

# Summary of Strategic Planning Roundtables

## June 2021

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# Background

- During May 2021, the strategic planning committee conducted a series of 9 roundtables, addressing the long-term future of FPL. The roundtables were one workstream in a much broader strategic planning project
- Each roundtable was facilitated by a member of the strategic planning committee and notes were taken by another member of the committee
  - A very simple topical guide was used to facilitate the discussion, but the format was structured to encourage open-ended consideration of broad and pressing issues
- In total, 41 parishioners participated in these 90-minute sessions
  - There were many past and present committee chairs, members of the Parish Committee, Deacons, leaders of RE, and others deeply involved and committed to FPL, along with others with lower levels of involvement
    - The discussions were open, well informed and in depth
  - Relatively poorly represented were parents of families with children of school age or younger

# This Document

- The following is a summary of the most commonly voiced thoughts (“Fundamental Observations”). Less commonly voiced sentiments and supporting quotes are also provided
- In addition to answering the strategic questions that were the primary focus of the sessions, there were a number of useful comments made on other topics; those are included just prior to the appendix
- The appendix (a separate file) includes full notes from the sessions
- This document will be provided to the Search Committee as input
- This report, along with a number of other workstreams (some still to be completed) will form the basis for strategic decisions that FPL will look to make over the coming years

# Executive Summary

**Our Long-Term Future.** Given trends in religious participation both nationally and locally, the aging of Lincoln's population and FPL's membership, and the steady decline in FPL pledge participation<sup>1</sup>, there is widespread concern that in a decade or so we may lose critical mass (100 or fewer members, down from our peak of 300) if we do not do something to resist the tides. During May 2021, the strategic planning committee conducted a series of 9 roundtables (41 total participants), addressing questions concerning the long-term future of FPL. The roundtables were one workstream in a much broader strategic planning project<sup>2</sup>.

**Investing in Growth.** Participants were asked: *Are we willing to invest more in order to attempt to reverse the membership trend – with our time, our financial contributions or a draw above 4 percent of our endowment?* Trend data on pledge counts and amounts over time were shared.

- There was broad support for making smart, targeted, strategic investments in growth, including an endowment draw over 4 percent if necessary. Strategic investments of volunteer time will also be needed. This will likely require broadening the volunteer base, as many believe that the current core group of volunteers may not have additional capacity.

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1. It must be noted happily that the 2021-2 stewardship campaign resulted in an increase in both pledging units and overall donations.
2. These questions were chosen due to their potential relevance to the search for a new minister.

## Executive Summary (continued)

**Areas of Focus.** Participants were asked: *Which programmatic components do we most need, to ensure FPL remains vibrant and financially strong for another generation? Which elements should be particularly strong in our new settled minister?*

- There was strong concurrence that community outreach will be key to our holding and growing our Parishioner base. There was overwhelming agreement that the new settled minister will be the most important single factor in our long-term success, and that the minister should have more emphasis on community engagement than has been true in the past. In addition, engaging sermons and Sunday services were viewed as foundational prerequisites for the minister.
- Many participants expressed that the minister should inspire and support the areas of passion among the congregation. This was viewed as more important than choosing a particular programmatic area, social cause, etc. as a particular focus for the church.

**Demographic Focus.** Participants were asked *which of five demographic groups should we actively target: elderly, recently retired, empty nesters, parents with high school children, parents with young children?*

- The most common theme was we should target two groups: recently retired and empty nesters / 50+ who may have time, interest, and energy to devote to the church. Although participants recognized the challenges in attracting families with young children, there was strong agreement that this group is important for the church's future.

# Discussion Topic One: Investing in Growth

Are we willing to invest more in order to attempt to reverse the membership trend?

- With our volunteer time?
- With our financial contributions?
- With draws above 4%<sup>1</sup> of our endowment?

1. Draws above 4% for an extended period of time are generally considered unsustainable

# Investing in Growth

- There was both enthusiasm, and unease, about investing in growth, often from the same participant
- Many made the point that simply throwing money at the problem will not work. “If what we do is compelling, money and participation will follow” was a common sentiment.
- Some felt that we should be willing to draw more than 4% -- if we do it strategically. “We could stay at 4% and have an endowment but no church”
- Two or three participants posed the following: we need a controlled experiment, with goals and a time limit (e.g., five years), and dollar limit, to see if we can grow. This experiment would be a good place to invest more than the 4% cap on the use of our endowment funds. But we have to be clear and resolute, if it does not work, we move on to some form of a Plan B. “We need to realize investment involves risk.”
- Some observed that the current member base may be tapped out in terms of the volunteer time that they can provide – at least among the core membership group – additional investment from this group may not be possible
- Beyond that, there were many suggested programs and actions, but there was a key tension between two underlying themes regarding whether we should invest in growth:
  - “Staying small is the wrong statement for these times. We need to be outward facing, engaging and inclusive. Lincoln is too small. We need to be a regional leader.”
  - Versus, “What is our differentiator, with so many Unitarian, UCC and other organizations around?” Several answered this question by suggesting consolidation in one form or another with other churches in the area, rather than attempting to hold our own, let alone grow to our former numbers of around 300.
- One participant observed the new minister must have the maturity to try things where some of them simply will not work. The new minister must move on and not get discouraged.

## Investing in Growth (continued)

- The world has changed, and we need to be open to trying new things, even if they cost money. Zoom / electronic media is one example
- There were numerous comments that we should continue to invest in welcoming and providing a spiritual home for young families, even if we do not expect a return on the investment (i.e., large numbers of new engaged families)

## Discussion Two: Areas of Focus

Which programmatic components do we most need, to ensure FPL remains vibrant and financially strong for another generation?

Which elements should be particularly strong in our new settled minister?



# Potential Areas of Focus

## Settled Minister as a Primary Focus

- Overwhelming agreement that the new settled minister will be the most important single factor in our long-term success
- The sermon, and the Sunday service, is the center of it all. This is what brings people to the church. This is what separates a church from other community organizations
- Rev. Jenny (frequently referred to as “the healer”) is viewed as being instrumental in the tremendous progress made by the congregation during the last three years. This is evidence of how important the right minister is
- There was also strong agreement that the new minister “cannot do it all,” and must work as a team with staff, committees, volunteers and the Parish as whole

## Secondary observations & supporting quotes

- The new minister is key to arresting declining membership
  - Some noted that giving the new minister this as the sole/primary goal may be counterproductive—we need a vibrant community and new members will come
  - However, the minister cannot do it all—we need to manage our expectations
- A stronger focus on the external community than in the past would be good
- Strong agreement that the new minister must be charismatic, with great emotional and spiritual maturity
- “Don’t just check the boxes—find someone you resonate with.”
- “We need a fit with the congregation—someone who comforts our souls.”
- We need someone with “enthusiasm for the strengths we have.”

# Potential Areas of Focus

## Social and Political Outreach as a Primary Focus

- There was no discernable appetite for a substantial *increase* in social/political activism. On the other hand, there was *comfort* with the current level, maybe with a small plus or minus off of that level, but not any drastic changes.
- There was a repeated concern, in various forms, that picking one or a small number of specific causes risks being “not my cause” for too many parishioners—which would lead to a backlash.
  - Sub-groups could pursue various types of activism but endorsement by FPL or from the pulpit could be counter-productive
- Racial justice and environmental activism received more favorable comments than not, and more than other activist concerns.
- Participants felt that the new minister will need to be careful to strike a balance between promoting activism overall, which most support, and promoting specific causes.

## Secondary observations & supporting quotes

- “We are better when we focus on generosity. Do good and be happy about it. Don’t do anything too drastic.”
- “Social and political outreach is the second most important thing we should pursue, after a charismatic new minister.”
- “We need to be careful about selecting what causes to pursue, versus causes that are ‘not my issue’ for too many people”
- “An emphasis on activism is problematic, because not everyone will agree. Let activism be handled by groups within the church.”
- “The minister can be permissive of social causes, without going too far as to cause a backlash.”
- FPL Green efforts are held in generally high regard, as are efforts regarding racial justice, but the latter was mentioned less often

# Potential Areas of Focus

## Religious Education as a Primary Focus

- RE is a function that inspired differing views, best articulated as follows:
  - “A church without RE is a non-starter.”
  - Versus, “I am not sure that RE is fundamental going forward. Let’s hold on for 5-6 years and see if the demographics improve.”
- The skill, energy and dedication of Margit was uniformly admired
  - But the continuing small size of the program was a concern to some: “We have an enthusiastic Director, but very few kids.”

## Secondary observations & supporting quotes

- OWL has been very successful
- We need some mechanism to keep teens involved after OWL
- We need to consider doing something for school-aged children on early release Wednesdays, when they congregate on the mall
  - Some presumed those teens at the mall could be the target, while others wanted to target the early release teens who did not go to the mall
- “We may need to join with some other, larger, parish to have a viable program. I have seen this with Boy Scout troops coming from a larger area.”

# Potential Areas of Focus

## Music as a Primary Focus

- Though it was teed up in some conversations as a possible primary area of focus, there was no sentiment that FPL should focus its energy or resources on music
- Ian was widely praised, with the thought being that we could more aggressively leverage his talents and the outside talent he brings to bear, especially regarding special events.
  - Music may be one of our best ways to get non-parishioners involved
  - But we need to promote FPL more aggressively at these events

## Secondary observations & supporting quotes

- Regarding Sunday services, many are satisfied, but there are a significant number of participants who would like to see more variety in the Sunday service music

# Potential Areas of Focus

## Community Outreach / Engagement as a Primary Focus

- There was strong concurrence that community outreach will be key to our holding and growing our Parishioner base
- The most important immediate step is to recruit a charismatic, community involved new minister, with more emphasis on community engagement than has been true in the past
- Word of mouth to ‘spread the message’ was viewed by many as the best way to get new people interested in FPL
- Beyond that, there was a recognition of the many things we do: Touch of Christmas Fair, Live in Lincoln Center, Food for Thought and more
  - But several challenged if we do enough to leverage FPL at these events: One person described Touch of Christmas as “just another rummage sale,” with little done to encourage outsiders to explore more about FPL
- There were many comments on using more events with food provided to encourage outsiders, especially teens, to interact with FPL

## Secondary observations & supporting quotes

- Many offered, “We need a welcome wagon/greeting committee for new Lincoln residents.”
  - Revered Styron was cited multiple times as someone who knocked on the door of every new resident, as did ministers in that era from other Lincoln churches
- “The FPL kitchen is an asset—we should use it for more dinners to attract outsiders.”
- “While having speakers is great, just an affordable (\$10) dinner once or twice a month, with no obligations, would be well received by stressed out Lincolnites”
- We need to interact with other groups in town, like the COA (Council on Aging). There is some parishioner interaction, but there could be minister interaction in the future.
- A recurring issue was how to get this done.
  - Food for Thought dinners are very labor intensive, as is the Touch of Christmas Fair and many other things we could do
  - Multiple participants suggested that hired staff be charged with this
    - Either new staff (the most common suggestion) or a partial repurposing of Sarah K or Margit (it was noted that Margit is already very involved with Lincoln Talk)
- Many ideas were surfaced, including more participation with town meetings, interaction with school, police and fire officials, and spiritual education for adults
- There were frequent references to both the minister and parishioners getting more actively involved

## Discussion Topic Three: Demographic Focus

To set the stage, there was a prompt by the facilitator to each group asking which of five groups we should actively target:

- Elderly
- Recently retired
- Empty nesters
- Parents with high school children
- Parents with young children

# Who do we target?

- The most common theme was we should target two groups: recently retired and empty nesters / 50+
  - The 50+ group was repeatedly noted as having suddenly more time, looking to make connections, and already a key component of our core of volunteers
  - Elderly were viewed as “already in the fold,” and they were viewed as a key group of large donors
- Simultaneously, we should not abandon families with small children.
  - Numerous comments about parents with small children were along the lines of, “Without them we do not have a church/a viable church in the future.”
  - Most groups suggested de-emphasizing parents with high school students, but one group affirmatively thought that target group should be our #1 target

## Secondary observations & supporting quotes

- “50+ are the low hanging fruit—we need to focus on the people who are here.”
- “They (50+) are the core of our volunteers”
- “My *desire* would be to have a vibrant young families program. I believe the *reality* is that will be problematic, so we need to focus on the 50+.”
- We are aging without backfilling. We have to reach out to the next generation to survive.
- The demographics of Lincoln (age of population, dearth of children, extremely high real estate values) argue against a focus on families
- Families with kids as a portion of the total in Lincoln is cyclical: with the new school, we should again be attractive to families moving in
- “We need to target families with young kids, but not as a primary target”
- For whatever groups we target, or whomever we attract, we need to get better at asking for financial support
- “Lincoln is too small; we should be looking more broadly geographically.”
- The one group that focused on families with teens as the primary target suggested
  - Racial justice initiatives may be a way to bring them in, or climate change
  - Examples were offered of successful teen attracting music programs offered in other states, especially targeting teens that were not athletically inclined

# Related Strategic Topic: Our Long-Term Future

## Fundamental Observations

- To set the stage, the script used by the facilitators encouraged the participants to be open minded and consider a wide range of alternatives
  - There was no “proposal on the table” for the participants to react to
  - As a result, there was a wide divergence of views, with many nuanced layers, and we spend considerable time covering the range of views
- We begin with what was not said: no one looking five to ten years out said, “we are fine,” or anything of that sort
  - There was general agreement that the following three trends pose a challenging future:
    - The decline in religious participation nationally (and for voluntary organizations generally), with RE declining precipitously for both UUA and UCC denominations
    - In Lincoln, the aging of the population, the dearth of school age children and the very high real estate prices pose issues for FPL seeking to broaden its base
    - At FPL in particular, we have faced 14 years of declining pledging units, an aging population and high financial reliance on parishioners 70 and older
      - While noting that this year’s stewardship campaign saw growth in pledging units and amount pledged
- There is a widespread concern that in a decade or so we *may* lose critical mass (100 or fewer members, down from our peak of 300), if we do not do something
  - One participant made it very clear: The largest donors are aware of the long-term decline in attendance pledging units and other measures, and these large donors want to know what is being done about it



# Related Strategic Topic: Our Long-Term Future

## Supporting Observations

- Role of the minister
  - There was strong consensus the new minister must have a major focus on holding and growing membership
  - A strong pre-disposition to community involvement was viewed as a positive by most commenting on this
  - But there were regular warnings that the minister “cannot do it all,” there must be staff and parishioner involvement at a high level
  - One participant posed the following: “We can afford two more minister cycles to try to grow. If that does not succeed, then we must follow a different path.”
  - A part time minister was brought up as an alternative if membership continues to decline
- Merging with another parish or sharing a minister or other form of cooperation was brought up by several participants
  - “We have three churches in this tiny town. It would help if they all worked together.”
  - “If we are not better off in five years, we should consider a merger.”
- Others expressed reservations about how successful we can be in broadening our base
  - “I am 70 years old and do not know what millennials want. We have to know if a target exists and who they are. I do not know what our target is.”
- Others expressed a more general faith that things can be turned around
  - Several said we need to change our culture be more welcoming
  - “Church membership may be declining, but I do not think the need for spiritual nourishment has.”
  - “Engage the community in things bigger than the church or bigger than one person can do”
  - “We need to proselytize, to beat on every door in Lincoln.”

# Related Strategic Topic: Our Long-Term Future

## Supporting Observations (continued)

- There was general support for doing what we are doing, and then doing more
  - As discussed at facilities, there was support for renting out or otherwise leveraging the facilities we have, both to bring in funds to support operations and to increase exposure to the local community, with the hope of gaining membership
    - But one participant warned, “If gradual degradation is our fate, we can only get so small before the real estate burden will kill us.”
  - RE had broad support as a necessity, even if participation is low
    - Multiple participants support “meals and events, to attract parents and kids”
    - “We have a lot of elderly in the church. It would not take a lot of families (15) to make a big difference.”
  - More community outreach programs had broad support: dinners with or without speakers, meals for teens, spiritual programs, FPL Green and the like
  - Musical events need to stress better that FPL is providing this to the community, and music could be a reason to explore us further
  - More broadly, one participant asked, “What is the course of action that would be a difference maker? We have been reluctant to do that. We need to step up and act.”

# Other Input

In addition to answering the strategic questions that were the primary focus of the sessions, there were a number of useful comments made on other topics, as follows

# The Minister – Additional Comments

- We need a team player and not a prima donna/narcissist
  - Divergence existed over the need for a student minister versus the ability to pay for one
  - Great sermons are key
  - We need to figure out the new minister's strengths and weaknesses, and work around the weaknesses

# Governance

## Fundamental Observations

- There was strong concurrence that the minister must have oversight by the Parish (through its representatives), with regular reviews
  - “The minister must also engage the Parish in decisionmaking.”
- There was a lack of concurrence, or better stated a lack of understanding on how the overall governance of the Parish works, and in particular how the committee structure works, and whether and how coordination of the committees, various programs and the small groups should be achieved
  - A few participants were aware of efforts being made to improve this, but there was not a good general awareness of any such efforts

## Secondary observations & supporting quotes

- While annual reviews of the minister were broadly supported, there was a divergence of opinion about the need for some form of a minister’s council or sounding board, and how that could be achieved
- There was an interest in better coordination of various programs and activities, but uncertainty as to how to do that.
- The council of committee chairs was known to exist, but was not thought to have much to do with programming coordination
- “There is too much reliance on too few volunteers,” and there is a felt need to actively recruit more volunteers generally
- There were two divergent views on small groups: (1) a great strength; versus (2) They are perceived as, and may be, exclusionary

# The Sunday Service

## Fundamental Observations:

- There were multiple comments observing, or even lamenting, that heavy reliance on a Sunday 10am service as the centerpiece to our activities may have to change
  - No one suggested eliminating the traditional service, but broadening our approach to include maybe Sunday night, or a weeknight (Wednesday and Friday came up several times) was suggested, repeatedly, as something we might/should try, to reach a wider audience
- There were multiple comments, often made with humor, that the length of announcements is too long, but it is still better than it used to be
- There were multiple requests to broaden the style of music provided during the Sunday service, while recognizing what a gift it is to have Ian

## Secondary observations & supporting quotes

- We have the space and personnel to take care of children during the Sunday service. Simply let parents know they can drop their kids off, without necessarily having to come to the service—this babysitting service would be most welcome
  - There was some pushback re safety and parental release forms, but it was asserted that other churches are doing this
- There was also some concurrence that sub one-hour services, as we have had with Zoom, are a good thing, or that much over an hour is too much
  - While there was little divergence from this, it was not typically raised as a major point
  - One participant did specifically cite the length of the sermon as recommended by UUA guidelines as too long

# Facilities

## Fundamental Observations

- There was broad based agreement we have more facilities than we need
  - “Two to three times more than we need.” “Two churches is too much.”
- There was great interest in exploring options, but no ranking of those options or discussion of a path forward, other than to say such a path should be developed

## Secondary observations & supporting quotes

- Selling the unused parcel of land above the parsonage was discussed with some interest, provided it is verified as a buildable lot, and provided the interests of neighbors are taken into account
- Finally, turning the Parish House into a community center was discussed. Again, there was some interest, but it was observed by several that any such activity should be coordinated with the Town, and how the Town expects to use the new school and Bemis Hall going forward.
- Selling any of the existing buildings along with their lots did not draw much interest.