

Timeline of Growth and Strategic Planning Initiatives

November 1997 Ministerial Search Survey

- Themes created by the free response question “*What are the main things that you would like to see the congregation accomplish or get involved within the next three to five years*” indicated that the congregation was very interested in doing social justice work, reaching out to the local community, and stabilizing and healing the congregation.
- **54 people responded when asked if they wanted the church to grow: 31 responded yes, 19 were indifferent, 4 responded no.**

October 1999: Long Range Planning Workshop

- The congregation participated in focus groups and five main themes to work on evolved: excellence in “doing church”, enhanced programming, making a difference in people’s lives, a caring community, and spirituality, which was not defined.

April 21, 2002: Howell Lind Workshop

- This workshop culminated in a Sunday worship service in which members of the congregation were asked where they wanted the church to be in seven years. The material gathered from this event reflected a desire to do more and do it better in the areas of religious life, church community, religious education, social justice/community outreach, church activities, and music.

Oct. 2004: UUA Consultant Jeri Moulder

- conducts a two day weekend workshop with 20 leadership people on Saturday and on Sunday a workshop with the congregation.

Jan. 2005: Vision Workshops

- are held during Vision Week for members, friends and youth. Comments are recorded and writing of the Strategic Plan is begun.

Apr. 2005: Recorded comments

- are presented to and discussed with the Board and appropriate committees.

Sept. 2005: LRP Committee members

- begin to take Strategic Areas to committees and groups that will be working in those areas for their review and approval. Board uses the Strategic Areas in their planning at their retreat.

Nov. 2005: Starting to write

- Material gathered from committees and groups in Sept. is collected and written into the Strategic Plan.

Jan. 2006: Draft of the Strategic Plan is presented to the Board for review.

March 2006: Strategic Plan approved by the Board.

April 2006: Strategic Plan posted on the Members Only area on the church website.

- Office copy given to Administrator.

June 2006 Adoption of Strategic Plan by the Congregation

- Desire to participate in a more focused program of service and outreach that

will increase the visibility of OCUUC and engender more respect in Orange County for our liberal values and religious principles.

- Need religious programming for children, youth and adults that more fully meet the spiritual and intellectual needs of our congregation
- Desire to worship in alternative ways that include children and youth and will attract young adults to our Unitarian Universalist faith.
- Need to streamline our workforce of volunteers and staff so the work of the church is done more effectively.
- Need to market ourselves better through advertising and community outreach.
- Continue to be more welcoming to visitors and to repel fewer of them.
- Integrate new members more intentionally into our community.
- Clarify our decision-making structure so that it is vision-focused, responsive, accountable, and transparent.
- Create a culture of generous giving, careful spending, and improve communication with the congregation about the financial workings of the church.

Fall 2006 New Site Committee formed by Board, appraisal authorized and received.

- Purpose is to explore the market values and feasibility of moving to a different site

Spring 2007 Conversations begin with Tapestry

- Ministers and Presidents meet to explore possible interest in sharing a building

June 2007 Congregation authorizes conversations with Tapestry

- Purpose is to consider options for collaboration.

Summer 2007 Joint Board meetings indicate interest in further explorations

- Exploratory Task Force is formed

Fall 2007 Exploratory Task Force investigates ways to collaborate and analyzes congregations

- Develops three collaboration options: sharing programs, sharing building without merger, and merger. Recommends merger as offering best opportunities for synergy and growth.
- Creates Exploratory Task Force Report comparing and contrasting the two congregations

January 2008 congregation authorizes continuation of exploration and XXXXX

April 13, 2008 Motion to commit to merger with Tapestry if an acceptable site is found fails 21-79.

June 2008 – Congregation authorizes formation of Growth Team