

UUCSC, Five Year Plan

Area of Focus	First Year 7/1/05 – 6/30/06	Second Year 7/1/06 – 6/30/07	Third Year 7/1/07 – 6/30/08	Fourth Year 7/1/08 – 6/30/09	Fifth Year 7/1/09 – 6/30/10
<p>Ministry (including Intern Minister, Shared Ministry and Caring activities) Janet</p>	<p>(1) The VP of Finance prepares a budget that will increase minister's salary & benefits to remain attractive & meet "fair compensation" criteria.</p> <p>(2) Caring Committee to continue caring activities in accordance with Caring Committee purpose and mission: to assist and support UUCSC community members during meaningful life events. (3) The board will develop procedures and bylaw changes to establish the position of Affiliate Community Minister.</p> <p>(3) The congregation will continue to provide a Committee on Shared Ministry to monitor minister-congregation relationships.</p> <p>The congregation will provide financial support to fulfill its commitment to being a fair compensation congregation for all paid staff, including additional merit increases based on performance.</p>	<p>The Worship Committee and Committee on Shared Ministry will prepare for the minister's 4-month sabbatical. Cost: four months x \$750 for speakers; \$3000 budget impact.</p> <p>The congregation will provide financial support to fulfill its commitment to being a fair compensation congregation for all paid staff, including additional merit increases based on performance.</p>	<p>New minister search as/if needed. Add intern & budget accordingly, based on UUA salary guideline of \$XX.XX.</p> <p>Expand the role of the Caring Committee and provide training in "lay pastoral care" so the Caring Committee can take on some of the minister's duties and budget accordingly.</p> <p>The congregation will provide financial support to fulfill its commitment to being a fair compensation congregation for all paid staff, including additional merit increases based on performance.</p>	<p>New minister in place, if needed.</p> <p>The congregation will provide financial support to fulfill its commitment to being a fair compensation congregation for all paid staff, including additional merit increases based on performance.</p>	<p>Start search for second intern, determine appropriate salary and budget accordingly.</p> <p>The congregation will provide financial support to fulfill its commitment to being a fair compensation congregation for all paid staff, including additional merit increases based on performance.</p>

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<p>Governance (including Board, Committees, bylaws and operating policies and procedures) John Alcorn Committees are: Aesthetics, Building Maintenance, Bursar, Caring Network, Canvass, Capital Campaign, Children's Religious Exploration, Choir, Committee on Shared Ministry, Comprehensive Planning, New Facility Committee, Membership, Social Action, Snack Coordinator, Ways and Means, Worship, Publicity and Hospitality.</p>	<p>The Board will develop a coherent structure for governance and committees in line w. UUCSC mission & 7 UU principles. The VP of Operations will develop plan to assess each committee quarterly, to assure activities are in line w. overall plan & mission & goals.</p> <p>1. The VP of Operations will staff committee appropriately based on guidelines from Board.</p> <p>2. The VP of Operations will lead monthly Coordinating Council meetings to assure all activities & committees align with our mission and UU principles.</p> <p>3. The VP of Operations will receive suggestions and new ideas from the congregation for activities and forward to the appropriate committee.</p> <p>4. Comprehensive Planning Committee member to attend Coordinating Council meetings to monitor committee activities and to ensure that activities are in line with/implementation of overall plan, mission and goals.</p>	<p>Committee Chairs to hold regular meetings with committee members (quarterly/monthly or more frequently as needed).</p> <p>The VP of Operations will communicate significant accomplishments to the congregation through the UUCSC newsletter, web page, and the Annual Report. activities in each committee to congregation. Communication medium to be determined.</p>	<p>Work with UUA Consultant to select, and begin to implement, an appropriate governance structure.</p>	<p>The Coordinating Council operates as an Executive Committee freeing the Board and Minister(s) from day-to-day operations of the facility and congregation.</p>	<p>Fully implement new governance structure based on Policy Governance consultant recommendations.</p> <p>Continue Coordinating Council meetings and oversight.</p> <p>Direct the congregation under Policy Governance principles.</p>

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<p>Facility/Property, Existing (including building maintenance, janitorial, cleaning, upkeep and aesthetics)</p>	<p>Continue with rental, negotiating best rate with landlord.</p> <p>Continue with volunteer janitorial coordinator.</p> <p>Continue looking for suitable renters for existing space (e.g., AA, day care, Sierra Club, other organizations, etc.)</p> <p>Work with Board of Directors to assess renters a fee for cleaning as part of their rental agreement.</p> <p>Continue arrangement with local artists to continue to display their works in our social hall on a rotating basis.</p> <p>Continue work of current Aesthetics Committee to maintain a dignified, neat and appealing "look" to the best extent we can without major expenditures of funds.</p> <p>New Facility Chair to complete committee charter, including assessment of minimum space needs for current congregation activities.</p>	<p>New Facility Chair to consider alternate interim, lower cost, space rental to reduce rental costs to devote income to New Facility (e.g. eliminating or switching to less square footage in our current facility or sharing space with another congregation)</p>			

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<p>Real Estate, Facility & Grounds, New Janet</p>	<p>Work with UUA consultant to start capital campaign.</p> <p>Actively pursue search for another site, in conjunction with advice and input from New Facility/Real Estate Committee. The New Facility Chair will coordinate the applications for first home grant from UUA. Determine if sites are available with lease/option to buy.</p> <p>New Facility Chair to develop comprehensive "pro forma" checklist of desired features for assessing properties as they become available. Use input from New Facility Committee and data compiled from cottage meetings in 2003 and "old" five year plan to get started on this.</p> <p>The VP of Operations to establish new position of Rental Coordinator to lease space according to the UUCSC Rental Policy and manage rental issues. The Rental Coordinator will develop a plan to solicit renters for open time slots, particularly weekdays.</p>	<p>The New Facility Chair will determine the availability of church or other appropriate sites for lease or option to buy.</p> <p>Continue leasing to appropriate parties.</p>	<p>VP of Finance to budget for cleaning service and begin reserve accounts for future expenses for replacement of furnace, roof, etc.</p> <p>Continue leasing to appropriate parties.</p>	<p>The congregation will approve the purchase of a building or site.</p> <p>Continue leasing to appropriate parties.</p>	<p>Move into new home/site by Christmas 2009.</p> <p>Budget for cleaning service for new facility to maintain buildings and grounds.</p> <p>VP of Finance to begin planning for second capital campaign.</p> <p>Continue leasing to appropriate parties.</p>

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<p>Membership, Membership Retention and Hospitality to Guests/New Members Connie, Rosy</p> <p>The Membership Chair to develop and implement structured member progression path/plan.</p> <p>The Membership Chair will add volunteer Membership Coordinator to more proactively recruit and retain members.</p> <p>Improve communication to visitors and potential new members. Membership Chair to work with Ways and Means Committee to increase interest and participation in Circle Suppers and other social events.</p> <p>Develop plan to contact/follow up with visitors to become members.</p> <p>Solicit membership to regulars who are not members.</p> <p>Develop plan for routine follow up for both of the above.</p>				<p>The Membership Chair will work with the VP of Operations, Board and Minister to hire a part-time membership coordinator.</p>	
	<p>Assume base of 144, at start of FY 2005-2006, then increase over the remaining years to reach 275 by end of year five. 275 is the number approved by a congregational vote.</p> <p>Goal: 144 + 27 = 171</p>	<p>Goal: 171 + 26 = 197</p>	<p>Goal: 197 + 26 = 223</p>	<p>Goal: 223 + 26 = 249</p>	<p>Goal: 249 + 26 = 275</p>

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<p>Lifespan Religious Exploration and Adult Learning (including CRE, Adult Forum and Covenant Groups) Jan</p>	<p>Replace DRE, part-time, & provide salary and benefits in line w. UUA "fair compensation" guidelines for mid-size congregations.</p> <p>Budget for adult RE & develop adult RE program/curriculum.</p> <p>25 hours DRE. 85 children registered in the program. Adult Education budgeted and committee chair selected; committee selected, develop program and curriculum.</p> <p>\$3,800 CRE; \$700 adult religious programs; \$500 adult learning and adult forum</p>	<p>25 hours DRE. 102 children registered in the program.</p> <p>\$3,800 CRE; \$1,000 Adult RE.</p>	<p>30 hours DRE. 123 children registered in the program.</p> <p>Adult Forum Coordinator to expand adult forum to paid speakers.</p> <p>\$3,900 CRE; \$1000 Adult RE</p>	<p>30 hours DRE. 147 children registered in the program.</p> <p>20 hours Youth Coordinator or RE Asst. \$15,000. \$4,000 CRE; \$1,000 Adult RE</p>	<p>40 hours DRE. 176 children registered in the program.</p> <p>20 hours Youth Coordinator or RE Asst. \$15,500. \$4,000 CRE; \$1,000 Adult RE</p> <p>Church Administrator 40 hours</p> <p>Custodial/maintenance 10-15 hours</p>
<p>Office Administration (Staff and Admin Support) Jan</p>	<p>Add part-time volunteer Church/Office Administrator.</p> <p>DRE \$20,660.00; part time church administrator \$15,000; nursery and child care \$1,800.00.</p>	<p>Apply for Chalice Lighters grant for a part-time administrator 20 hours per week.</p> <p>\$2?,000.00 DRE salary</p>	<p>VP of Finance to add paid part-time office administrator to budget for 20 hours per week.</p> <p>\$2?,000.00 DRE salary</p>	<p>VP of Finance to increase part-time office administrator to budget for 30 hours per week.</p> <p>2?,000 DRE salary</p>	<p>VP of Finance to increase office administrator hours to budget for 40 hours per week (full time).</p> <p>VP of Finance to add paid custodian for 10 hours per week."</p> <p>\$3?,000 DRE salary</p>

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Accountable Financial Structure John Alcorn	<p>Board to develop budget in line with goals for the fiscal year, results of pledge canvass and recommendations of UUA consultant, and income and expenditure estimates determined to be achievable. Determine salaries and addition of staff based on pledges, fair compensation standards, cost of living adjustments and merit increases.</p> <p>Board of Directors too explore ways, with input from the UUA consultant, to acknowledge and publicize top contributors.</p>	<p>Continue with a budget in line with goals for the fiscal year, input from UUA Consultant. Continue to be more open and transparent regarding financial matters.</p>	<p>VP of Finance to prepare Program Budget instead of a Line Item Budget.</p>		
Social Action, Advocacy and Justice Jan	<p>Add Environmental Action Group as a sub group of the Social Action Committee. Continue to recruit good speakers to draw people in. Expand Social Action Committee to 10 members.</p> <p>Promote and plan a Social Action Sunday service in Fall 2005.</p>	<p>Plan and implement an interfaith outreach plan, to reach out to those in other liberal religions.</p>	<p>Goal: to have 25% of congregation members involved in social action project(s).</p>		<p>Develop strategic plans and/or subcommittees in the following areas: environmental action; Peace Circle; food bank; homeless and refugee action; political action; letter-writing and petition signing; freedom of religion.</p>
Internal Communication (board to congregation, congregation to board, congregational meetings, Coordinating Council meetings, committee meetings) Lynn Cowan	<p>Designated board member to prepare "Splinters from the Board" feature in the newsletter. President to publish Board meeting agendas one week prior to the Board meeting." Secretary to draft Board Meeting minutes within two weeks of the meeting and publish on the bulletin board, and web within one week of Board approval. Office Administrators to set up a telephone tree/postal mail list for those who elect to receive verbal or printed communications.</p> <p>VP of Finance to hold quarterly informational meetings for two-way communication between the congregation and Board. \$200 for mailings.</p>	<p>Board to use web-based (with non-electronic option) surveys to poll the congregation on proposed policies, directions, and initiatives. Board to continue communications on Policy Governance. \$400 for mailings and software.</p> <p>Committee Chairs to publish minutes of all committee meetings. Board to begin communicating how the Board's use of Policy Governance will affect communications.</p>	<p>Board will create formal policy for open Board, Committee, and Coordinating Council meetings. \$500 for mailings.</p>		

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External Communication and Outreach (including publicity) Rosy	<p>1. Publicity Chair and Membership Chair to expand community awareness of our Church to attract people who are seeking a liberal religious faith. Publicity Chair to continue ads in Yellow Pages, LA Times and Saddleback News. Publicity Chair to seek out additional no or low cost publicity in neighborhood flyers, colleges and other suitable media.</p> <p>2. Monthly advertising (newspaper, neighborhood flyers, colleges, table at events e.g.. O.C. Fair, Aids Walk, Harvest Festival, Gay Pride, Cancer Walk etc.)</p> <p>3. Event coordinators to ensure that Church event(s) are open to the public, e.g. Bingo night, Treasure Trove/garage sale, church bazaar, blood drive, collect items for homeless/hungry.</p> <p>4. Publicity Chair to coordinate with Social Action Committee and Ways and Means on event publicity since many activities serve both purposes e.g. car wash raises money and generates publicity.</p> <p>Publicity \$3500</p>	<p>Publicity Chair to investigate requirements to participate in Uncommon Denomination campaign.</p>		<p>Publicity Chair to investigate requirements to participate in and publicize becoming a Green Sanctuary</p>	

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<p>Communication, Combined (both Internal and External, including Web Site, Weekly Order of Service and Slip Sheet, Announcements) Lynn, Rosy</p>	<p>Seek new volunteer for office/administrative support.</p> <p>Webmaster to work with Membership Chair to continue enhancements to website targeted to newcomers/visitors.</p> <p>Office administrators to transform weekly bulletin/order of service, slip sheets and monthly newsletter so that they not only provide updated activities and committee news, but also reflect the exciting opportunities of this community, using cutting-edge graphics, desktop publishing resources, and design elements.</p> <p>Office administrators with input from the VP of Oeprations and committee chairs to provide clear descriptions of the groups available within the church and how to become engaged at various levels of involvement.</p> <p>With assistance and coordination from publicity Chair, advertise congregational events broadly and with significant advance notice.</p> <p>Continue the practice of quarterly congregational informational meetings, with attention to those people attending each service that UUCSC offers.</p> <p>. Improve the social hour for the purpose of encouraging greater involvement, with attention to the food and drink available, as well as formal and informal information. Consider adopting a "Tabling" culture, with information on pertinent activities made available on tables for all to browse."</p> <p>Involves miscellaneous costs of paper and supplies, plus postage. May require budgeting for purchase of desktop publishing software.</p>	<p>Webmaster to investigate what is involved in podcasting Rev. John's sermons.</p>			

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Ways and Means Fundraising (including Yearly Service Auctions) Rosy	VP of Finance, in consultation with Ways and Means Chair, to establish goal for each fiscal year. Set goals for Ways and Means fundraising, separate from other fundraisers.	Ways and Means Committee to work with outside consultant to explore additional fund raising opportunities.			
Fundraising, Capital Campaign	Capital Campaign Chair to work with consultant, consultant recommendations and Capital Campaign Committee to develop strategy for fundraising. Open separate investment or checking account to receive capital campaign funds. \$9,000 UUA consultant	Capital Campaign Chair to execute three-year Capital Campaign.	Capital Campaign Chair collects donations for year two of Capital Campaign.	Capital Campaign Chair collects donations for year three of Capital Campaign.	Begin planning second capital campaign.

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Information Technology and Computer Support Jan	<p>Current and former Treasurer to convert Membership Plus database to Power Church Plus on Treasurer's PC.</p> <p>Treasurer to populate PowerChurch database with records recommended by the Capital Campaign consultant and auditor.</p> <p>Ensure that Treasurer backs up all data at least weekly (provide software and/or equipment/supplies to do so). Extend use of database to Membership Chair to improve membership follow-up and tracking.</p> <p>\$4,000 miscellaneous office equipment & maintenance; \$1,000 software; \$500 for supplies. Volunteer IT expert.</p>	<p>VP of Operations to recruit a volunteer Technology Coordinator.</p> <p>Technology Coordinator to purchase a server with wireless access for the Minister, DRE, Treasurer, and a PC in a secure office at UUCSC for committee chairs.</p> <p>Technology Coordinator to train those with access to the database in uploading and downloading data.</p> <p>Board to create and staff a Computer Advisory Committee.</p> <p>The Treasurer to upgrade PowerChurch software.</p> <p>Upgrade PowerChurch software. \$5,000 for hardware and software. \$1,000 to create a secure computer room. \$2,400 for helpdesk contract. \$300 for PowerChurch upgrade.</p>	<p>VP of Finance to budget for and Technology Coordinator to provide secure web-based access to PowerChurch.</p> <p>Technology Coordinator to upgrade PowerChurch software. \$1,000 for ISP contract for web-based access via DSL.</p> <p>\$300 for Power Church upgrade.</p> <p>The Board will contract with a Help Desk service to provide computer support.</p>	<p>Technology Coordinator to set up three networked computers for minister, DRE, and office administrator.</p> <p>Technology Coordinator to upgrade server hardware and operating system. Upgrade PowerChurch software.</p> <p>\$3,000 for hardware and operating system upgrade. \$300 for PowerChurch upgrade.</p>	

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Worship (Sunday Services, Music and Choir) Janet, John Millspaugh, Connie	Worship Committee to research musician stipends and make recommendation to VP of Finance. Continue with meaningful services led by dedicated minister. On those Sundays when our minister is away, Worship Committee will continue to fill the pulpit with visiting ministers and lay speakers.	Increase salary/stipend for pianists Worship Committee to consider feasibility of volunteer pianists vs. paid pianists and pursue talent within our own membership. Add stipend/salary for choir director.			
Monitoring and Assessing the Five-Year Plan Connie, John Alcorn, John Millspaugh	Comprehensive Planning Committee member to chair periodic monthly meetings of committee chairs (or bimonthly or quarterly as needs dictate) to coordinate and communicate activities to ensure activities are in line with/implementation of overall plan, mission and goals.				Comprehensive Planning Committee member to chair periodic monthly meetings of committee chairs (or bimonthly or quarterly as needs dictate) to coordinate and communicate activities to ensure activities are in line with/implementation of overall plan, mission and goals.
INCOME ASSUMPTIONS					
Operating Income, Pledges	(Assume roughly a mean of \$1,900 per member per year)				
Operating Income, Rentals	Assume \$1,100 per month				
Operating Income, Ways and Means Activities	Assume \$ 36,000.00 from Service Auctions (\$18,000 x 2); assume \$4,300.00 in rebates from spring travel/trip based on 17-20 travelers				

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Social Activities – picnics, circle suppers, family night, games, etc.					
Scrip and plate offerings (non-pledge income)					
Bequests	<p>Work with consultant to develop a plan for handling, and encouraging, bequests.</p> <p>Board President to explore option of displaying a plaque in a prominent place in the church to acknowledge bequests.</p>				
Budget/Finance	See attached budget for 2005-2006, Exhibit I.				