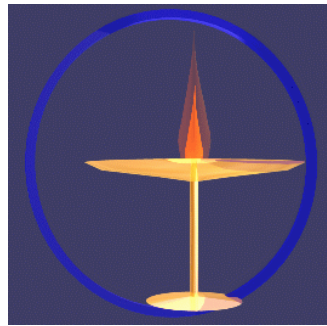


Comprehensive Five-Year Plan



Unitarian Universalist Church
of South County
Mission Viejo, California

September 1, 2005

**Unitarian
Universalist
Church of
South County**

**25801 Obrero
Drive
Mission Viejo,
CA 92691**

**Rev. John
Millspaugh,
Minister**

Introduction

Every organization must have a shared vision of where it is going in order to accomplish its goal. It must have a plan to get there in order to achieve its goals.

The Comprehensive Planning Committee has worked hard over the past several months on a plan to achieve goals for the next five years, using input from the cottage meetings in order to gain member opinions.

We learned how tough it is to put a plan like this together. We also learned how invigorating and even fun it can be to look into the future and dream about possibilities.

This comprehensive plan is designed to be a living document, which means it is not a final product, and can be updated as needed. A more detailed version, including a year-by-year description, is available in grid form. We will continually evaluate this plan and revise it annually to match our vision and reality (for details see page 25, Monitoring and Assessing the Five-Year Plan, and the assessment tool in the Appendix).

This plan is a reflection of our congregation's wisdom and vision, and we hope it will serve as a guide to tasks and rewards that lie ahead for our growing religious community.

Are you ready to dream?

Every great change begins with a dream, but it takes cooperation and commitment to make our dreams a reality. If you'd like to see your hopes for this religious community fulfilled, you'll want to turn the page.

Sincerely,

Your Comprehensive Planning Committee
John Alcorn, Janet Lusk, Jan Meslin, Rosy Pacilli, Connie Pursell

"The moment of enlightenment is when a person's dreams of possibilities become images of probabilities." – Vic Braden

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Chapter I

History

In November 1995, two Unitarian Universalist churches in the Mission Viejo area decided to combine resources and congregations to form what is now known as the Unitarian Universalist Church of South County (UUCSC). One of the predecessor churches, All Souls Unitarian Universalist Church (a young congregation formed in August of 1990), had just leased the present facility in Mission Viejo. The Aliso Creek Church (a long-time Mission Viejo congregation since 1975) was still meeting in neighborhood schools, and their Minister, Rev. Robert Jordan Ross, had announced his intention to retire.

Shortly after St. Patrick's day in 1995, the two congregations started the process of uniting the two congregations. Committees were formed, and staffed by both congregations, and thus a new church was formed with Rev. Ross as the minister. A search committee was formed, a church packet put together, and both the UUA and Pacific Southwest District informed of the intended search for a settled full time minister. Rev. Ross was designated Minister Emeritus upon his retirement and is still affiliated with our congregation in that capacity today.

Rev. Suzanne Black was called to the full-time ministry of UUCSC in 1997 and served for three years.

Rev. Anne Hines served as interim minister in 2001-2002. Under her guidance, the congregation conducted some self-examination to better understand where we had been and where we wanted to go. As an interim minister, Rev. Hines' contract was for only a single year and during that time, we conducted an intensive search for a settled minister.

The search committee selected candidate Rev. John Millspaugh who visited us that spring to present two sermons during his candidating period. The search was concluded in the spring of 2002 with the decision to call John Millspaugh as our settled minister. Rev. Millspaugh joined us as our full-time, permanent minister in September, 2002, immediately following his ordination.

"There is no life that does not contribute to history." – Dorothy West

Chapter II

**Mission
Statement**

To encourage spiritual growth through free religious thought; to foster an atmosphere of acceptance, love and respect; to support commitment to service in the wider world.

Chapter III

Vision

A Joint Open Letter from the Comprehensive Planning Committee and Your Board of Directors

Sunday June 27, 2010

Dear Fellow Church Members:

It has been five years since the Comprehensive Planning Committee, then chaired by John Alcorn, started its hard work on a five-year plan for this congregation. Around that time we also started working with UUA consultant Larry Wheeler to launch our first capital campaign. The Capital Campaign Committee, chaired by Bob Meyer, worked diligently to raise money so we could achieve our dream of having our first permanent home.

We've reached many of our goals since we first became a mid-sized church. You have only to look around to see proof of that. Our church has a new name. We have an exciting new location. We've successfully taken on a mortgage. We've more than doubled our membership. We've increased community awareness and have become a significant presence in South Orange County.

Our sanctuary is an aesthetic marvel thanks to our Aesthetics Committee and a member who is an interior designer. A magnificent tapestry now hangs next to our old banner, representing the new and the old. We have a state-of-the art sound system and two entrances, both wheelchair-accessible. The raised pulpit provides everyone with a good view. The stained glass window of a flaming chalice, above the choir loft, is the focal point. The beautiful golds, yellows, reds and blues catch the late morning light during our Sunday worship service and bathe the sanctuary in a mood of awe and serenity. Additionally the grand piano, donated by a new member in 2008, provides wonderful accompaniment for our Sunday worship services and has enabled us to offer concerts as fund-raisers.

Our new social hall and kitchen. Our new nursery and children's play area. Our library and reading room. Our separate wing of classrooms for adult and children's religious exploration, with a chapel for separate youth services. Our children's play area and nursery. Our spacious parking lot. Our memorial wall acknowledging bequests and angels over the past several years. Our small auditorium where adult forums attract as many as 75 people, many of them non-member visitors, each month. All this speaks to visions and goals fulfilled.

In spite of our growth, we continue to receive feedback that this church is a warm and welcoming place that still manages to retain

the feeling of family that was the hallmark of our early years.

And none of this could have been achieved without each and every one of you, each giving in your own unique way to bring us to this point. Each of you kept the vision strong in your mind's eye and each of you deserves to share in the credit for our success.

We've grown in our church governance skills. You take an active interest in the affairs of this church, as evidenced by the many and frequent visitors to our monthly board meetings.

Truly we live up to our new name. How apt. We are proud to walk with you as you continue down your own unique spiritual path. We are proud that our path and yours have converged to bring us to this time, this place.

In peace, thanksgiving and appreciation,

The Current Comprehensive Planning Committee
and Your Board of Directors

"Cherish your visions and your dreams, as they are the children of your soul, the blueprints of your ultimate achievements." – Napoleon Hill

**"Everything in life that we really accept undergoes a change."
– Katherine Mansfield**

Goals: Ministry

In the spring of 2005, the Comprehensive Planning Committee began planning for Ministry over the next five years. We plan to continue paying a full-time as we are committed to always having a dedicated minister.

The Committee considered the possibility that the current minister, the Reverend John Millspaugh, our minister since 2002, could possibly leave and move on to other challenges. We hope this does not happen and that the membership growth of the church, the exciting addition of new programs and activities, the quest for a permanent home and all that search entails, will entice him to stay.

In any case, we are firmly committed to providing yearly salary increases based on UUA "fair compensation" guidelines for a mid-sized church, church member feedback on performance, and Board recommendations. Reverend John is one of our most important assets. We feel that much of the member satisfaction and growth we enjoy at present is a direct result of his inspiring sermons and capable leadership.

In fiscal year 2006-2007, the church will offer Reverend John a much-earned four-month sabbatical. During his absence, we expect that the Worship Committee will fill the pulpit with inspiring visiting ministers and lay speakers with thought-provoking messages in line with our seven UU principles, as they do in July and August.

In the third year of the plan we will:

1. Conduct a new minister search as/if needed (should Rev. John move on).
2. The church hopes to fill a Ministerial Internship position during the third year of the five-year plan (fiscal year 2007-2008). Salary will be based on UUA fair compensation salary guidelines. We expect an intern to take on some of the extra work that Reverend John currently does alone, and to bring innovative ideas and support to the church. Having an additional individual to shoulder some of the responsibility is particularly important during a period of growth.
3. 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. We support training of Caring Committee members in order to achieve this goal and hope that such training can be provided in the third year of the plan.

In the fourth year of the plan, we will have a new minister in place, if needed.

The congregation hopes to support another intern, and take on another recruitment to that end, in fiscal year 2009-2010, the fifth year of the plan.

"The true character of ministry is a servant's heart" – Harold Warner

**Goals:
Governance**

The progress from where we are to where we want to be in 2010 is likely to be slow and gradual, but our hope is to establish a system of governance that allows the church to run smoothly with coordinated systems of communication between all key parties – Board of Directors, committees and members.

As we develop further as a mid-sized church, we envision a coherent structure for governance and committees in line with the UUCSC mission & the seven UU principles. The high points of the first year plan include the following:

1. The VP of Operations will staff committees appropriately based on guidelines from the Board.
2. The VP of Operations will lead monthly Coordinating Council meetings to assure all activities & committees align with our mission and UU principles.
3. The VP of Operations will receive suggestions and new ideas from the congregation for activities and forward to the appropriate committee.
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.
5. 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.

In the third year of the plan, the board will work with a UUA Consultant to select, and begin to implement, an appropriate governance structure. By the fifth year of the plan, the new governance structure should be fully implemented.

"A community is like a ship; everyone ought to be prepared to take the helm." – Henrik Ibsen

Goals: Facility, Existing

While we feel our major energies should be on the search for a new site, we will still occupy our current space for a while longer. Therefore, the following goals are envisioned for the current space:

1. Continue with rental, negotiating best rate with landlord.
2. Continue with a volunteer janitorial coordinator.
3. Continue looking for suitable renters for our existing space (e.g., AA, day care, Sierra Club, other organizations, etc.) as a means of enhancing revenue.
4. The Aesthetics committee will work with the Board of Directors to assess renters a fee for cleaning as part of their rental agreement.
5. Continue work of the current Aesthetics Committee to maintain a dignified, neat and pleasing "look" to the best extent we can without major expenditures of funds.
6. Continue the arrangement with local artists to continue to display their works in our social hall on a rotating basis.
7. The New Facility Chair will complete the committee charter, including assessment of minimum space needs for current congregation activities.

During both the first two years of the plan, the New Facility Chair will explore and consider alternate interim, lower cost, space rental to reduce rental costs. This will allow us to better devote income to a new facility. Possibilities include eliminating or switching to less square footage in our current facility, or sharing space with another congregation.

**"We require from buildings two kinds of goodness: first, the doing their practical duty well: then that they be graceful and pleasing in doing it."
John Ruskin**

Goals: New Facility and Grounds

The long range goal is to find a suitable site/property by fiscal year 2008-2009. To that end, specific goals and steps are:

1. Work with UUA consultant to plan and start a capital campaign.
2. Actively pursue search for another site, in conjunction with advice and input from New Facility 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.
3. The New Facility Chair will develop a comprehensive "pro forma" checklist of desired features for assessing properties as they become available. The New Facility Chair will use input from New Facility Committee, data compiled from cottage meetings in 2003 and the "old" five year plan to get started on this.
4. 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.

**"We shape our buildings; thereafter they shape us."
Winston Churchill**

"A vision is not just a picture of what could be; it is an appeal to our better selves, a call to become something more." – Rosabeth Moss Kanter

**Goals:
Lifespan
Religious
Exploration
and Adult
Learning
(including
CRE, Adult
Forum and
Covenant
Groups)**

Learning at all levels and ages is a significant aspect of spiritual growth. We hope that offering a variety of programs for children as well as adults will provide balance and offer a learning path as we continue on our individual spiritual journeys. It appears many members of the congregation are committed to ongoing learning, as evidenced by the large number of participants in our recent Covenant Groups and attendance at our Adult Forums.

The key points of the plan for this category include the following:

1. To replace the part-time DRE position and provide salary and benefits in line with UUA "fair compensation" guidelines for a mid-sized congregation. Due to previous Directors moving away from the geographical area, we have had continued turnover in the position of DRE. Therefore, this first goal is key.
2. By the second year of the plan, increase the hours of the DRE to 25 hours per week and increase salary accordingly.
3. By the third year of the plan, we will begin to expand the Adult Forum to paid speakers.
4. In the fourth year of the plan, add a Youth Coordinator or RE Assistant and budget for 20 hours per week for this position with an appropriate salary based on UUA guidelines.
5. In the fifth year of the plan, the goal for staffing is:
 - a. Full time DRE.
 - b. Youth Coordinator or RE Assistant at 20 hours per week.

"You can teach a student a lesson for a day; but if you can teach him to learn by creating curiosity, he will continue the learning process as long as he lives." – Clay P. Bedford

Goals: Office Administration

We have grown to a size where additional volunteer office help is needed. As we grow, additional professional staffing will be needed.

Administrative help shifts professional religious leaders' time from running photocopies, collating mailings, negotiating with renters, watering plants, ordering pamphlets, filing, tidying up, and so on, to ministerial, pastoral, educational, community outreach and social action activities.

Administrative help will also reduce the administrative demand on UUCSC volunteers, freeing their gifts, talents, and energies for a greater variety of purposes.

We have set a goal of adding the following:

1. In the first year of the plan, add a part-time volunteer Church/Office Administrator.
2. In the second year of the plan, apply for a Chalice Lighters grant for a part-time Office Administrator, 20 hours per week.
3. In the third year of the plan, the VP of Finance will add a paid part-time Office Administrator, budgeted at 20 hours per week.
4. In the fourth year of the plan, the VP of Finance will budget to increase the part-time Office Administrator hours to 30 hours per week.
5. By the fifth year of the plan, the VP of Finance will increase staffing & budget to allow for:
 - a. An Office Administrator for 40 hours per week (full time).
 - b. A paid custodian for 10 hours per week.

**"Treat employees like partners, and they act like partners."
Fred Allen**

Goals: Accountable Financial Structure

For the upcoming fiscal year (2005-2006), the Board of Directors has developed a budget with the input of a UUA consultant. This budget is in line with our goals for the fiscal year, results of pledge canvass and expenditure estimates determined to be achievable. feedback from the congregation. Salaries and addition of staff are based on pledges, fair compensation standards, cost of living adjustments and merit increases.

In subsequent fiscal years, our goals are:

1. To make the transition, with the guidance of the UUA consultant, to more openness and transparency of financial matters.
2. Gradually, we wish to create a culture in which we are able to talk more freely about pledges, church expenses, salaries and all related financial matters, without compromising any member's privacy.
3. To explore ways, with the Board of Directors and the consultant, to acknowledge and publicize top contributors.
4. By the third year of the plan, the VP of Finance will prepare a Program Budget instead of a Line Item Budget.

"If we want unity, we must all be unifiers. If we want accountability, each of us must be accountable for all we do." – Christine Gregoire

Goals: Social Action, Advocacy and Justice

The UUA has a long history of social action that continues to this day. In keeping with this tradition, our own Social Action Committee continues to seek ways in which church members can become more involved and to give the church a voice in greater Orange County in promoting right relationships and ethical social policies. To those ends, the Social Action Committee has these goals for fiscal year 2005-2006:

1. To add an Environmental Action Group as a sub group of the Social Action Committee.
2. To continue to recruit excellent speakers to draw guests and visitors.
3. To expand the Social Action Committee to ten (10) members.
4. To promote and plan a Social Action Sunday service in the Fall of 2005.

In fiscal year 2006-2007, the Social Action Committee will plan and implement an interfaith outreach strategy, to reach out to those in other liberal religions.

By the end of fiscal year 2007-2008, the Social Action Committee has set a goal to have 25% of congregation members involved in social action project(s).

**"Injustice anywhere is a threat to justice everywhere."
Martin Luther King, Jr.**

**Goals:
External
Communication
and Outreach**

While we feel we do many things well, we are a reticent when it comes to evangelizing about the attractive aspects of our liberal faith. We can do much more in this area to attract potential new members. To that end, the Comprehensive Planning Committee has identified these areas of focus:

1. Broaden the awareness of our Church to attract people who are seeking a liberal religious faith. We envision this as a combined effort of the Publicity Chair, the Membership Coordinator and the Membership Chair and foresee them developing creative ideas to get the word out.
2. Monthly advertising (newspaper, neighborhood flyers, colleges, tables at events e.g. O.C. Fair, Aids Walk, Harvest Festival, Gay Pride, Cancer Walk, etc.)
3. Church event(s) open to public, e.g. Bingo night, Treasure Trove sale, church bazaar, blood drive, collect items for homeless/hungry.
4. Coordination with the Ways and Means Committee as well since many activities serve both purposes, e.g. a car wash raises money and provides publicity and visibility.
5. Publicity Committee to regularly submit articles to local newspapers highlighting the works and endeavors of our church.

“What is required is not a lot words, but effectual ones.” – Seneca

**Goals:
Communication,
Combined (both
Internal and
External)**

In this area too, we feel we can improve in letting members, visitors and the wider community know about the exciting events and happenings here at UUCSC. We have a lot going on at almost any given time, and those of us involved in one or two areas often don't know all the various activities going on in other venues. To strengthen and build in this area, the Comprehensive Planning Committee recommends:

1. The Publicity Chair and the Membership Chair will expand community awareness of our Church to attract people who are seeking a liberal religious faith.
2. The Publicity Chair will continue ads in Yellow Pages, LA Times and Saddleback News, including advertising of events we participate in (newspaper, neighborhood flyers, colleges, table at events e.g., O.C. Fair, Aids Walk, Harvest Festival, Gay Pride, Cancer Walk etc.)
3. The Publicity Chair will seek out additional no or low cost publicity in neighborhood flyers, colleges and other suitable media.
4. Event coordinators should 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.
5. The Publicity Chair should coordinate with the Social Action Committee and Ways and Means on event publicity since many activities serve both purposes, e.g. a car wash raises money and generates publicity.

"Communication leads to community, that is, to understanding, intimacy and mutual valuing." – Rollo May

Goals: Ways and Means Fundraising

The Ways and Means Committee has done an outstanding job of fundraising, but as we grow we hope to do even better in this regard.

Year One Goals:

1. The VP of Finance, in consultation with the Ways and Means Chair, will establish a goal for each fiscal year separate from other fundraisers..
2. Ways and Means will develop plans to achieve goals and plan activities to raise amount specified e.g. Bazaar, service auctions, Treasure Trove sale, Bingo Night, Casino Night, etc.

Goals, Years Two through Five:

The Ways and Means Committee will work with the outside consultant, the Board and the Comprehensive Planning Committee to explore additional fundraising opportunities.

**"Giving opens the way for receiving."
Florence Scovel Shinn**

Goals: Fundraising, Capital Campaign

Over the period of 2007-2009, we will kick off our first capital campaign. This is an exciting, and somewhat scary, venture but our outside consultant assures us that substantial funds can be raised based on his experience working with other churches of our size. Our goals are:

1. To work with the consultant, consultant recommendations and the Capital Campaign Committee to develop strategies for fundraising.
2. Open a separate investment or checking account to receive capital campaign funds.
3. Begin planning a second capital campaign by the end of the fifth year of the plan.

**"Money isn't everything -- as long as you have enough of it."
– Anonymous~**

Goals: Worship (Sunday Services)

In fiscal year 2004-2005, the Worship Committee did an outstanding job of bringing us worship programs led by our own minister as well as paid guest speakers.

Our goal is to continue with meaningful services led by our own dedicated minister. On those Sundays, and in the summers, when our minister is away, we trust that the Worship Committee will continue to fill the pulpit with inspiring visiting ministers and lay speakers with thought-provoking messages in line with our seven UU principles.

We seek to slowly transform UUCSC's worship experience so that it is even more welcoming, vibrant, challenging, and inspiring. We seek to reflect the diversity (age, culture, ability, sexual orientation) of our surrounding community, and adopt a worship format that is welcoming to a greater variety of people. In particular, we intend to include more contemporary music and stylings. Knowing that music is key to newcomer retention, we seek to move toward a higher standard in our music program, including greater quality and variety in our congregational singing and instrumental music.

Other specific goals are:

1. In the first year of the plan, the Worship Committee will research musician stipends and make a recommendation to VP of Finance.
2. In the second year of the plan, the worship Committee will explore the feasibility of:
 - a. Continuing and/or Increasing the salary/stipend for pianists and possibly other musicians, as well as the feasibility of paid musicians vs. volunteer musicians, drawing from the talent pool within our own membership.
 - b. Adding a stipend/salary for Choir Director.

"Man always worships something; always he sees the Infinite shadowed forth in something finite; and indeed can and must so see it in any finite thing, once tempt him well to fix his eyes thereon."

Thomas Carlyle

**Goals:
Monitoring and
Assessing the
Five-Year Plan**

The Comprehensive Planning Committee (CPC) plans to keep the five-year plan alive and well, and very public, so that the congregation can follow the progress towards our goals.

Each quarter, the Comprehensive Planning Committee will meet to assess progress and/or impediments based on what the plan calls for.

Each fiscal year, the CPC will submit written proposals to the Board of Directors for annual revisions to the plan, sometimes deleting or adding items, and sometimes scaling back or expanding, goals from those stated in the original plan.

The CPC has developed a format for quarterly and yearly assessments. Please refer to a copy of this format in the Appendix of this document.

"Capital as such is not evil; it is its wrong use that is evil. Capital in some form or other will always be needed." Mohandas K. Gandhi

<p>Chapter V</p> <p>Implementation Plan</p>	<p>Implementing a comprehensive strategic plan, and staying on track toward goals, takes the cooperation and coordination of many people. In the case of our church, this coordination will involve the Board of Directors, the Comprehensive Planning Committee, the UUA consultant, Committee Chairs and members.</p> <p>The Comprehensive Planning Committee and the Board of Directors are committed to:</p> <ol style="list-style-type: none">1. Working cooperatively.2. Putting shared purpose before personality in their joint efforts toward our mutual goals.3. Listening actively to one another's ideas as we implement the plan. <p>If we focus on the exciting goals we have set, and envision them as if they were already achieved, we cannot help but succeed.</p> <p>"Setting a goal is not the main thing. It is deciding how you will go about achieving it and staying with that plan." – Tom Landry</p>
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<p>Chapter VI</p> <p>Finance and Budget</p>	<p>The prior section on Accountable Financial Structure (page 14) outlines the general philosophy of how we wish to proceed.</p> <p>The specifics of the budget for fiscal year 2005-2006 can be found in the Appendix.</p> <p>"Capital as such is not evil; it is its wrong use that is evil. Capital in some form or other will always be needed." Mohandas K. Gandhi</p>
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Appendix