

# Chart and Compass 2010

*5-Year Implementation Plan*

*VERSION 2005-12-11.01*

Presented to The First Unitarian Church of Dallas  
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by the Rev. Dr. Laurel Hallman, CEO

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*5-Year Strategic Plan*

## Overview

The objective of this strategic plan is to put forth a vision for The First Unitarian Church of Dallas for the next five years, and to create a strategy and a set of tasks that will realize that vision.

The First Unitarian Church of Dallas is a growing and healthy church with a congregation active in the community and supportive of their church. In 1999 the church celebrated its centennial, heralded by a \$2.1 million renovation to update and beautify the sanctuary, gathering spaces and meeting rooms. Since that celebration a second Minister has been added and the congregation has grown at a steady and healthy rate. This growth has brought new energy and focus to the congregation and positions us at a very important planning juncture.

Beginning in 2003 we hosted an 18-month dialogue with the congregation seeking to hear the longings and hopes that the people bring to our church. These conversations were an essential part of the discernment process setting the plan for our future. Our members valued the intentional focus on spirituality in worship and religious education, the well-qualified ministers and professional staff, the fiduciary care of our staff and Trustees and credited these great assets for our growth and strength. The congregation consistently asked that we find effective and meaningful ways to communicate our mission and purpose to the broader community with the clear understanding that if more people knew about us they would want to join us. A statement of Five Defining Priorities and Twenty Desired Outcomes was presented to the Board of Trustees in January of 2005.

We expect that the growth that we are currently experiencing will continue. Our commitment to that growth requires that we make specific plans to expand and improve our ministries, our programs, our staff and our facilities. This document is the first steps into that future. It will serve as Chart and Compass to direct us and plot our progress. It cannot predict every turn or impediment but will serve to name our intention and help to plan the strategies that will move us boldly into the years ahead.

## Acknowledgements

This document represents the combined efforts of scores of The First Unitarian Church of Dallas members. We would like to acknowledge particularly the work of the nine Initiative Development Committees who worked throughout the summer of 2005 to bring the vision of the “Five and Twenty” priorities and desired outcomes to life. This plan is essentially a synthesized version of their work. A majority of the ideas, and some of the text herein, is taken from the 5-Year Initiative Action Plans written by these groups. The chairpersons of these committees, who also make up the Steering Committee (with the name of the committee they headed), are:

Kate Axt, *Publicity*  
Claudia Dixon, *Facilities*  
Patty Lane, *Community Service*  
Michael McElhenie, *Public Programming*  
David Overton, *Social Justice*  
Stephen Potter, *Caring Community*  
David Samara, *Fellowship*  
Ben Stephens, *Lifespan Religious Education*  
Ann Wilbur, *Lay Leadership Development*

We would like to single out the work of the Facilities Development Committee, led by Claudia Dixon and assisted by church member Doug Guiling. This group had the unenviable task of attempting to think about our facilities needs well into the future before that future had even begun to take shape. Their hard work has helped us put shape and numbers to the facilities that will inevitably be a large financial part of our future.

We would also like to thank the at-large members of the Steering Committee, Dan Butler and Catherine Gorrell and Board liaison David Norton, for their time and energy. Charles Vorkoper dedicated additional time as well in attending the Steering Committee meetings and offering valuable input.

Finally, two church staff members deserve mention. Intern Minister Stephen Atkinson lent his informal help to several parts of this project, raising and helping to define important issues early on. And Charles McMullen, Director of Adult Religious Education, has added this project to his already busy schedule, and has been a truly invaluable member of the team.

## The Five Priorities and Twenty Desired Outcomes

Since the release of the report, Strategic Plan for 2005-2010: Five Years - Five Priorities, all our efforts have been guided by the Five Priorities and Twenty Desired Outcomes laid out in that document. It has proven to be a compelling vision, as it has engaged and energized all of us as we have strived to imagine ways to realize the future vision encompassed therein.

As a reminder of our original chart and compass, here are the original “Five and Twenty.”

### The Five Priorities

1. Create conditions which foster relationships and opportunities for members to grow in their capacity to articulate and to live an integrated understanding of their spirituality.
2. Raise awareness of Unitarian Universalism, with the goal of assuring its viability as a religious choice for future generations.
3. Claim the distinctive history and role of Unitarian Universalists, which include exercising responsibility for the quality and character of public life.
4. Enable the ministers, staff and congregation to ensure continuity when paid and volunteer positions are vacated.
5. Adapt administrative, physical, program, service, and liturgical infrastructures to accommodate growth and changes in the needs of the congregation.

### The Twenty Desired Outcomes

1. The church will be a steward of religious freedom for individuals, other religious institutions, and the community.
2. Individuals will feel called, connected, equipped, and supported to fulfill their ministries within and outside the church.
3. There will be a structured and integrated curriculum for children and adults which helps individuals develop through human-centered, spiritually deepening, tradition-sensitive, values-oriented, community-building, intellectually challenging, and personally supportive activities.
4. Veteran members will be vital to the life and continuity of the congregation.
5. New members will be assimilated easily and successfully and will find their way into a community of support and care.

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6. Individuals in paid and volunteer positions will have the resources they need to perform effectively.
7. The church will operate in a two-deep leadership model supported by knowledge management systems, so that leaders automatically mentor their successors and consistently pass on institutional knowledge.
8. There will be more Unitarian Universalists in North Texas.
9. As one of the largest UU churches in the world, First Unitarian-Dallas will be pivotal in developing the next generation of ministers, especially ministers equipped to lead larger churches, and in shaping the national Unitarian Universalist agenda.
10. Community leaders in the Park Cities and throughout North Texas will recognize First Unitarian-Dallas as a valuable resource for facilitating productive dialogue when divisive civic issues arise.
11. The church will provide members with expanded opportunities to engage in civic affairs both individually and in groups.
12. A portion of the annual budget will be designated for external ministry which is in keeping with the church's history and mission.
13. The staffing level will reflect the needs of the church.
14. The operations of the church will be environmentally responsible.
15. The church will operate from a financial model which supports advancement toward its vision and achievement of its priorities.
16. The congregation and the governing structures of this church will model "institutionalized freedom" through the practice of the democratic process, civil dialogue, and the advocacy of civic engagement.
17. The schedules for worship and educational programs will make optimum use of the physical plant.
18. The grounds and building interiors will be accessible and inviting for members and visitors, including those who are physically challenged.
19. The useful life of the physical plant will be extended by continued commitment to planned preventive maintenance and also by execution of needed repairs and refurbishments.
20. The church will implement a plan for utilizing its property to the fullest potential in service of the church's mission.

## Vision Statement

In recognition of the importance of The First Unitarian Church in the lives of its members, and honoring our role in the history and life of the larger North Texas community, the congregation embraces our growth and the challenges it brings. The Chart and Compass 2010 Plan rededicates us to the value of inclusive, supportive community; reclaims our contribution to public life in ways both bold and thoughtful; and insures that our facilities and infrastructure provide the stability and adaptability required to insure that this church remains a strong and viable option for future generations seeking religious freedom.

Here is how we have answered the charge of the Five Priorities articulated by the congregation:

*Create conditions which foster relationships and opportunities for members to grow in their capacity to articulate and to live an integrated understanding of their spirituality.*

We embody a spirit of welcome in our communal life, as individuals and as an institution. Through a network of small groups and a revitalized Pastoral Care Ministry, we will undertake to know and support one another better. A capital campaign grant will support the research and development of new, comprehensive Lifespan Religious Education curriculum, which will be offered by an expanded RE staff. A new Director of Lay Ministries will coordinate volunteer opportunities, supporting members in their efforts to find and cultivate their own sense of ministry.

*Raise awareness of Unitarian Universalism, with the goal of assuring its viability as a religious choice for future generations.*

We will ensure that all church publications and communications are clear, consistent, and informative. An enhanced web presence will offer not only opportunities for virtual community, but also ready access to information, calendars, and schedules, encouraging members and guests to participate in the life of our church. A member of our administrative staff will be designated Director of Communications and charged with ensuring our success in this area. Our distinctive programming and strategic partnerships with area organizations and institutions will raise our profile and cultivate understanding of who we are and what we have to offer.

*Claim the distinctive history and role of Unitarian Universalism, which include exercising responsibility for the quality and character of public life.*

We will create The Center for Dialogue, which institutionalizes our traditional role as advocates for civil discussion and civic engagement. Center components will include The Institute for Civil Discourse, committed to the study and teaching of dialogue capacity within the congregation, community, and denomination. The Center's First Values Lecture Series will bring prominent speakers to campus, providing opportunities to discuss ideas and concerns of the day. Other Center activities will include an Interfaith Roundtable, Town Hall Conversations, and an award to honor individuals advancing public discourse in the North Texas area.

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In support of our community service and social justice work, the Director of Lay Ministries will develop the First Church Volunteer Network using a database of member interests and skills. The Network will enable us to respond quickly to emerging events as well as supporting planned projects, such as Habitat for Humanity and Hearts and Hammers.

A social justice development team will be charged with identifying four areas of congregational focus, which will be supported by every facet of church life: we will educate ourselves with sermons, religious educational offerings, resources in the library and Book Nook, and lectures offered by the Center for Dialogue. When appropriate, the congregation will undertake thoughtful action in these areas.

Our community service and social justice work will be supported in part by a dedicated offering. The plate collections received on the first Sunday of each month will go towards our support of outreach programs.

Our music and arts ministries are an important part of our congregational life and a distinguishing contribution we make to the North Texas area. We will add music staff to meet increasing demands on our vital music ministry and we will fund new instruments to enhance the music in our worship services. Wherever possible, improvements to program and facilities will consider the potential to extend our music and arts ministries.

*Enable the ministers, staff and congregation to ensure continuity when paid and volunteer positions are vacated.*

The Director of Lay Ministries, in partnership with the Program Management Team and church voluntary organizations, will recruit and train volunteers, establish two-deep leadership and maintain organizational records to ensure continuity in the vital activities of the church.

*Adapt administrative, physical, program, service, and liturgical infrastructures to accommodate growth and changes in the needs of the congregation.*

An infrastructure and technology review will lead off plan implementation, leading to updates, training, role clarification, organizational enhancement and new hires where necessary, to insure that we have the right people and tools to conduct essential functions of church life in the context of our growing congregation and expanding programs. The duties of our professional ministries will be re-conceived, with the Senior Minister retaining primary preaching and CEO responsibilities. Additional ministers, while functioning in all facets of church life, will have oversight of specific program areas. The plan recommends that we increase our ordained ministerial staff to three by calling a minister with specialized training and experience in Pastoral Care who will share in worship and preaching duties.

Architects will be hired to evaluate and propose solutions to our space and facility needs. This plan assumes that a master plan for renovations and new construction will be completed before undertaking a capital campaign to fund this important activity. These facilities will honor our history and dedication to the arts, and especially to music in our own and the greater communities.

# The Plan

## Implementation strategies

Plan is organized around five implementation strategies, which emerged from the 5-Year Initiative Action Plans developed by the Development Teams.

- Caring for one another
- Making a distinctive contribution to the character of public life
- Educating ourselves and others
- Spreading the word
- Embracing change

We can express these five implementation strategies as the five “C words”:

<b>Caring</b>
<b>Contribution</b>
<b>Curriculum</b>
<b>Communication</b>
<b>Capacity</b>

This mnemonic chart appears in the document to distinguish the five sections of the plan.

## Format

A few notes on the format of the plan. For each implementation strategy, one or more “ends statements” are presented. These are recognizable in bold type and surrounded by horizontal rules, as shown in this example:

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**An end statement (goal, result, desired outcome, or desired “state of affairs”).**

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To realize each end will require the *means* to do so. Means are presented in the plan text in italic type and are shaded, as follows:

*A statement of means necessary to accomplish a given end.*

A cost estimate will be found at the end of each means section, and will look like the following:

Start-up                      \$5,000                                      Ongoing annual                      \$60,000

This cost estimate can be interpreted as follows. The start-up cost is a summary of one-time expenses necessary to launch a program or project. For example, to bring on a new minister we would have one-time search expenses.

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The ongoing annual cost is the amount of increase to the church's annual operating budget anticipated to implement this program or project. Note that there may be ways to incrementally implement a program (starting a new staff position out at part-time, then moving later to full-time, for example); however, the number presented here assumes that the program is fully functioning at its highest expense level.

# Implementation strategies: Chart and Compass 2010

Caring
Contribution
Curriculum
Communication
Capacity

## Caring for one another

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**We maintain structures that support our veteran members, integrate new members, care for members when they are in need, and empower and equip members for ministry within the church and the community.**

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*We will hire or call a third minister, Minister of Pastoral Care, charged with the management of Pastoral Care, who will coordinate direct service and support a network of small groups.*

As will be seen in the Capacity section, a third minister will likely be required to handle the continued expansion of our membership. We will use this opportunity to restructure the ministers' duties. The assigned minister would be responsible for overseeing all of the church's caring community and pastoral care needs. Reporting directly to the Senior Minister, the Minister for Pastoral Care will develop comprehensive strategy and programming for pastoral care and will recruit, train and manage volunteer help as needed.

The Minister of Pastoral Care will develop and deploy a comprehensive plan for pastoral care triage, management and communication and work with members to cultivate a ministry of caring presence throughout the congregation.

The Minister of Pastoral Care will also build and support a network of Small Groups for integration, education, fellowship & ministry.

Start-up	\$10,000	Ongoing annual	\$95,000
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*We will hire a Director of Lay Ministries, responsible for member assimilation and involvement, as well as lay leadership and volunteer identification, recruitment, and training.*

This new Director will also be responsible for volunteer coordination, and will be provided with appropriate technology (described in the Capacity section) to effectively perform this function. He/she will serve as staff liaison to the Program Management Team and Membership Committee. The Director will develop a comprehensive strategy and programming for new member integration, veteran member involvement, church-wide fellowship activities, affinity, and interest groups.

Work closely with Director of Communication and Office Technology Specialist to use web-based communities and email communication effectively.

Start-up	\$5,000	Ongoing annual	\$60,000
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*We will expand the charge to Program Management Team to integrate the efforts of the Director of Lay Ministries.*

This change will significantly alter the function of the Program Management Team to provide more services to—and require more accountability from—the church’s volunteer program teams. Under the new charge, the PMT will

- train program teams on the development of job descriptions for leadership positions, and require such of the groups,
- train program teams on the two-deep leadership model and insure such a model is in place,
- ensure the continuity of designated “work of the church” groups through succession planning,
- educate and help groups develop manuals for their organization to ensure continuity and organizational memory,
- educate group leaders on the use of the website as a volunteer recruitment tool, and
- provide general leadership training.

This change may require the changing of the church By-Laws, which currently spell out the role of the Program Management Team.

Start-up	\$5,000	Ongoing annual	\$7,000
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*We will improve our web site to include opportunities for communication and virtual community development.*

At minimum, the improved web site should offer

- clear notification of church events, particularly for fellowship; these notifications should be easily added to the web site via an administrative web interface and should not require an HTML editor;
- a mechanism for church staff and volunteer program team leaders to inform congregants about volunteer opportunities; the mechanism should be web-based and easy for a staff member or volunteer to use; and
- a mechanism for congregants to find and take advantage of volunteer opportunities

(See the Capacity section for more information on web site revisions and improvements.)

Start-up	\$8,000	Ongoing annual	\$1,000
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Caring
Contribution
Curriculum
Communication
Capacity

## Making a distinctive contribution to the character of public life

**As leading presenters of opportunities and training for civil dialogue, we improve the quality of public conversation in the North Texas area and within the denomination.**

*We will found The Center for Dialogue at The First Unitarian Church of Dallas, hiring a director of the Center and administrative support.*

As Unitarian Universalists, our congregations thrive when we embrace a shared search for knowledge and understanding. At a time when the larger community of our country is increasingly challenged to discuss critical issues openly, honestly, and respectfully, we have a distinctive contribution to make: we will cultivate and share our willingness and capacity to engage in conversation encompassing differing perspectives.

A second, equally important, function of The Center is to deepen our role within the community of the UUA, as First Church becomes a noted training church for future ministers.

Start-up	\$70,000	Ongoing annual	\$145,000
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The Center will be comprised of the following components.

### The Institute for Civil Discourse

We will train church and community members to facilitate free and open discussion. This training will range from introductory offerings to high-level certification.

### Applied Theology Seminars

We will provide seminars, workshops, institutes and ministry practicum that will equip ministers and lay-leaders for practical application of liberal theology in the communities they serve. A "Theologian in Residence" program will bring important thinkers to Dallas for special seasons of study and training. Seminars will undertake subjects that will include UUA Study Issues, social justice topics and the role of religion in the public dialogue, among others.

Start-up	\$20,000	Ongoing annual	\$55,000
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### *First Values* Lecture Series

An annual lecture series will enable us to bring leading voices to speak on a variety of topics. In conjunction with these lectures, we will provide opportunities for further discussion, such as response panels, question-and-answer sessions, workshops and informal gatherings. We will seek other sources of funding to support the lectures.

Start-up	\$5,000	Ongoing annual	\$50,000
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**Special Events**

- **Town Hall Conversations and Interfaith Roundtable Discussions**

In partnership with area churches and institutions, the Center will hold community meetings, using trained facilitators, to discuss areas of shared concern.

- **Award**

Each year, the Center will honor a member of the greater Dallas community for their efforts to advance civil public discourse. There may be opportunities here to name and fund the award to honor a member of our church who has made an outstanding contribution in this field.

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**We improve the lives of individuals, families, and communities in times of greatest need.**

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*We will establish, maintain, and utilize a thorough database of member interests and abilities to create a First Church Volunteer Network.*

Under direction of Lay Leadership/Ministries, we will create and utilize the First Church Volunteer Network, which will enable the Director of Lay Ministries and others to quickly identify members by interest and ability. Using this information, we can more effectively build teams for service and social justice projects. We will examine the Jericho Road model as a vehicle for providing distinctive services.

Start-up	\$20,000	Ongoing annual	\$1,000
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*We will make a renewed commitment to service and social justice programs.*

As founding members and leading supporters of North Dallas Shared Ministries and active participants in other vital programs, First Church will demonstrate its expanded commitment by

- dedicating “First Sunday” plate collections to the support of community service programs,
- using our volunteer database to match our members’ passion and expertise to community service and social justice projects.

Start-up	\$0	Ongoing annual	\$0
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(We believe that this initiative will actually pay for itself through increased Sunday collection plate giving.)

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**We examine and respond to issues of social justice.**

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*We will identify four areas of focus.*

Attempts to address too broad a range of social justice concerns yield superficial contributions. Therefore, the Social Justice Strategic Plan Development Team is empowered to conduct research, surveying our congregation, reviewing UUA materials, considering the needs of our local community as well as current national and international social justice topics, and to determine areas of focus for church effort in the next five years. The Team is asked to complete this research and report their recommendations to the Senior Minister by the end of 2006.

Start-up	\$1,000	Ongoing annual	\$0
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*We will educate ourselves.*

The library and Book Nook will enhance their collections addressing areas of focus. In addition, Adult Religious Educational offerings and specially-targeted lectures and workshops will provide additional opportunities to explore social justice issues in depth. There are obvious opportunities here to leverage the Institute for Dialogue.

Start-up	\$0	Ongoing annual	\$5,000
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*We will undertake thoughtful action.*

Under the oversight of the Director of Lay Leadership and the Minister for Outreach and Advocacy, we will undertake thoughtful action in the areas of our focus.

Start-up	\$0	Ongoing annual	\$5,000
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*We will use our volunteer database and network (see the Caring section) to address important emerging issues.*

The First Church member database and the Director of Lay Ministries will be called on to engage interested members in social justice issues as they may arise.

Start-up	\$0	Ongoing annual	\$0
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Caring
Contribution
Curriculum
Communication
Capacity

**Educating ourselves and others**

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**We offer transformative educational experiences for every stage of life.**

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*We will develop a comprehensive curriculum.*

The current curriculum, while a good one, does not properly build on itself or reinforce Unitarian Universalist values in a regular and logical manner. We feel it is important to first teach children about Unitarian values and beliefs before

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introducing children to other religions. The current curricula are an erratic mix of comparative religions and UU values. While different age groups (children, young adults, adults and seniors) will have different wants and needs, there should be an effort to unify the curriculum over the entire lifespan of the congregant.

This will be a significant effort, and we have allocated considerable time and money to the accomplishment of this goal. We feel that this is a ministry both to our own congregants as well as to other Unitarian Universalists. We believe that if First Unitarian invests in a curriculum which can be "packaged" and reproduced, we have a reasonable chance of selling this curriculum to other Unitarian Churches, thus recouping some or all of our additional cost.

Start-up	\$150,000	Ongoing annual	\$0
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*We will expand our offerings for youth and young adults.*

We are, at present, understaffed as evidenced by current staff working many hours off clock and taking work home. Additionally, we have identified several categories of underserved populations (for example, high school, young adult, emerging gay and lesbians) that could be reached if staffing levels were increased. Furthermore, several deficiencies in current youth religious education have been identified (poor continuity between classes, weak definition of UU identity, minimal building upon previous material). These deficits can be directly addressed with more staff.

We will increase the Children's RE staff by moving the current Youth Director position from half to full time and adding a half time Young Adult Campus Minister.

Additionally, we will move the current Director of Adult Religious Education position from three-quarters to full time.

Start-up	\$5,000	Ongoing annual	\$70,000
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*We will examine the possibility of offering a pre-school program.*

Religious education programs must meet the specific needs of families with very young children. The larger community needs and deserves viable alternatives to fundamentalist and traditional faith-based early childhood education programs.

The Director of Religious Education will convene a committee of parents with home schooling experience, teaching experience, and/or administrative experience in an educational institution. The committee will elect co-chairs to be responsible for administrative duties of the committee. Under the leadership of the co-chairs, the committee will develop and distribute a

survey/questionnaire on the topic of values-based early childhood education sent to UU families and others identified as sharing the values of a liberal, non-creedal faith.

Start-up \$0 Ongoing annual \$0

Caring
Contribution
Curriculum
<b>Communication</b>
Capacity

## Spreading the word

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**Our communications clearly and consistently reflect who we are, make information about our church accessible and usable, and encourage participation.**

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*We will develop a church-wide branding message with consistent graphic look.*

As a church with over one hundred years of history, we have a strong identity: we know what we stand for. We now need to associate a visual component with that historical identity so that the greater community begins to associate our communications with that rich history and identity. By developing this “look and feel” to our communications, we will firmly establish our place in the community and leverage our history as other parts of this plan bring us more into the public eye.

Start-up \$5,000 Ongoing annual \$0

*We will combine our member database with appropriate technologies to reach our members in new and effective ways.*

An enhanced member database, centralized for use by all areas of church life, will enable us to target communications to those most likely to be interested, while preventing overload to other members.

As e-mail becomes an increasingly important communication channel, we will use the member database to drive messages via the internet to appropriate members. In particular, we will use the combination of the member database, the web site, and e-mail communication to facilitate a new level of volunteer coordination to engage our members in service. (The cost of this activity is included in other activities in this plan.)

Start-up \$0 Ongoing annual \$0

*We will establish a Communications and Publications office.*

We have reached a point where church communications are spread among several staff members. With the addition of e-mail communication and a significant increase in volunteer communications, it is time to consolidate church communication functions. We will hire or designate a Director of Communication and Publications. This Director will manage the following existing and new communications functions:

- brand/identity creation and management
- public relations
- advertising
- e-mail
- web presence

The Director will be charged with using the best professional services that we can afford, on a pro bono basis as often as possible. He or she will coordinate our efforts with other North Texas UU congregations and the UUA to leverage efforts and expense. The Director will coordinate all activities with the existing volunteer publicity committee.

We acknowledge that the web has become a particularly rich resource for people finding our church. We must continue to make the most of this resource and to use the church web site for expanded information and communication, expecting cost savings as we move away from paper and postage.

The new Director of Communications will work closely with the Director of Lay Ministries to coordinate and maintain a comprehensive web-based database of church members.

Start-up	\$5,000	Ongoing annual	\$70,000
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*We will begin to communicate our message to the larger community by establishing a regular publicity and marketing campaign.*

With our identity and branding established, and having appointed a Director of Communications, we are well-positioned to utilize these resources to indeed “spread the word.” This initiative will be the first of what must probably become a regular activity of the church.

Start-up	\$0	Ongoing annual	\$10,000
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Caring
Contribution
Curriculum
Communication
Capacity

## Embracing change

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**Our infrastructure accommodates worship, religious education, programs and assembly.**

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*We develop a facilities master plan.*

We will immediately form a Master Planning Task Force, consisting of appropriate members of the church staff, board, strategic planning Steering Committee, etc. The Task Force will have as its goal the development of a Facilities Master Plan that looks forward ten years and makes specific plans for the next five years, including

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- a comprehensive analysis of the types of space needed over the ten year planning horizon
- a high-level plan of how we will achieve those needs (e.g., we will rent 5000 sq ft of temporary space beginning in fall 2006; we will build a new RE/office building on our empty lot, to be completed by fall 2008; the new facilities will meet our needs through 2015)
- a detailed plan for renovation/repurposing of existing facilities and the construction of new facilities to meet the needs determined above
- the inclusion of appropriate facilities to continue and further our dedication to the arts, and particularly to music
- analyze existing facilities for fire and safety
- a furnishings plan (likely requiring the expertise of a space planner or other professional)
- a detailed plan for temporary space, as necessary
- a forward-looking statement that provides direction to the church for facilities planning over a 20-30 year timeline

Start-up	\$50,000	Ongoing annual	\$0
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*We will make interim improvements to the sanctuary.*

We will install an improved sound system and appropriate hardware and software for new kinds of performances or worship services.

Start-up	\$75,000	Ongoing annual	\$0
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**We have the right people and the right tools.**

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*We will conduct an infrastructure review in 2006.*

To allay fears about adding staff inappropriately, and to reassure and help the existing staff as we begin to move toward expansion, we will conduct a management and technology review in 2006 before significant staff additions are made. The management review will talk to all support staff, review and revise job descriptions, recommend new hires where necessary, identify process and technology weaknesses and make recommendations (e.g., "ACS and the volunteer database need to be connected; buy the ConnectIt module from ACS and train Diane, Laura, and Tim on it.").

Start-up	\$20,000	Ongoing annual	\$0
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*We will begin a "Resource Team" model in the church office, hiring an Office Technology Specialist.*

Instead of redundantly hiring expertise across programs and other church functions, we will move toward implementing a "Resource Team" model, placing an expert or experts (say in office technology) in the "central office" to provide consultative support to the programs.

The first position anticipated in the Model will be an Office Technology Specialist. This person will be responsible for ensuring that the entire staff is operating effectively and efficiently in the realm of office technology, particularly in the use of the computer systems, church management software, word processing, spreadsheets, presentations (written and otherwise), the church web site, the membership database, and email. Other specialists in the future might be a training specialist, a development professional, or a graphic artist.

Start-up	\$5,000	Ongoing annual	\$50,000
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*We will commission a general web update to include providing a capability for staff content updates.*

Start-up	\$50,000	Ongoing annual	\$0
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*We will provide funding for the continuation of the Intern position after the current endowment is exhausted.*

Start-up	\$0	Ongoing annual	\$40,000
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*We will add to the music staff.*

As the congregation grows, it is likely that we will add a third service in the near future. This will require the addition of half-time music professional to handle not only the additional worship service requirements, but the ancillary services that are also part of our music ministry (weddings and other special events, special services, and others).

Start-up	\$2,000	Ongoing annual	\$22,000
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*We will add to the Facilities Maintenance staff at the appropriate time during our renovation and new construction efforts.*

Start-up	\$2,000	Ongoing annual	\$40,000
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*We will increase the professional development budget for church staff.*

It is in our best interest to hire dedicated, competent staff and help them grow in capacity and effectiveness throughout their tenure with the church. We will

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increase the professional development budget for church staff to allow for one week of professional development for most positions each year.

Start-up	\$0	Ongoing annual	\$10,000
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*The Senior Minister will prepare a ministerial plan by the end of 2006.*

This plan will take into account issues such as sabbatical planning, retirement planning, and role differentiation, to the end that the church remains strong through inevitable changes and growth in the ministerial staff.

Start-up	\$0	Ongoing annual	\$0
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## Cost

This section the Implementation Plan begins to discuss the cost and funding issues that will be fundamental to the Plan's accomplishment.

### One-time costs

#### Building

It is clear that the Chart and Compass 2010 plan will require additional physical space for both congregational growth and new programs. The Facilities Development Team analyzed the space needs and arrived at a net figure of 10,750 square feet of new space needed. In addition, there will likely be retrofitting of existing space needed as functional areas are rearranged. As the following rough calculation shows, we are likely looking at an approximate cost of about \$4 million to design, build, and furnish this space.

New net space	10750
Circulation, etc.	20%
Gross sq ft	12900
Cost/sq ft	\$175
Building cost	\$2,257,500
Architect fee	10%
Architect fee	\$225,750
Furnishings	\$500,000
Total new building cost	\$2,983,250
Renovation of existing space	\$1,000,000
<b>Total new and renovation cost</b>	<b>\$3,983,250</b>

#### Start-up costs for projects and programs of this plan

The start-up, or one-time, costs for the activities proposed in this plan are listed at the end of each such activity in the body of the plan. The total of these costs is \$512,000.

#### Property loan to be paid in full

We propose that the loan on the new property east of the existing church property on St. Andrews be paid in full, a total of \$875,000

#### Pre-school not included

The activities proposed in this plan regarding a potential pre-school at the church only involve investigating this possibility. Consequently, while there could possibly be significant start-up and ongoing costs associated with such an undertaking, neither these costs nor the possible offsetting revenues are reflected in this plan.

## Summary of one-time costs

New building and existing facilities renovations	\$4.0 million
Pay off property loan	\$0.9 million
One-time project and start-up costs associated with this plan	\$0.5 million
<b>TOTAL ONE-TIME COSTS</b>	<b>\$5.4 million</b>

## Operating budget

By the end of the Chart and Compass 2010 plan period, additional programs and additional growth in the congregation mean that the operating budget of the church will need to grow significantly.

Increased maintenance costs for new and renovated facilities	\$0.2 million
Program-related increases	\$0.7 million
<b>TOTAL OPERATING BUDGET INCREASE (going into 2011)</b>	<b>\$0.9 million</b>

It should be noted here that this increase does not allow for increases in the budget that may be required simply to accommodate membership growth (such as additional Children's Religious Education materials and supplies or additional administrative staffing).

## Potential revenue sources

In addition to funding the Chart and Compass 2010 from our own internal resources, we have identified opportunities for other revenue, including

- A potential of roughly \$100,000 of external grant funding for new programs (such as the Center for Dialogue).
- The sale of a new Lifespan Religious Education curriculum to other UU churches.

## **Appendix A: Estimated Costs**

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**Expense Estimates in 2005 Dollars**

Strategic Plan			Expense \$=000	
Section	Pg & Seq #	Strategic Plan Activities	Startup	Ongoing
Caring	9.1	Office Setup for Care Team Vols.	\$ 1	
Caring	9.1	Care Tm, Caring Netwk, Life Span Supplies & Printing		\$ 1
Caring	9.1	FT Minister (\$72)		\$ 93
Caring	9.1	Office P C Setup for Minister	\$ 5	
Caring	9.1	Small Group Ministry Training	\$ 2	
Caring	9.1	Small Group Enrollment Events/Publicity		\$ 1
Caring	9.1	Kiosk, Signage & Wayside Pulpit Signs	\$ 2	
	<b>9.1 Total</b>		\$ 10	\$ 95
Caring	9.2	Director of Lay Ministries (\$40)		\$ 60
Caring	9.2	Office setup	\$ 5	
	<b>9.2 Total</b>		\$ 5	\$ 60
Caring	10.1	Organization Manual	\$ 2	\$ 1
Caring	10.1	Activities Booklet	\$ 2	\$ 1
Caring	10.1	Leadership Development Training	\$ 1	\$ 5
	<b>10.1 Total</b>		\$ 5	\$ 7
Caring	10.2	Website Enhancement/Maintenance	\$ 8	\$ 1
	<b>10.2 Total</b>		\$ 8	\$ 1
<b>Caring Total</b>			<b>\$ 28</b>	<b>\$ 162</b>
Contribution	11.1	Center for Dialogue Director (\$50)		\$ 68
Contribution	11.1	Office setup for Director	\$ 5	
Contribution	11.1	Admin Assistant for Center (\$25)		\$ 37
Contribution	11.1	Office setup for Admin Assistant	\$ 2	
Contribution	11.1	Website Enhancement/Presence	\$ 15	\$ 5
Contribution	11.1	Program Presenters/Lecturer Fees		\$ 20
Contribution	11.1	Space Rental		\$ 15
Contribution	11.1	Center for Dialogue furniture	\$ 48	
	<b>11.1 Total</b>		\$ 70	\$ 145
Contribution	11.2	Training Costs		\$ 20
Contribution	11.2	Presentation Materials		\$ 5
Contribution	11.2	Curriculum Design	\$ 5	
Contribution	11.2	Consultant/Subject Matter Experts	\$ 10	
Contribution	11.2	Contract Theologian/Faculty		\$ 30
Contribution	11.2	Office setup for Theologian	\$ 5	
	<b>11.2 Total</b>		\$ 20	\$ 55
Contribution	11.3	Public Lecture Series Fees & Expenses		\$ 50
Contribution	11.3	Website Enhancement/Maintenance	\$ 5	
	<b>11.3 Total</b>		\$ 5	\$ 50
Contribution	12.1	Volunteer Database Software	\$ 20	
Contribution	12.1	Volunteer Database Supplies & Printing & Updates		\$ 1
	<b>12.1 Total</b>		\$ 20	\$ 1
Contribution	12.2	Dedicate 1st Sunday collection for outreach ministry	\$ -	\$ -
	<b>12.2 Total</b>		\$ -	\$ -
Contribution	13.1	Identify 4 areas of focus	\$ 1	\$ -
	<b>13.1 Total</b>		\$ 1	\$ -
Contribution	13.2	Library Books		\$ 1
Contribution	13.2	Travel & Expense for Subject Matter Experts		\$ 3
Contribution	13.2	Memberships, Supplies and Recognition		\$ 1
	<b>13.2 Total</b>		\$ -	\$ 5
Contribution	13.3	Undertake thoughtful action	\$ -	\$ 5
	<b>13.3 Total</b>		\$ -	\$ 5
Contribution	13.4	Apply Volunteer Database to engage members		\$ -
	<b>13.4 Total</b>		\$ -	\$ -
<b>Contribution Total</b>			<b>\$ 116</b>	<b>\$ 261</b>

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**Expense Estimates in 2005 Dollars**

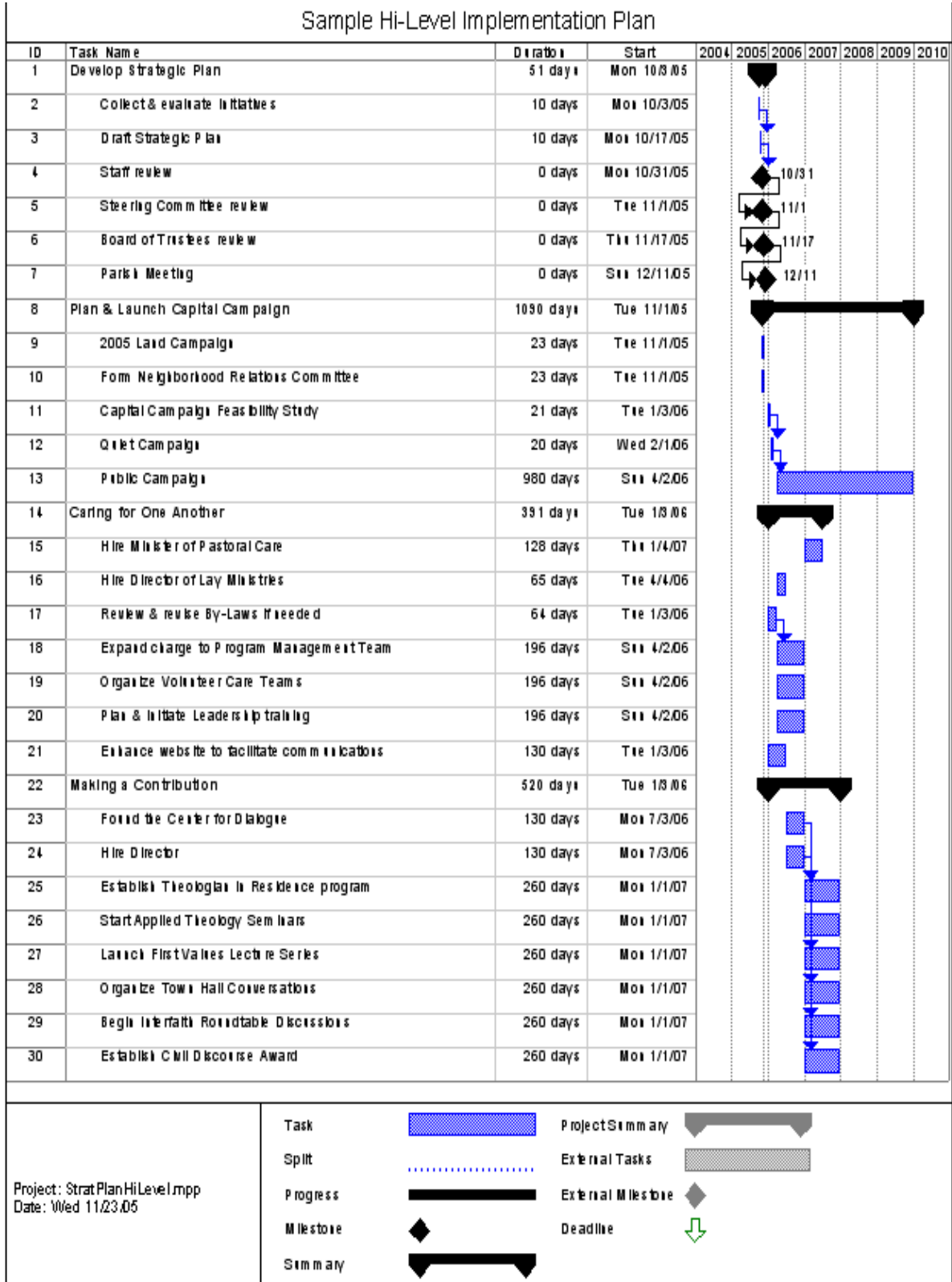
Strategic Plan		Strategic Plan Activities	Expense \$=000	
Section	Pg & Seq #		Startup	Ongoing
Curriculum	14.1	RE Curriculum	\$ 150	
	<b>14.1 Total</b>		\$ 150	\$ -
Curriculum	14.2	Increase Youth Director to FT (\$40)		\$ 30
Curriculum	14.2	PT Young Adults Director (\$40)		\$ 22
Curriculum	14.2	Office setup for Young Adults Director	\$ 4	
Curriculum	14.2	Office supplies for Young Adults Director		\$ 1
Curriculum	14.2	Increase 3/4 ARE Director to FT (\$60)		\$ 18
Curriculum	14.2	Office supplies for Committee for Young Adults	\$ 1	
	<b>14.2 Total</b>		\$ 5	\$ 70
Curriculum	15.1	Research pre-school program		\$ -
	<b>15.1 Total</b>		\$ -	\$ -
<b>Curriculum Total</b>			\$ 155	\$ 70
Communication	15.2	Develop Branding	\$ 5	
	<b>15.2 Total</b>		\$ 5	\$ -
Communication	15.3	Link Member Database & technology to improve communication		\$ -
	<b>15.3 Total</b>		\$ -	\$ -
Communication	16.1	Director of Publications & Communications (\$50)		\$ 70
Communication	16.1	Office setup for Director	\$ 5	
	<b>16.1 Total</b>		\$ 5	\$ 70
Communication	16.2	Publicity and Marketing Campaign		\$ 10
	<b>16.2 Total</b>		\$ -	\$ 10
<b>Communication Total</b>			\$ 10	\$ 80
Capacity	17.1	Facilities Master Plan	\$ 50	
	<b>17.1 Total</b>		\$ 50	\$ -
Capacity	17.2	Interim Sanctuary AV, Lights, HW & SW Enhancements	\$ 75	
	<b>17.2 Total</b>		\$ 75	\$ -
Capacity	17.3	Infrastructure Review(HW&SW, Sec, Phon, Netwk)	\$ 20	
	<b>17.3 Total</b>		\$ 20	\$ -
Capacity	18.1	FT Office Technology Specialist (\$35)		\$ 50
Capacity	18.1	Office PC Setup for Office Technology Specialist	\$ 5	
	<b>18.1 Total</b>		\$ 5	\$ 50
Capacity	18.2	General website update	\$ 50	
	<b>18.2 Total</b>		\$ 50	\$ -
Capacity	18.3	FT Intern (\$30)		\$ 40
	<b>18.3 Total</b>		\$ -	\$ 40
Capacity	18.4	PT Assistant Music Director (\$40)		\$ 22
Capacity	18.4	Office PC Setup for Asst Music Director	\$ 2	
	<b>18.4 Total</b>		\$ 2	\$ 22
Capacity	18.5	FT Facilities Maintenance (\$28)		\$ 40
Capacity	18.5	Office PC Setup for Facilities Maintenance	\$ 2	
	<b>18.5 Total</b>		\$ 2	\$ 40
Capacity	19.1	Staff Training		\$ 10
	<b>19.1 Total</b>		\$ -	\$ 10
Capacity	19.2	Ministerial Plan		\$ -
	<b>19.2 Total</b>		\$ -	\$ -
<b>Capacity Total</b>			\$ 204	\$ 161
	<b>Grand Total</b>		\$ 512	\$ 734

## **Appendix B: Sample Task Chart**

The sample project implementation plan is for illustration purposes only. It makes assumptions about funding availability and task duration which will need to be fully researched and adjusted during development of the detailed implementation plan.

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Sample Hi-Level Implementation Plan



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