent in quality, character and associated amenities to the current two services. The time and day of the third service should be determined after consulting with the membership about certain preferences. Religious education for children during the third service should be determined by the appropriate committees, after consulting with parents about their preferences.
2. We find that the membership supports expanding our social justice activities and we recommend that First Church expand its efforts in this area. We recommend that a significant portion of a new staff member's time be devoted to social justice activities.
3. We find that the membership values diversity in the congregation and believes it is best achieved through social justice and other activities that are of concern to people of diverse backgrounds. We also find that we are an aging congregation with few members under age 35. In addition to the recommendation for increased staff and attention to social justice, we recommend an increased effort to welcome visitors and to help new members become involved with the activities of First Church. We recommend an increased focus on attracting and retaining members under 35 years of age.
4. We find that First Church is currently understaffed, according to generally accepted guidelines for the number of staff required for a congregation our size. We also find that our office space is inadequate. We recommend adding a second minister, making the Director of Membership and Development a full-time position and adding other program and support staff as finances permit. We recommend expanding office space to accommodate additional staff members.
5. We find that implementation of *Vision 2010* will require more money than our church currently budgets. We also find that our membership is financially able to support increased First Church expenses. We recommend that the Board retain a financial consultant to advise about appropriate ways to increase our income. We recommend that First Church make a focused effort to increase member pledges in the annual canvass and also consider additional fund-raising events such as a special *Vision 2010* fund-raising pledge campaign.

2. INTRODUCTION TO *VISION 2010*

In 2001, the Board of Trustees of the First Unitarian Society appointed the Strategic Planning Committee and directed it to create a set of specific long-term goals for First Church, called "*Vision 2010*." By the end of 2003, we expect to have a final version of *Vision 2010* approved by the Board and ready for action.

Vision 2010 will replace the "Vision 2000" goals, which, for the most part, have been achieved. "Vision 2000" was created in 1994 by a church-wide strategic planning process similar to the current process. "Vision 2000" resulted in a church consensus to work for several goals, including adding a second service, hiring the first-ever Director of Membership and Development, replacing the roof, restructuring the downstairs to provide separate classrooms, making the building fully accessible and making other improvements. The goals of "Vision 2000" have been largely accomplished, so we now need to formulate a new vision: *Vision 2010*.

The Strategic Planning Committee has been working for almost three years. The committee membership has changed over that period as original committee members moved on to other commitments and new members joined the committee. We are grateful for the contributions of former members of the committee Carl Junkerman, Laura Parrino-Byxbe, Mike Radtke, Nancy Spransy and Don Weimer. We owe a special debt to Cindy Eilers for her leadership as chair of the committee for almost two years. Current members of the committee are Jill Erickson, Rebecca Foerst-Becker, Drew Kennedy, Lu Krug, Gordie Mueller, Jeff Percy and Claire Weber, chair.

The Strategic Planning Committee presents this draft *Vision 2010* to the membership for the purposes of explaining the committee recommendations and inspiring discussion by the membership. The committee will then make final revisions, if any, and submit the report to the Board for adoption of a final *Vision 2010* before the end of 2003.

3. DRIVING QUESTIONS

The Strategic Planning Committee began its work by defining five driving questions around which *Vision 2010* would be developed. These questions helped us decide what information we needed to gather and what focus we wanted for *Vision 2010*.

Driving Question 1. How will First Church design experiences and services that meet a variety of spiritual and social needs while maintaining congregational unity?

Driving Question 2. What kinds of people in our community are we not reaching and shall we undertake an intentional effort to reach particular groups?

Driving Question 3. What presence shall First Church have outside of our four walls? (e.g., in the Milwaukee community, with the larger Unitarian Universalist community and in the world)

Driving Question 4. How shall First Church gather the resources to support the services and programs of First Church?

Driving Question 5. How shall we change our infrastructure to accommodate recent and anticipated numerical growth? Specifically: how will we provide for a weekend schedule for worship and education; increased staffing needs; changes in organizational structure; and the intentional identification, training and support of lay leaders?

4. PROCESS

Here are the ways that we gathered information to help us answer these driving questions:

At our **History and Chocolate Extravaganza** in November, 2002, we reviewed our personal church histories and how the church appeared to each of us when we joined. Then we identified some core themes and values that ran throughout our church history, regardless of when any one of us became a member. We learned that social activism and community outreach are important to many of us. We are a community of religious seekers who value freedom of thought. We learned that we believe that music, art and nature are important forms of spirituality.

Next, we held two **Breaking Bread, Building Community (BBBC)** events to provide an opportunity for members to learn about two important issues. The first topic was church growth: how a church grows, when and why it stops growing and how other churches deal with growth issues, such as adding a service. The Rev. Dan Hotchkiss, our planning consultant from the Alban Institute, explained that church attendance plateaus when Sunday attendance hits about 75 to 85% of capacity, and then begins to decline. To provide more opportunity for discussion, a second meeting about growth was also held. The second BBBC topic was diversity. Dan Hotchkiss gave the Sunday sermon about this important topic and he also facilitated the evening discussion. He told us that Unitarian Universalist churches that are active in social justice issues attract as mem-

bers people, including African-Americans, who agree with that church's focus on social justice values and activities.

The next church-wide event was **Future Talks** in Spring, 2003. At these small, facilitated discussions, members discussed their apprehensions and hopes for growth, change and goals for the future. Future Talks showed us that we needed more information and direction from the membership, so we created a **Membership Survey**, which was distributed to all 642 members of the congregation. We received 274 completed questionnaires by the deadline, which is a fabulous return rate of 42.7%. From this survey, we learned that our members are generally satisfied with First Church programming (including religious education), approve growing the membership by adding a third service and want to increase the social justice activities of First Church. The findings and recommendations of this *Vision 2010* are based on what we learned from the survey. The survey results are included in Section 9 of this report.

5. THE MISSION OF THE FIRST UNITARIAN SOCIETY OF MILWAUKEE

It may be helpful to remind ourselves of our stated mission, as was determined some years ago.

The First Unitarian Society of Milwaukee, guided by the principles of the Unitarian Universalist Association, is committed to:

- Celebrating our spiritual, cultural and philosophical diversity, regardless of gender and/or sexual orientation;
- Fostering a supportive inter-generational, multiracial community;
- Promoting education, personal growth, and ethical living within our congregation and in the larger community;
- Performing community service and working to achieve social justice and ecological responsibility; and
- Promoting Unitarian Universalism to ensure the future of our congregation and the growth of religious freedom.

This congregation affirms and promotes the full participation of persons in all of our activities without regard to race, color, gender, physical or mental challenge, affectional or sexual orientation, age, class or national origin. Indeed, we are actively interested in promoting more multicultural diversity within our congregation.

6. VISION 2010 VISION STATEMENT

The congregation of the First Unitarian Society is committed to furthering the Mission of the church through *Vision 2010*. We are called to:

- Share our unique spiritual home with those in Milwaukee who are searching for a faith community to share their spiritual journey.
- Provide community service and leadership for social justice in Milwaukee and in the greater communities of our nation and our world.
- Expand the experiences and opportunities that we offer to our current and future members to help them meet their spiritual needs and express their social justice concerns through religious education, social and intellectual interaction, weekly services, affinity groups, special projects and interpersonal support while remaining interconnected through a variety of small group opportunities.

In the year 2010, we expect that the First Unitarian Society will be somewhat different than it is today. Through *Vision 2010*, we seek to guide that change in a purposeful and positive direction rather than having change occur by default. *Vision 2010* means that, by the year 2010:

- We will have embraced growth to become a thriving and diverse religious community that provides membership in a liberal religious community to a significantly increased membership through at least three weekly worship services, greatly enhanced musical offerings and opportunities, and a kaleidoscope of programming for adult members. A robust religious education program will provide a variety of classes and growth experiences for children and youth.
- We will be actively participating in and spearheading an extensive range of social justice activities in Milwaukee and for our larger national and worldwide communities, making First Church a recognized leader in social justice work.
- We will have added ministerial and other staff and expanded office space to service our increased programming and support staff needs.
- We will have established predictable and stable revenue sources that meet our increased revenue requirements.

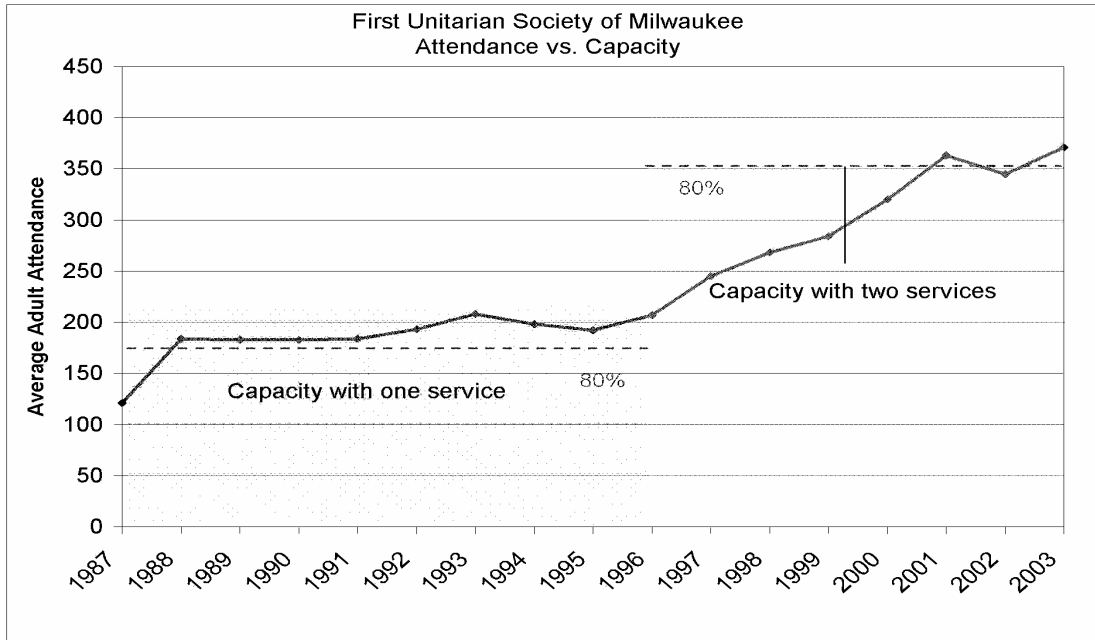
7. VISION 2010 FINDINGS AND GOALS

Vision 2010 covers five topics: Growth, Diversity, Social Justice, Staffing and Organization, and Finances. This report includes Findings and Goals for each topic.

Growth

Growth Findings.

Since we changed from one to two Sunday services in the fall of 1996, we have significantly increased our membership and our attendance on Sundays. Although there was some apprehension at the time, we successfully expanded to two services without losing any quality in Sunday services, music, Religious Education, Coffee Hours or Forums. However, attendance at the two Sunday sessions of religious education currently needs to be rebalanced.



Dan Hotchkiss

Our planning consultant tells us that when a congregation fills 75 to 85% of its available space at services, the attendance, membership and revenue will cease growing, plateau and begin to decline. Our Sunday attendance has been at or over 80% of capacity for the last four years. Thus we find that we are at an attendance plateau. Unless we take action, a membership and financial plateau and decline are likely to follow.

The survey showed us that members have a positive attitude toward future membership growth. Over 88% of members either find the idea of growth exciting or want First Church to grow despite some negatives that might come with growth. In order to continue to serve both our members and the larger community, we find that First Church should consciously embrace membership growth.

The survey shows that 66% of members want to support future growth by planning for a third service. The next most popular survey response, only 13%, was to start a new congregation. We therefore find that First Church should add a third service. The purposes of the third worship service are to alleviate the overcrowding of the current Sunday morning services and to accommodate increased membership.

We are currently working to ensure that each visitor meets and talks with a church member. Chalice Circles have recently instituted a program to greet visitors one-to-one on Sunday mornings. In order to keep the church intimate and richly connected as we grow, it will be increasingly important for us to facilitate many small groups that members can join and where we will come to truly know one another.

Growth Goals.

Goal 1. The Board should appoint a third service development committee to explore the timing and other issues related to a third service with an operational date for the third service of Fall, 2007. We expect the staff to play an important role in the planning and implementation of a third service.

Goal 2. The third worship service should be substantially equivalent to the two current Sunday services. By “substantially equivalent” we mean that each of the three services **must** provide all of the following:

- Single sermon preparation (same minister uses same sermon in all three services)
- Professionally-led music
- A full service, not a “vespers”-type service
- An adult-oriented service, with occasional family services as at present
- An appropriate program of religious education for children and youth. This could be our current RE program or something different, but should be more than child care.
- A Coffee Hour

Any or all of the three services **may** also include the following components, depending on membership preferences and logistical requirements:

- A religious education program for children and youth similar to our current offerings
- Access to a Forum program
- Volunteer offerings and support, such as the Book Table, Social Concerns Table, etc.
- Religious education program for adults

Goal 3. The exact time and day of the week for each of the three services should be determined after membership consultation shows that attendance will be approximately equal at each of the three services. (This is how the times of the current two Sunday services were established.)

Goal 4. The Board, in cooperation with the Director of Religious Education, should appoint a task force of religious education to identify the programmatic issues and options related to a third service and expanded RE services for children and youth.

Goal 5. Our membership should grow to 900 adult members with a total average attendance at all three services of 500 members. There should be 300 children and youth enrolled in the religious education program with an average weekly RE attendance of 150.

Attendance/membership statistics projections:

Research shows: Attendance plateaus at 80% full church capacity
Full First Church sanctuary capacity = 220 people

Attendance at two services: Full church = 440 capacity
80% of full church = 352 attendance
Actual 2-service attendance (average last 4 yrs) = 357

Attendance at three services: Full church = 660 capacity
80% of full church = 528 attendance
Projected future 3-service attendance = 528

Membership: when 2-service attendance is 357, current membership is 642
Membership: when 3-service attendance is 528, projected membership is 900

Goal 6. We should expand our program of identifying visitors, helping them learn about Unitarian Universalism and First Church and making them feel comfortable at First Church.

Goal 7. We should implement a more structured staff and membership effort to educate and support new members and bring them into those church activities and groups that will be most meaningful to them.

Goal 8. We should consciously develop and expand more small groups devoted to a wide range of spiritual, social, educational, artistic and entertainment needs and interests.

Diversity

Diversity Findings.

Like most Unitarian Universalist congregations, our survey shows that we are a racially and culturally homogenous community that is aging. In 1993, 10% of our members were under 35 years of age and 2% were 65 or older. Our recent survey shows that 9% of us are now under 35 and 6% of us are 75 or older. The survey also showed that, although about half of us are satisfied with our current programming and worship, 24% of us would like First Church to reach out more to young people, ages 18 to 35 years. (All other specific responses to the outreach question were 5% or less.)

Data from other urban Unitarian Universalist churches and from our consultant shows that a deliberate program to recruit more African-Americans as church members is usually not successful. Such Unitarian Universalist recruitment programs sometimes focus on African-American individuals who are already members of those urban churches with whom Unitarian Universalists cooperatively work on social justice issues. This puts Uni-

tarian Universalist churches in direct competition for members with our religious friends and neighbors. Data also shows that Unitarian Universalist churches that are active in social justice issues attract as members those African-Americans and others who agree with the Unitarian Universalist primary focus on social justice, so that congregational diversity occurs as a by-product of Unitarian Universalist values and actions.

Our survey shows that we consider diversity to be an important First Church value. The survey also shows that First Church members generally believe that new members will join because they agree with our values. Sixty-nine percent of surveyed members believe that “how we act in the community is more important than how we look.” An additional 15% agreed that “we are a church of...people attracted to this supportive environment without conscious distinction based on demographic diversity. Diversity is a by-product of who we are, not a goal to be achieved.” We find that our present membership supports diversity and believes it is most effectively and appropriately addressed by heightening our focus on social action issues, which will serve the diverse Milwaukee community and attract diverse persons who share our Unitarian Universalist values.

Diversity Goals.

Goal 9. First Church should expand its commitment to community involvement and social justice, including fighting racism in the community, in the belief that these activities and values will not only be good for our larger community but will also attract diverse people who will find a spiritual home at First Church. We also recommend an increased staff focus on social justice activities (see Goal 11).

Goal 10. We should institute an increased focus on young adult programming that attracts and serves persons under 35 years of age. As additional staff are hired, a staff member should devote time and effort to this project. The staff person should work together with members who share an age or interest in this endeavor. This goal should be considered when hiring a second minister.

Social Justice

Social Justice Findings.

Eighty-five percent of the members who replied to the survey supported First Church participation in a “full range” of social justice activities, including education, service, witness and advocacy. This demonstrates overwhelming support for an active First Church presence in social justice work. We find that First Church activity in the area of social justice is extremely important to our membership.

Social Justice Goals.

Goal 11. We recommend that First Church make an even greater commitment to social action involvement to address the social justice needs of the greater Milwaukee community, our nation and the world. Specifically, First Church should:

- Encourage the development of the newly emerging Social Justice Council, distinct from the Social Concerns Committee.
- Encourage the Social Justice Council to identify a range of social action issues that can be promoted in Milwaukee, including the full range of education, service, witness and advocacy activities.
- Coordinate the social action issues of the Unitarian Universalist Association with our Social Justice Council.
- Focus a significant portion of the time of a new staff member on social justice activities. Which staff member will have this responsibility will depend on the skills and interests of the individuals hired.

Staffing and Organization

Staffing and Organization Findings.

The strategic planning consultant and other experts on church staffing generally calculate minimum church staff requirements according to the following formula:

- One program staffer for each 100 members who attend services.
- One program staffer for each 50 children and youth who attend religious education classes.
- One support staffer for each two program staffers.

First Church currently (2002-03) has an average Sunday service attendance of 350 and an average religious education attendance of 104 children and youth. According to the recommended staff/membership formula, we should have at least five program staffers and 2.5 support staff to meet our existing needs. However, we only have the following 2.75 program staff members and 2.5 support staffers:

- One full-time minister
- One full-time Director of Religious Education
- One three-quarters time Director of Membership and Development
- One full-time Secretary
- One full-time Church Administrator
- One half-time RE Assistant

According to these standards, we are already short of staff.

Another consultant, The Rev. Michael Schuler of First Church in Madison, has advised First Church staff about church growth and other issues. He has determined that we are currently understaffed by two people and we are not sufficiently staffed to even maintain our current level. He recommends a second minister for congregations with 500 or more members and we already have 642 members. This recommended staffing level was confirmed by the department of congregational services at the Unitarian UniversalistA.

We, therefore, find that we are currently understaffed and we need to expand our professional staff, both to support our current needs and to support *Vision 2010* with its

move to three services. This staff expansion should include a second minister. The search for this assistant or associate minister should probably be conducted in 2005-06 and the new minister should be brought in around fall, 2006.

Over the past few years, we have added new staff without adding any new office space. Adding office space upstairs in our apartment building was considered in "Vision 2000" but was eliminated for financial reasons. Staff offices are now more compressed than ever. The Director of Membership and Development occupies an "office" only slightly larger than the space allocated for the copy machine. We will need more office space for a full-time Director of Membership and Development, a second minister and other new staff. We therefore find that more office space will be needed to accommodate the recommended staff expansions.

As we grow in membership and staff, we will need more volunteers and lay leaders to work with staff and to facilitate the work of First Church. Other large churches have already implemented various organizational structures and practices to more effectively use staff, develop lay leadership and maintain personal relationships in a growing church. We find that we should research how other Unitarian Universalist churches modify their organization and practices to deal with growth to determine what changes may be most appropriate for a growing First Church.

The Board is on record in support of having a ministerial intern every other year, but we do not currently have an intern and cannot plan to have another before 2007. We find that the presence of a ministerial intern has been valuable for First Church in the past and should be reinstated as soon as financially possible.

Staffing and Organization Goals.

Goal 12. First Church should expand staff as follows:

Before implementing a third service:

- Recruit and hire an assistant or associate minister. The expected timeframe would have the search process in 2005-06 and a new minister at First Church about fall of 2006.
- Make the Director of Membership and Development position, currently a three-quarters position, a full-time position
- Add a half-time office-administrative support position

Before or at the same time as implementing a third service:

- Add RE support staff: one-fourth time for youth/coming of age
- Add RE support staff one-half time administrative support
- Add one-fourth time music staff
- Upgrade Assistant Facilities Coordinator hours and personnel

After implementing a third service:

- Add an Intern Minister

- Add a staff Volunteer Coordinator
- Provide a young adult ministry and a youth and coming of age ministry
- Add a staff assistant to the Church Administrator
- Add a Facilities Coordinator

As new staff are added, we should increase staff attention to small group development, adult education, visitor and membership retention, volunteer recruitment, youth and young adult programming, children's religious education, pastoral care support, leadership development, social justice activities and church administration.

Goal 13. The Board should appoint a ministerial search committee to put together a First Church recruitment packet, establish a search process and schedule, consider whether to recruit an assistant, associate or other category of minister and address all other issues related to recruitment. This should be done in fall of 2004 to facilitate actual recruitment in 2005-06.

Goal 14. First Church should expand staff offices as follows:

- Provide office space for a second minister.
- Provide office space for other new staff members as needed.
- Consider converting apartment(s) into office space as needed.

Goal 15. The Board should research how similarly-situated churches, both Unitarian Universalist and other denominations, have changed their staffing and organizational structure to handle membership growth. We should also research how other churches, Unitarian Universalist in particular, identify, train and support the larger number of lay leaders that are required by expanded programming and services. The research should include the large Madison and Appleton Unitarian Universalist churches, each of which currently offers three services. Appropriate organizational changes should be implemented.

Goal 16. First Church should set aside funds each year in an intern account to ensure that First Church continues to host ministerial interns.

Finances

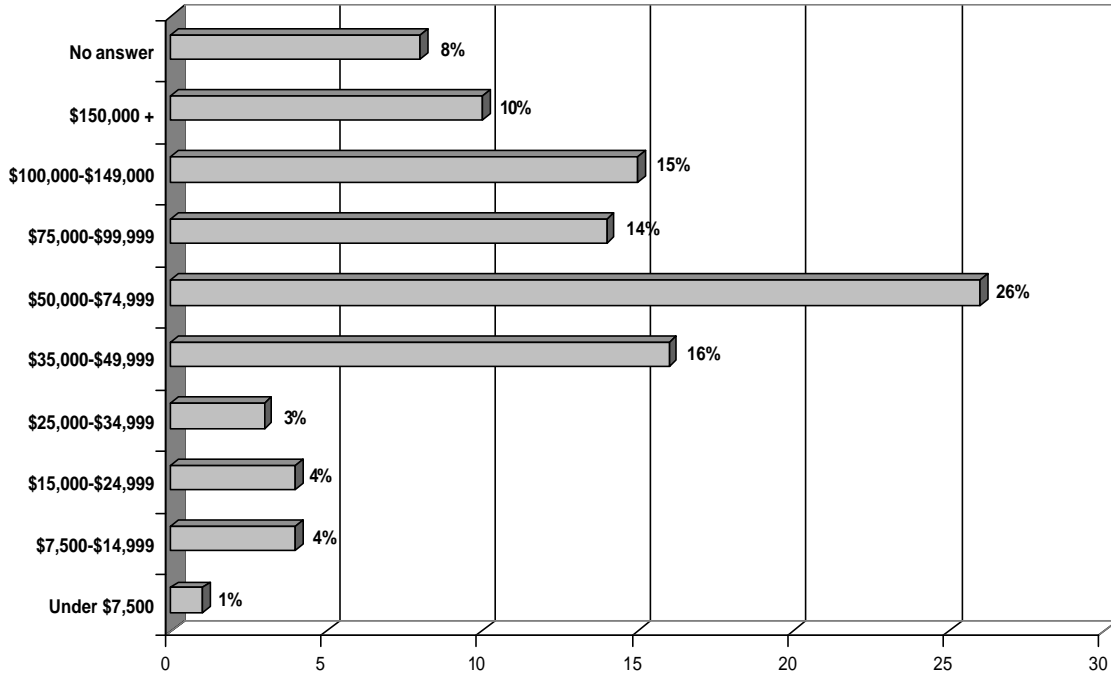
Finances Findings.

We currently support our infrastructure, staff and activities through an annual pledge drive (canvass) in which members make a financial commitment to First Church for the coming year. We fund special projects, such as "Vision 2000," with special fund-raising campaigns. Our annual canvass has seen modest increases in recent years and we know that many of our members also support a variety of social justice and charitable causes.

We were stunned by the financial results of our survey. We learned that First Church has a relatively wealthy membership. Slightly over 25% of our surveyed members report

annual household earnings greater than \$100,000. The survey showed an annual household income for 10% of our members greater than \$150,000. Based on the survey and despite a somewhat uncertain economic situation, we find that our members as a group are financially capable of supporting an increased financial commitment to First Church.

Household Income



We find that implementation of *Vision 2010* will require us to raise additional funds in the approximate amount of \$711,650 over the next five years. Section 8 of this report sets forth the projected year by year costs of *Vision 2010*.

We also find that First Church has restricted its fund-raising to seeking pledges from members for ongoing work or special projects such as capital improvements. As we become a corporate-sized church, we find that we need more information about how other large churches deal with finances and fund-raising.

Finances Goals.

Goal 17. The Board should retain a consultant who has expertise in church financial matters, including annual membership fund-raising, investments and other fiscal issues. The focus of his or her work will be to help us determine what revenue-enhancement methods are appropriate for our membership to establish predictable and stable revenue sources that meet our increased revenue requirements and help us achieve *Vision 2010*.

If possible, the consultant should be experienced in working with Unitarian Universalists on financial and giving issues.

Goal 18. The Board, or a special financial development committee appointed by the Board, should consider the financial requirements of *Vision 2010* and research a variety of ways to provide a predictable and stable revenue stream to meet our increased financial requirements. Research should include learning how growing Unitarian Universalist churches of our size have met this challenge. We should consider meeting our financial needs through a variety of means, including a special congregational fund-raising campaign, new kinds of fund-raising events, deliberate marketing to segments within the congregation, fund-raising based on participation in First Church activities or other strategies.

Goal 19. First Church should embark on a special *Vision 2010* fundraising campaign designed to add staff and provide more office space, build programs targeted to congregational needs, and develop a governance structure that support those needs.

Goal 20. The Board should consider making *Vision 2010* a financial priority for First Church and directing to *Vision 2010* projects all bequests that are not specified for other church purposes.

8. COST OF VISION 2010

First Unitarian Society of Milwaukee Vision 2010 Timeline & Estimate Costs to Fund Anticipated Growth

Description	Time Frame	Estimated Cost
<u>Fiscal Year 2004-2005</u>		
New - cost for a fund raiser consultant	Fiscal year 2004-05	\$25,000
New - 1/2 clerical support staff (salary & FICA)	Fiscal year 2004-05	\$11,200
New - DMD becomes full-time	Fiscal year 2004-05	9,500
New - form search committee for a 2nd minister	Fiscal year 2004-05	1,000
Total additional cost for 2004/2005 fiscal year		\$46,700
<u>Fiscal Year 2005-2006</u>		
New - perform search for an 2nd minister	Fiscal year 2005-06	6,500
Carryover - 1/2 clerical support staff (salary & FICA)	Fiscal year 2005-06	11,700
Carryover - costs for DMD (from prior year + adjustment)	Fiscal year 2005-06	9,900
Total additional cost for 2005/2006 fiscal year		\$28,100
<u>Fiscal Year 2006-2007</u>		
New - hire 2nd minister (salary & benefits incl. health ins.)	Fiscal year 2006-07	\$62,600
New - loss of rent for an apartment rent	Fiscal year 2006-07	5,400
New - purchase computer, software & office furniture	Fiscal year 2006-07	5,250
New - professional expenses	Fiscal year 2006-07	5,250
New - part-time R/E support (salary & FICA)	Jan-07	13,500
Carryover - 1/2 clerical support staff (salary & FICA)	Fiscal year 2006-07	12,200
Carryover - costs for DMD (from prior year + adjustment)	Fiscal year 2006-07	10,300
Total additional cost for 2006/2007 fiscal year		\$114,500

THIRD SERVICE BEGINS — FALL 2007

<u>Fiscal Year 2007-2008</u>		
New - hire add'l program staff (salary & benefits incl. health ins.)	Fiscal year 2007-08	\$52,500
New - extra comp for music directors	Fiscal year 2007-08	11,850
New - escrow for intern minister	Fiscal year 2007-08	10,500
New - hire an add'l AFC	Fiscal year 2007-08	7,300
New - purchase computer, software & office furniture	Fiscal year 2007-08	5,500
Carryover - cost for 2nd minister (full year + pension)	Fiscal year 2007-08	70,500

Carryover - part-time R/E support (salary & FICA)	Fiscal year 2007-08	29,100
Carryover - 1/2 clerical support staff (salary & FICA)	Fiscal year 2007-08	12,700
Carryover + new - loss of rent for (2) apartments	Fiscal year 2007-08	11,200
Carryover - costs for DMD (from prior year + adjustment)	Fiscal year 2007-08	10,700
Carryover + new - professional expenses	Fiscal year 2007-08	6,500
Total additional cost for 2007-2008 fiscal year		<u>\$228,350</u>

Fiscal Year 2008-2009

New - hire an Ass't Administrator (salary & benefits incl. ins.)	Fiscal year 2008-09	\$47,650
New - purchase computer, software & office furniture	Fiscal year 2008-09	5,750
Carryover - cost for 2nd minister (full year + pension)	Fiscal year 2008-09	72,850
Carryover - add'l program staff (full year + pension)	Fiscal year 2008-09	57,900
Carryover - part-time R/E support (salary & FICA)	Fiscal year 2008-09	30,250
Carryover + new - loss of rent for (3) apartments	Fiscal year 2008-09	17,400
Carryover - 1/2 clerical support staff (salary & FICA)	Fiscal year 2008-09	13,150
Carryover - extra comp for music directors	Fiscal year 2008-09	12,300
Carryover - costs for DMD (from prior year + adjustment)	Fiscal year 2008-09	11,100
Carry over - cost of intern minister (less escrow)	Fiscal year 2008-09	10,500
Carry over - cost for an add'l AFC (salary & FICA)	Fiscal year 2008-09	7,650
Carryover + new - professional expenses	Fiscal year 2008-09	7,500
Total additional cost for 2007-2008 fiscal year		<u>\$294,000</u>

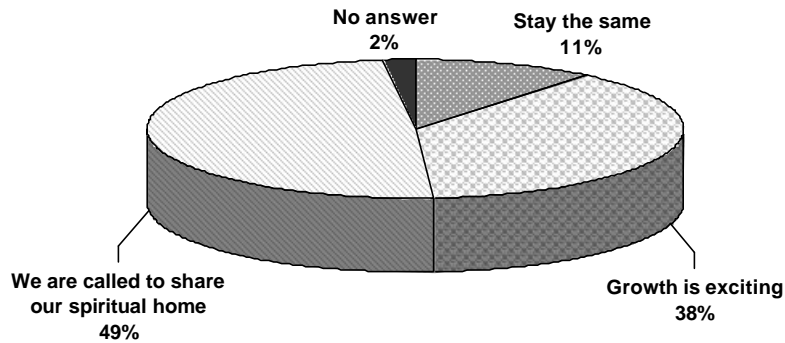
Grand total additional cost for (5) years

\$711,650

9. 2003 MEMBERSHIP SURVEY

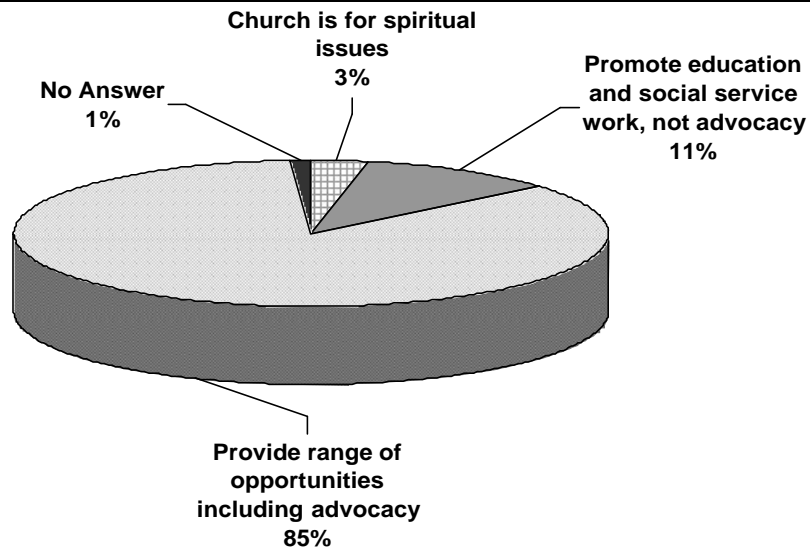
Attitude about congregational growth

I greatly fear increased First Church size so I prefer we stay the same or get smaller.	11%
Growth is exciting – it means more choices.	38%
Growth may bring negatives but we are called to share our spiritual home with others.	49%
No answer.	2%



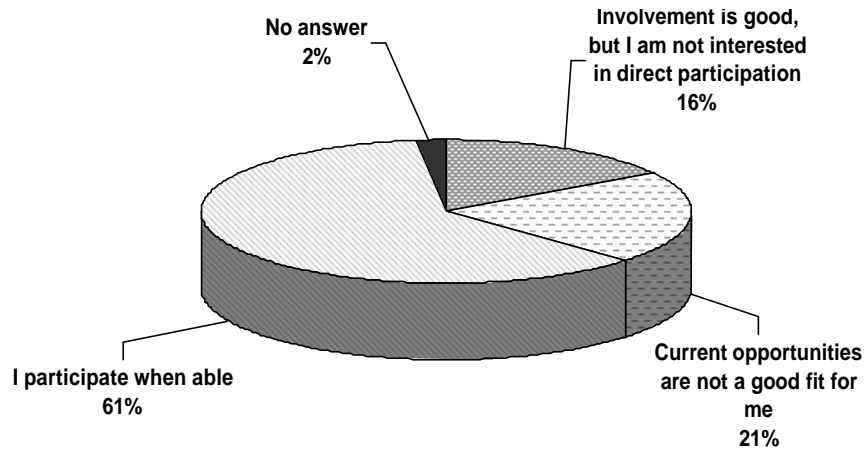
Social justice in the church

Social justice is important, but the church is for spiritual issues not social justice work — we may wish to encourage such work but not here at church.	3%
Social justice is important part of our church — we should actively promote education and social service work, not witness and advocacy activities.	11%
Social justice is important part of church – we should actively provide range of opportunities, including education, social service, witness and advocacy.	85%
No answer.	1%



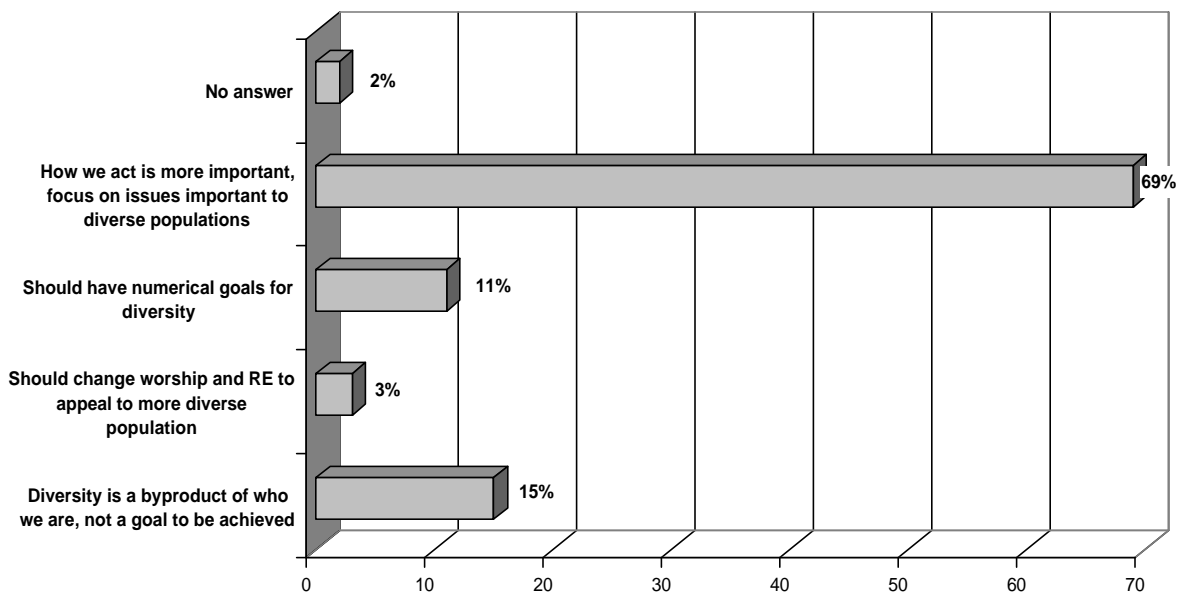
Social justice participation

Church involvement in social justice is good, but I am not able or interested in participating directly.	16%
Church involvement is good — I'd like to be more involved, but church opportunities are not a good fit for me.	21%
Social justice opportunities at church are good and I participate when able.	61%
No answer.	2%



Diversity

We are attracted to this church without conscious distinction based on diversity — diversity is byproduct of who we are, not goal to be achieved.	15%
Gaining diversity is important-should change worship and RE to develop a content and style that appeals to more diverse population.	3%
Diversity is strong value and should be reflected in numerical goals for our attendance — we should market worship and RE to attract more diverse population.	11%
Diversity is strong value but how we act is more important — should focus on issues that are important to us and to diverse populations in city, such as MICAH, Hunger Task Force, etc.	69%
No answer.	2%

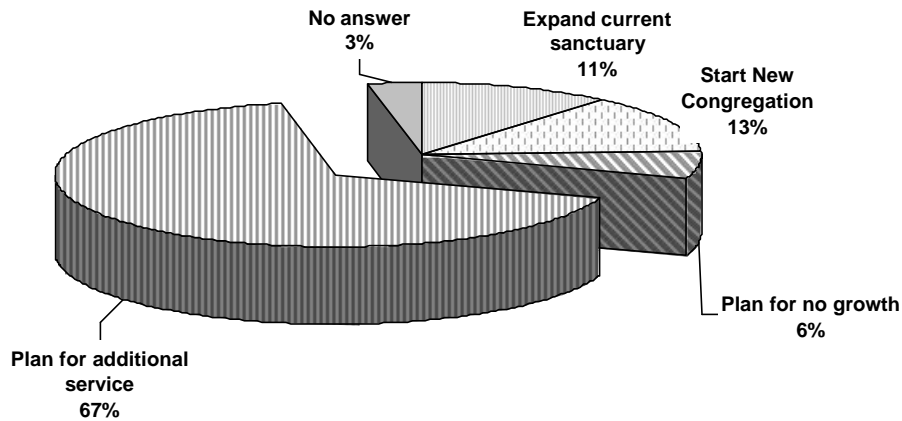


Third service? We should

Somehow expand our current sanctuary seating capacity.	11%
Start new congregation – sizeable number of current members leave First Church to start new church.	13%
Plan for no growth in congregation.	6%
Plan for an additional service.	66%
No answer.	3%

Of members who chose option to start new congregation:

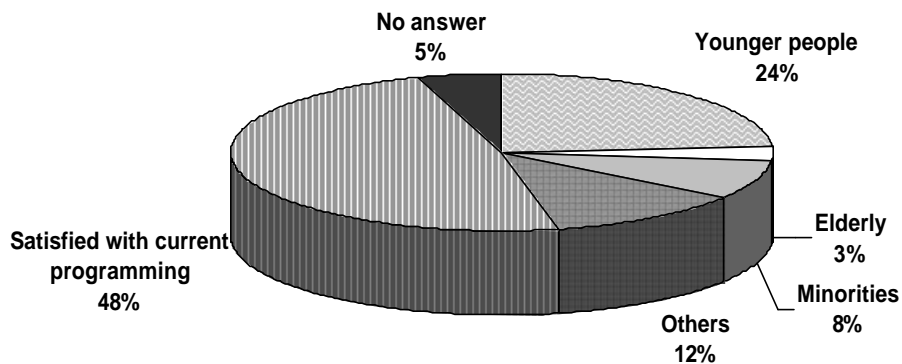
Willing to leave First Church to start new congregation.	44%
Not willing to leave First Church to start new congregation.	42%
No answer.	14%



Reaching out to others...

We should reach out to others who we are not currently seeing in our midst by offering programming and/or worship that focuses on addressing the needs of

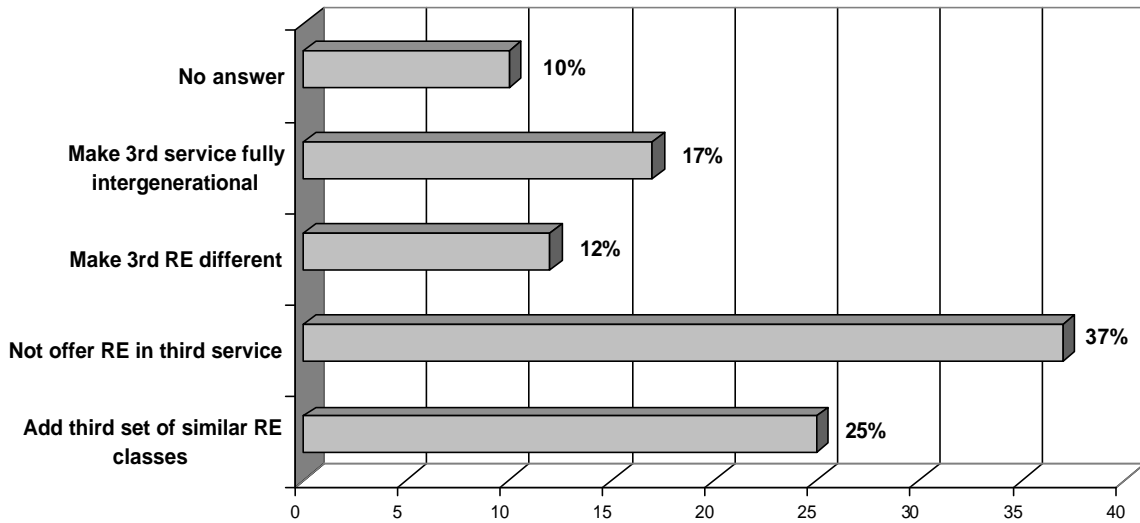
Younger people (18 to 35 years).	24%
Elderly.	3%
African-Americans.	5%
Hispanics.	3%
Others. (Almost all "Others" replies said we should reach out to all people)	12%
I am satisfied with current range of worship and programming.	49%
No answer.	5%



Religious education

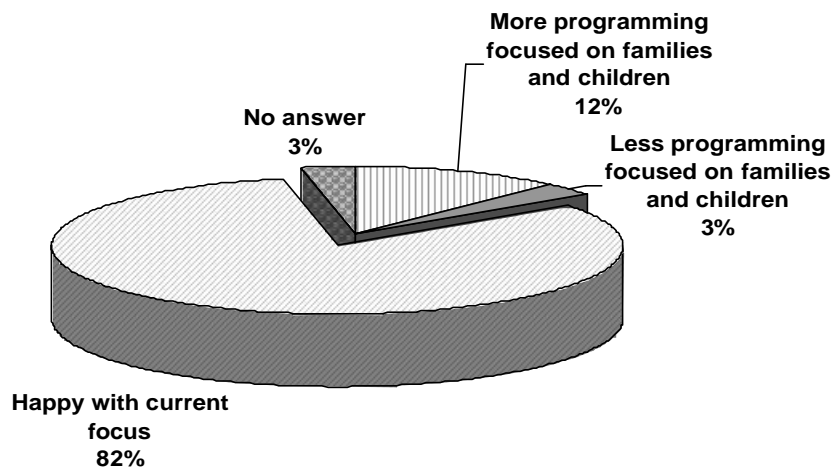
Our Sunday RE classes are overcrowded at 9:15 and under filled at 11:15. If we add a third service that is substantially similar to existing services, we should:

Add third set of RE classes similar to current classes.	25%
Not offer RE during third service so we can adequately support two RE sessions.	37%
Keep two RE programs as they are-make third service RE quite different.	12%
Make third service fully intergenerational (children stay with parents) every week.	17%
No answer.	10%



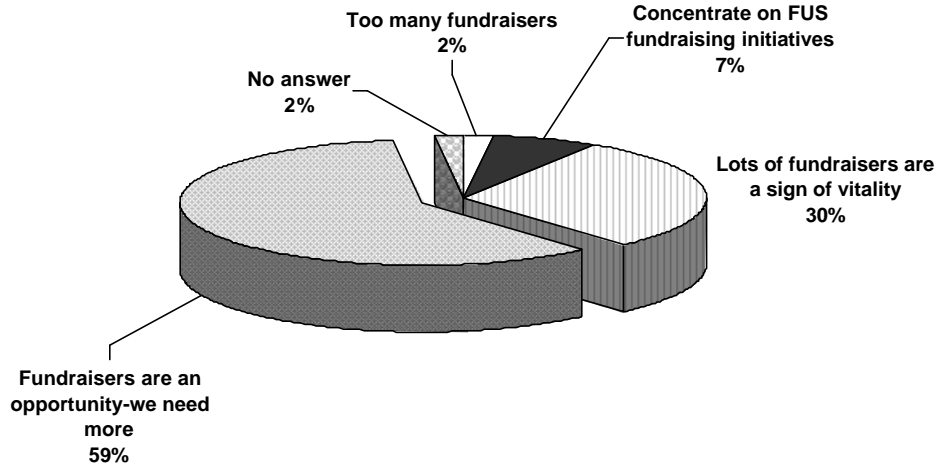
Family focus

We need more programming focus on families and children.	12%
We need less programming focus on families and children.	3%
I'm happy with current programming focus on families and children.	82%
No answer.	3%



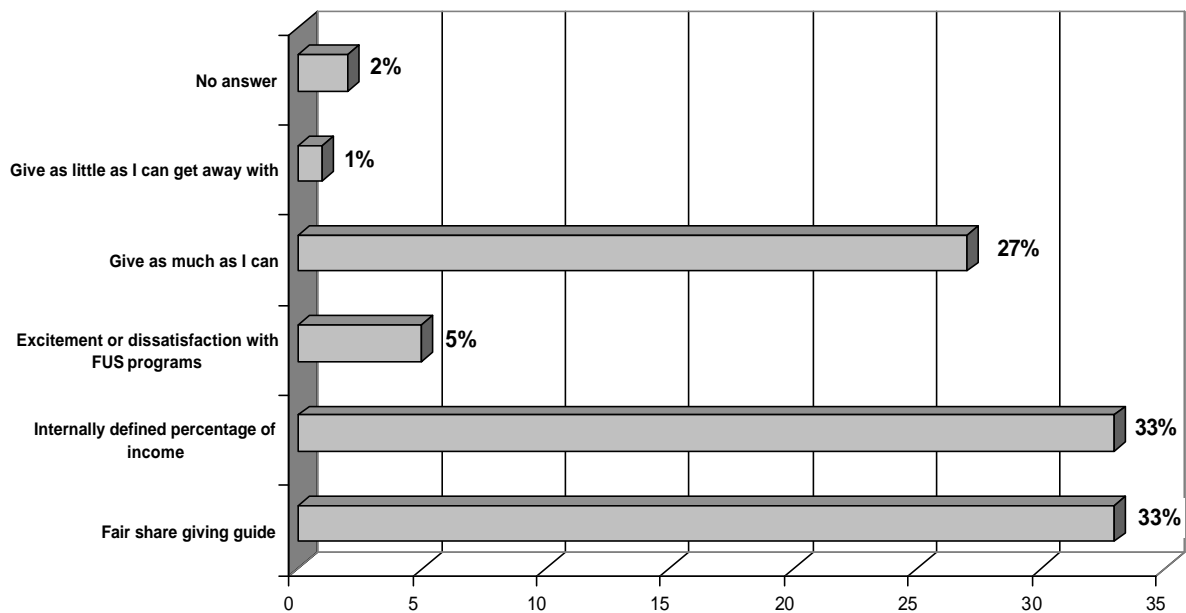
Attitude toward giving

Too many fundraisers and causes — hard to keep them all straight.	2%
Should reduce non-First Church fundraisers — concentrate on First Church initiatives.	7%
Lots of fundraisers are sign of active and vibrant community.	30%
Fundraisers are opportunity to share — the more the better — I can always choose not to give.	60%
No answer.	2%



With respect to our annual pledge drive, I base my giving on

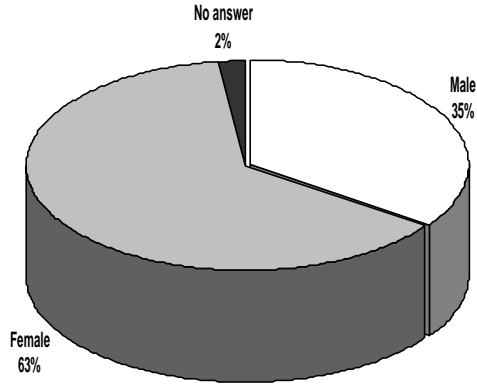
Fair Share Giving Guide or Canvas Committee's recommended percentage of income and what I can afford.	33%
My own, internally defined percentage of income.	33%
How excited or dissatisfied I am with First Church programs.	5%
Give as much as I can.	27%
Give as little as I can respectfully get away with.	1%
No answer.	2%



DEMOGRAPHIC INFORMATION ABOUT OUR MEMBERSHIP

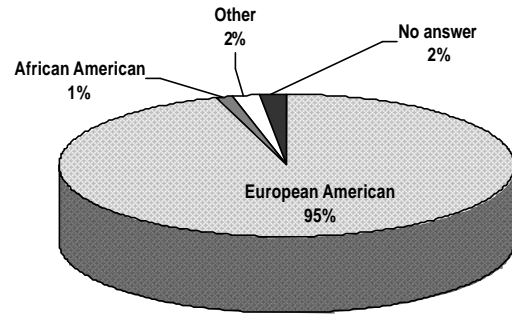
Gender

Male	35%
Female	64%
No answer	2%



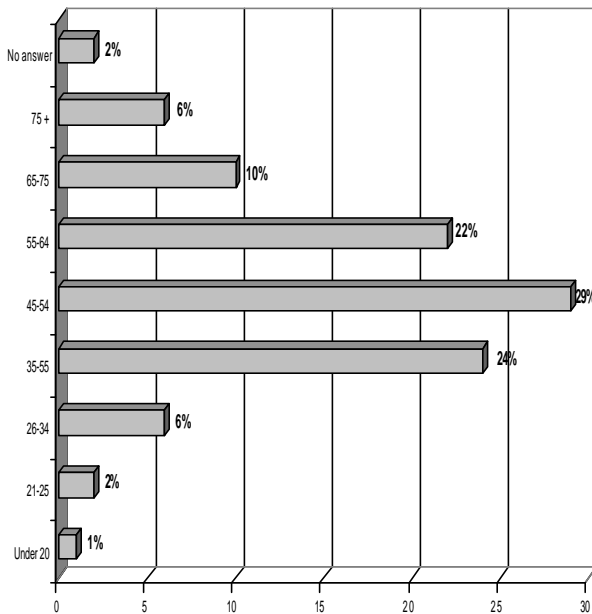
Ethnicity

European American	95%
African American	1%
Other	2%
No answer	2%



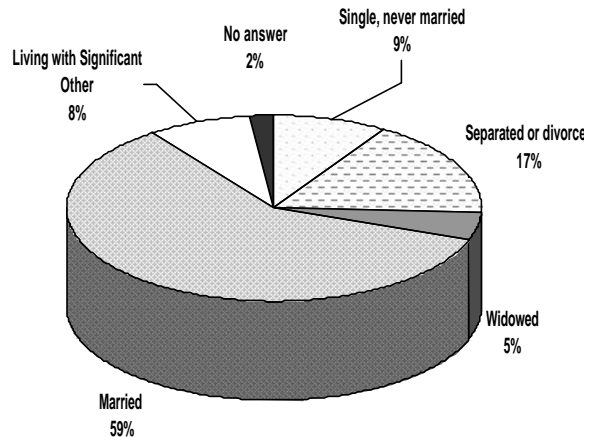
Age

Under 20 years	<1%
21-25 years	2%
26-34 years	6%
35-44 years	24%
45-54 years	29%
55-64 years	22%
65-75 years	10%
75 years or older	6%
No answer	2%



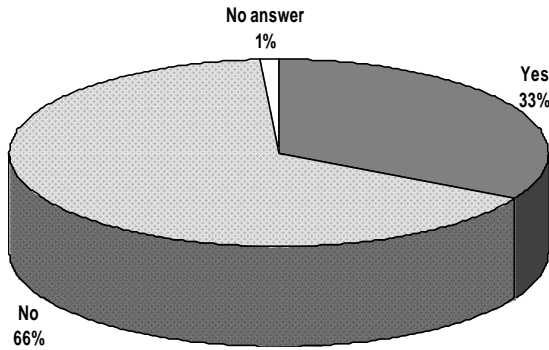
Marital Status

Single, never married	9%
Separated or divorced	17%
Widowed	5%
Married	60%
Living with "significant other"	8%
No answer	2%



Do You Have Children?

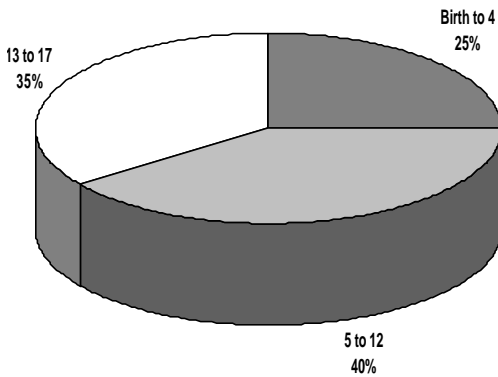
Yes	33%
No	66%
No answer	1%



Ages of children

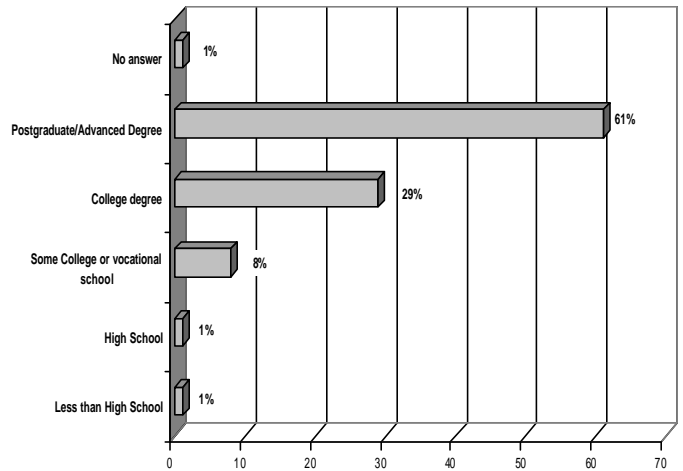
(some families have children in more than one age range)

Birth to 4 years	10%
5 to 12 years	16%
13 to 17 years	14%



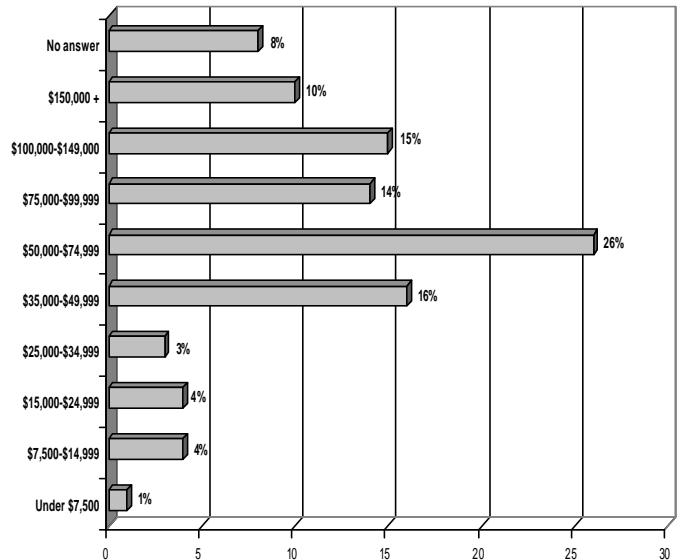
Your highest level of education

Less than high school graduate	<1%
High school graduate	1%
Some college, trade or vocational school	8%
College degree	29%
Postgraduate work or advanced degree	61%
No answer	1%



Household income range (family or single living alone)

Under \$7,500	1%
\$7,500 - \$14,999	4%
\$15,000 - \$24,999	4%
\$25,000 - \$34,999	3%
\$35,000 - \$49,999	16%
\$50,000 - \$74,999	26%
\$75,000 - \$99,999	14%
\$100,000 - \$149,999	15%
\$150,000 or more	10%
No answer	8%



Years of First Church membership

One year or less	12%
2 to 4 years	26%
5 to 9 years	27%
10 to 19 years	21%
20 or more years	12%
No answer	2%

