

COMMENTS TO THE STRATEGIC PLAN, FROM 4/29 MEETING, with resolution approach

This table contains comments from the meeting that seemed to indicate a potential change.  
All the notes from the meeting are below this table.

	Page	Comment	Resolution
0.	general	(received prior to the meeting) This plan does not include actionable objectives and does not reflect Strategic Decisions	No change. See #5. The process for developing actionable objectives is defined in the plan. The plan does reflect certain Strategic Decisions, particularly those made during the Year of Decision (as stated in the Vision and Commitments.) Strategic Decisions related to property are expected to evolve from the Master Plan, and may drive changes to this Plan at a later time.
1.	general	List SP team in document	Paragraph added to Introduction.
2.	general	Steps taken to develop the plan – append to document	Diagram added as Appendix A. Reference added in Introduction.
3.	general	Question about lack of specificity – wondering what is to be done about an objective (ref template at end for implementation plan)	no change
4.	Goal 1	Should A and B be included as objectives? Should they be merged into the goal statement?	no change
5.	general	Is the term “objective” the right term to use for the items we list under goals? Would “benchmark” or some other word be more appropriate? Sub-goals? Vision points?	Keeping “Objective”; added explanation to “Goals and Associated Objectives” section.
6.	general	Is there a problem with the format of the objectives, stating them in the present tense?	no change
7.	general	Should “Channing is a church where” somehow preface the list of objectives?	Added mention of this to “Goals and Associated Objectives” section.
8.	goal 1	Should things like SGM, Meditation and	Expanded F to say the Adult enrichment program offers a

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		other individual adult enrichment programs be spelled out?	wide variety of programs and has an active ...
9.	goal 1	Should there be an objective about having a minister?	No change. This was mentioned in some YOD material but not in the higher level material.
10.	goal 1	A & B apply to current members, too.	reworded
11.	goal 1	Should we add something about association with the UUA, BCD?	added to Goal 3
12.	goal 1	Should the goal statement include “friends” as well as members?	changed
13.	Goal 2	Pro-actively get word out to people about who/what we are	Changed per #17.
14.	Goal 2	Objective A. Especially as we grow, people don’t actually <u>know</u> each other, be we hope to connect with each other; have opportunity to know, connect,...	Changed wording.
15.	Goal 2	Create an opening and welcoming character, congregational intimacy	no change; objective A covers this.
16.	Goal 2	Develop a variety of strong programs and that will attract new members.	No change. Implicit with other objectives.
17.	Goal 3	Advertising, marketing?  Also, Amy’s column	Added new objective, “The community beyond Channing is well-informed about Channing’s presence and what our congregation has to offer.”
18.	Goal 3	additional objective about stronger ties to BCD/UUA/UUSC, strengthening two-way relationship with BCD/UUA, other congregations	Added new objective.
19.	Goal 3	Address racial diversity	Added “diverse” to Objective A.

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20.	Goal 3	Footnote “Welcoming Congregation”	Added footnote. Wording from UUA website.
21.	Goal 4	Add reference to environmental responsibility in choices / decisions	No change. Recommend that the congregation be involved in establishing clear policies relative to environmental responsibility as part of the Master Plan and Green Congregation initiatives.
22.	Goal 4	Discussion about the need for standards/direction from Congregation re parameters of “stewardship”	No change. Recommend that this be pursued through the development of the Master Plan, with congregation involvement.
23.	Goal 4	Obj. H – consider tense, esp. footnote	Changed for consistency.
24.	Goal 5	Reword C: The delegation of authority is clearly defined.	Changed.
25.	Goal 5	Record what we decide and archive	see 28.
26.	Goal 5	A&B could be combined.	no change – different thoughts.
27.	Goal 5	Catalyst, Website anywhere?	Added more general objective to Goal 5, and added objective specifically about the website to goal 2, since that’s a doorway for prospective members.
28.	Goal 5	Historical record of who has done what, when, (both in and outside of church) in a database as a resource reference	Added objective - Minutes of meetings and reports of principal congregation activities, processes and their facilitators are properly documented and archived.
29.	Goal 5	In commitment – “consensus” is used v. democratic process	No change.
30.	Goal 6	Add socially responsible investing, even at a small level, as an objective	No Change – see 21.
31.	Goal 6	Question about “Staffing for Excellence” (grow professional staff to support growth of programs.	Added footnote.

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32.	Goal 6	Footnotes for specific, named programs, such as Welcoming congregation, Safe Congregation, etc.	Footnotes added.
33.	Goal 6	“Mindset of abundance”	Footnote added, and phrase moved to later in the goal statement.
34.			
35.		The end	

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### David's notes from flipchart (plus a few notes I jotted down)

(Highlighting indicates that I included it above, as potentially driving a change to the document.)

#### - List SP team in document

- Growing Together: Spiritual Growth; community – to grow stronger; relationships; being responsible together; maturity
- Establish continuity – with intention
- Template to track objectives – useful, as each can be undertaken
- Ability to re-define tasks over time – change to meet needs
- Each committee, board, etc. can use the SP to guide discussion of broader goals effectively.
- How to make the best choices. Useful tool year after year.

#### - Question about lack of specificity – wondering what is to be done about an objective

- (ref template at end for implementation plan)
- Tool to align stakeholders, committees, etc. in plans and efforts
- Good questions in early input from committees

#### - Steps taken to develop the plan – append to document

- Question of top down or bottom up – SP development was bottom up. Board may use this for top down management.
- Firmly grounded in year of decision & desires of congregation members.
- Evolution of programs in course of congregational activities
- Review process
- Time to get on with action.

### Goal 1

#### - Question of A or B as objectives. Premises rather than objectives?

- Reminders of priority per Amy. Need to continue to nurture fundamental priorities.
- Key verbs, e.g., continue, improve, for items already in place.
- Suggestions of incorporating A&B into goal? (Not necessarily)
- Focus on the objectives – are they what we want? Important?
- A&B are for existing members, not just for new members, to stay committed.
- If you preface each objective statement with “Channing is a church where...” they might make more sense in relationship to the vision.
- Discussion of whether this is a plan.
- Did anything get left out? Where do things like Meditation, Small Group Ministry, Soulful Sundown belong, get covered? (Adult enrichment?) What about having a minister? Relationship with UUA? Attend to congregation's relationship with minister.
- Mission statement – The purpose is... Benchmarks – in present tense

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- Serves as a report card.
- Goal – not just members – other participants who aren't members?

### Goal 2

- Supporting strong programs; variety
- Emphasis on taking care of current membership, as well as new members
- Pro-active numerical growth is important to future of Channing to meet challenges
- Pro-actively get word out to people about who/what we are
- Objective A. Especially as we grow, people don't actually know each other, be we hope to connect with each other; have opportunity to know, connect,...
- Create an opening and welcoming character, congregational intimacy
- Other than numerical growth, Channing has had a growth of vibrancy
- Develop a variety of strong programs and that will attract new members.

### Goal 3

- Advertising, marketing?
- Question of commitment to UUA / BCD
- CMC has more engagement with BCD now than prior years
- We could do better looking up for guidance from the UUA.
- Consider resources of various types available from others.
- collaborative opportunities
- additional objective about stronger ties to BCD/UUA/UUSC
- We have value to share with others
- connection to broader UU movement
- Address racial diversity
- Amy's column
- Footnote "Welcoming Congregation"

### Goal 4

- Add reference to environmental responsibility in choices / decisions

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- Discussion about the need for standards/direction from Congregation re parameters of “stewardship” – historic? appearance? functionality? Look at words in previous strategic plan. – probably “historic integrity ,if possible”
  - o Talk with Chris about what Property Committee needs to be told
  - o Either include guidance in SP or add objective to accomplish this
  - o YOD also captured a lot of info re historic preservation
- Obj. H – consider tense, esp. footnote
- Q re date of steeple – leave as is

### Goal 5

Reword C: The delegation of authority is clearly defined.

Record what we decide and archive  
A&B could be combined.

Catalyst, Website anywhere?

Historical record of who has done what, when, (both in and outside of church) in a database as a resource reference  
In commitment – “consensus” is used v. democratic process

### Goal 6

- Add socially responsible investing, even at a small level, as an objective
- Question about “Staffing for Excellence” (grow professional staff to support growth of programs.
- Footnotes for specific, named programs, such as Welcoming congregation, Safe Congregation, etc.
- “Mindset of abundance” – stretch thinking beyond status quo; e.g. pursuit of grant money in past few years
  - o think big, outside the box
  - o how to do what we want to do
  - o set expectations high – people rise to it
  - o “can do” mindset

### Goal 7

- B&D same? Sunday v. other events
- Be considerate of visitors as to questioning
- reports from committees at least annually
- question of whether this goal is too specific about metrics

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Tracking Template

- Are leads likely to be committee chairs?
- To what extent is staff to be involved?

**The end.**