

Hi



Sunday, 12 JAN 2020 – Speaker: Bruce Wood

Purpose of Presentation:

Establish a collaborative, strategic planning process for MLUUC's pursuit of its mission.

Source of Presentation:

Recommendation to the Congregation from the Board of Directors and the Vision Team.

Concept of Planning Process:

No committee will write a plan in isolation and present it to the Board for approval, who will thereafter present it to the Congregation.

Instead, through a collaborative, consensus-building process, the Congregation will provide guidance and direction to the Board for strategic goals and the process for accomplishing those goals.

Precedents:

Lessons learned from the successful, collaborative planning processes our MLUUC Congregation used to:

Guide the planning to remodel our current building in June and July of 2017,

Set directions for MLUUC social justice programs, both local and global, on March 15, 2015.

**Strategy** flows from commitment to mission and values. Mission and values for MLUUC are printed on the back of your bulletin. For us, the 7 UU Principles are our organizational values.

Strategy includes Goals, Objectives, timelines, and business processes MLUUC will use to pursue its mission and **interact with its environment**, in accordance with MLUUC's values (7 UU Principles).

Our organization's **environment** consists of those people, agencies, and dynamics outside the control of MLUUC, but with whom MLUUC must work to pursue its mission.

Those in our environment cannot see our Mission or our Values, but they can see our Strategy.

Those in our environment can see our behavior and judge how effectively, and with what level of integrity and commitment, MLUUC pursues its mission and exemplifies its values as we implement our Strategy.

**Inclusion, Collaboration, and Consensus** are critical methodological criteria for successful strategic planning.

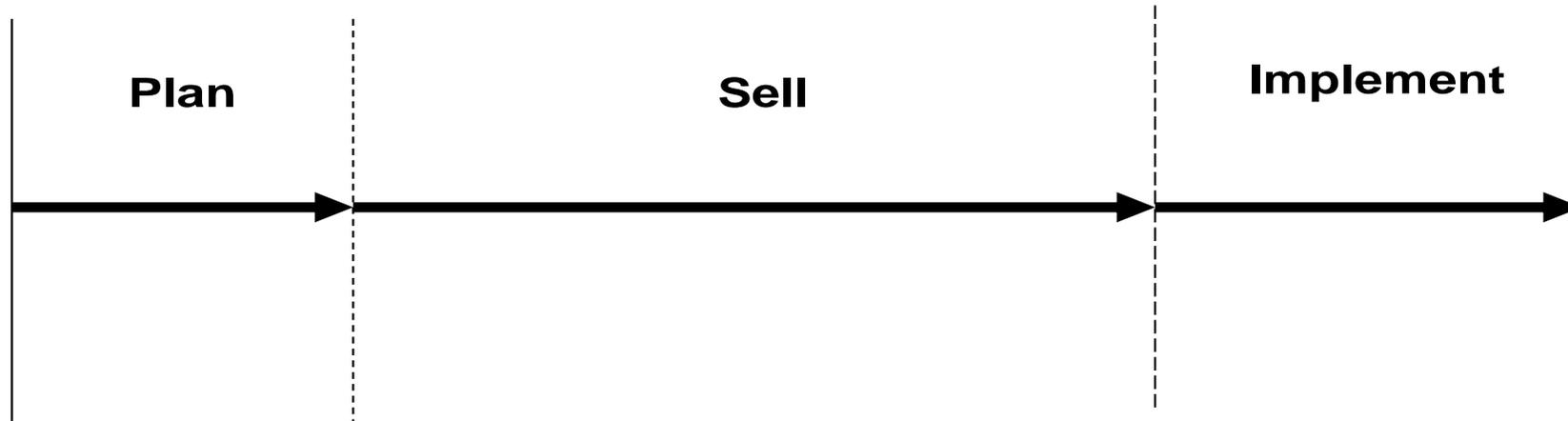
**Include** as many stakeholders as possible in both the design and implementation of the process.

**Collaborate** through structured, facilitated, and recorded processes designed by the stakeholders who will use them.

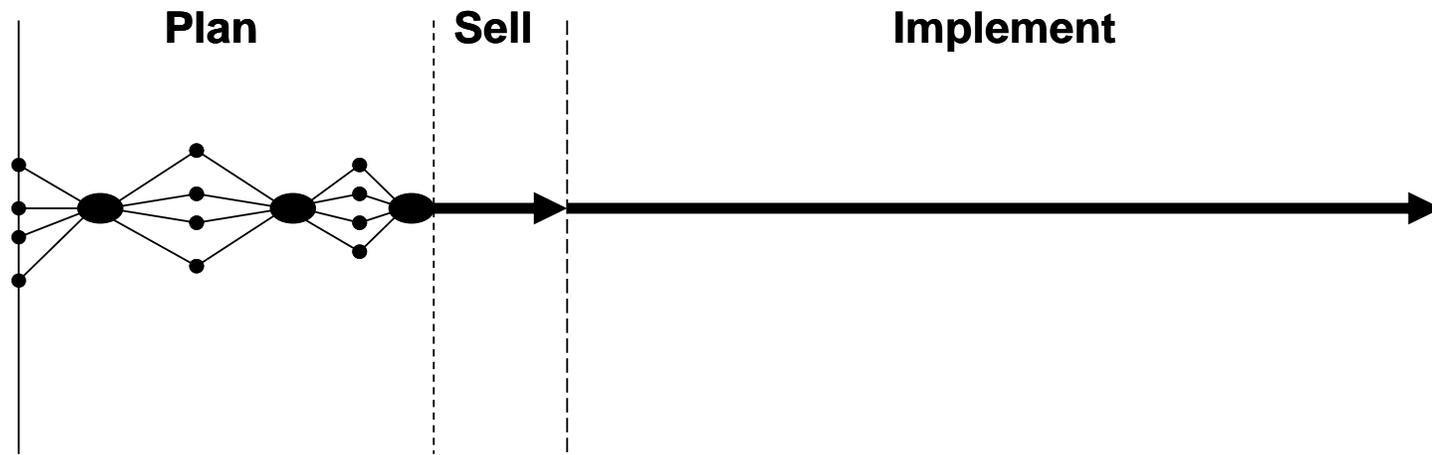
**Strive for consensus** to reach win/win decisions for both process and content of planning.

Keep in mind: Successful, collaborative planning requires mission and task **focus, discipline, and humility.**

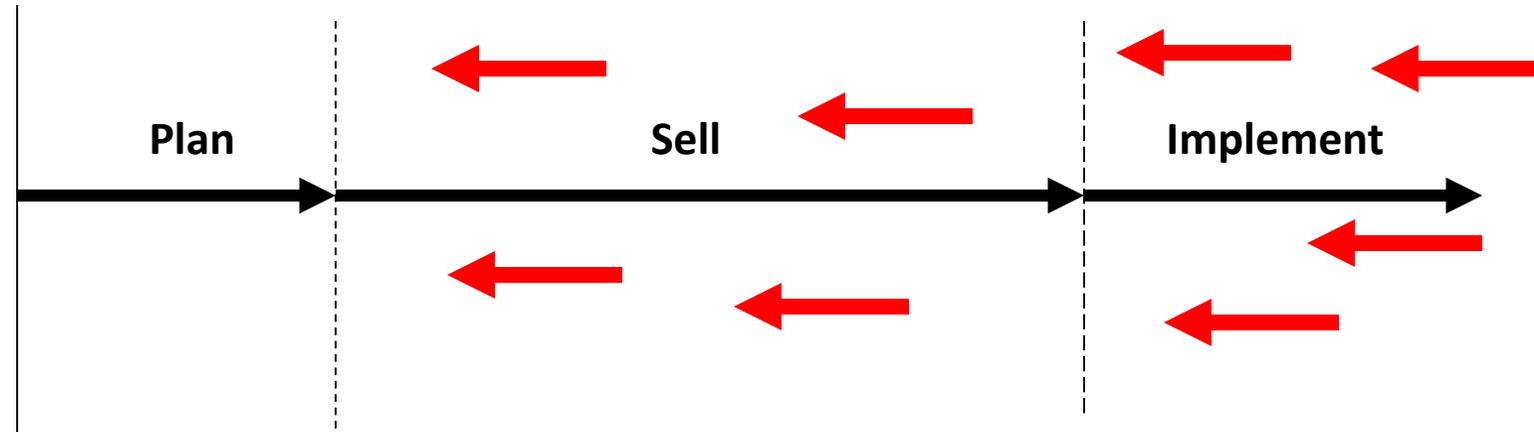
# Linear Planning:



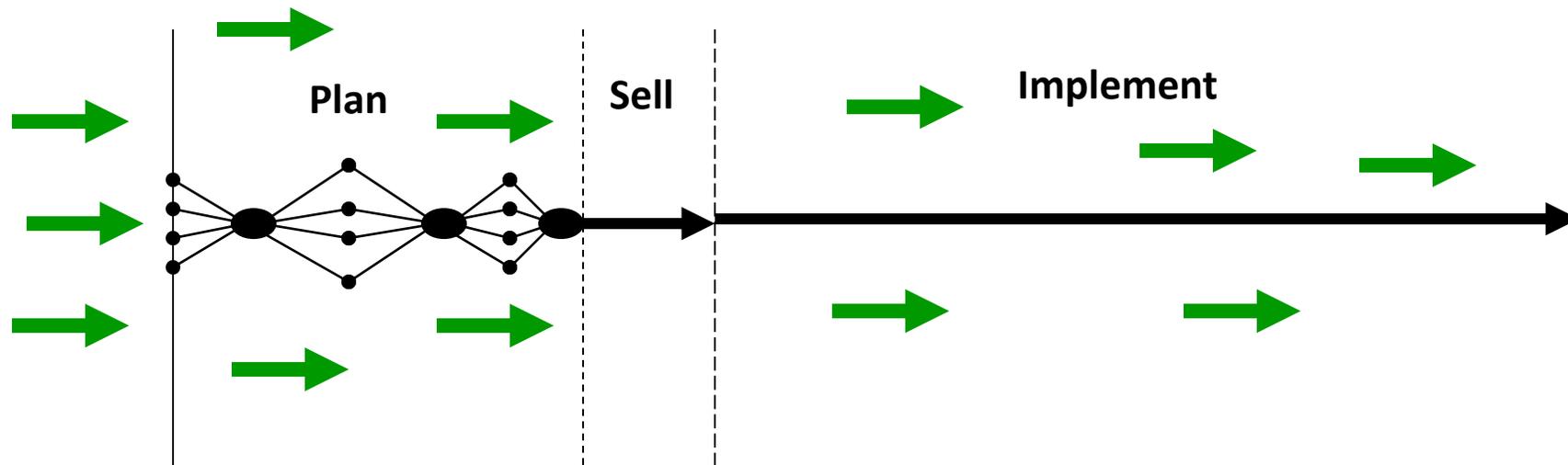
# Collaborative Planning:



In **Linear Planning**, the blockers apply force and push against implementation.



In **Collaborative Planning**, the potential blockers are included from the beginning.



## Decision Making Methods

### Lose/Lose

- Stalemate
- Protest
- Strike
- Riot
- War

### Win/Lose

#### Majority Decision

- Election
- Referendum
- Legislative Vote

#### Individual Decision

- Executive Decision
- Judicial Decision
- Arbitration

### Win/Win

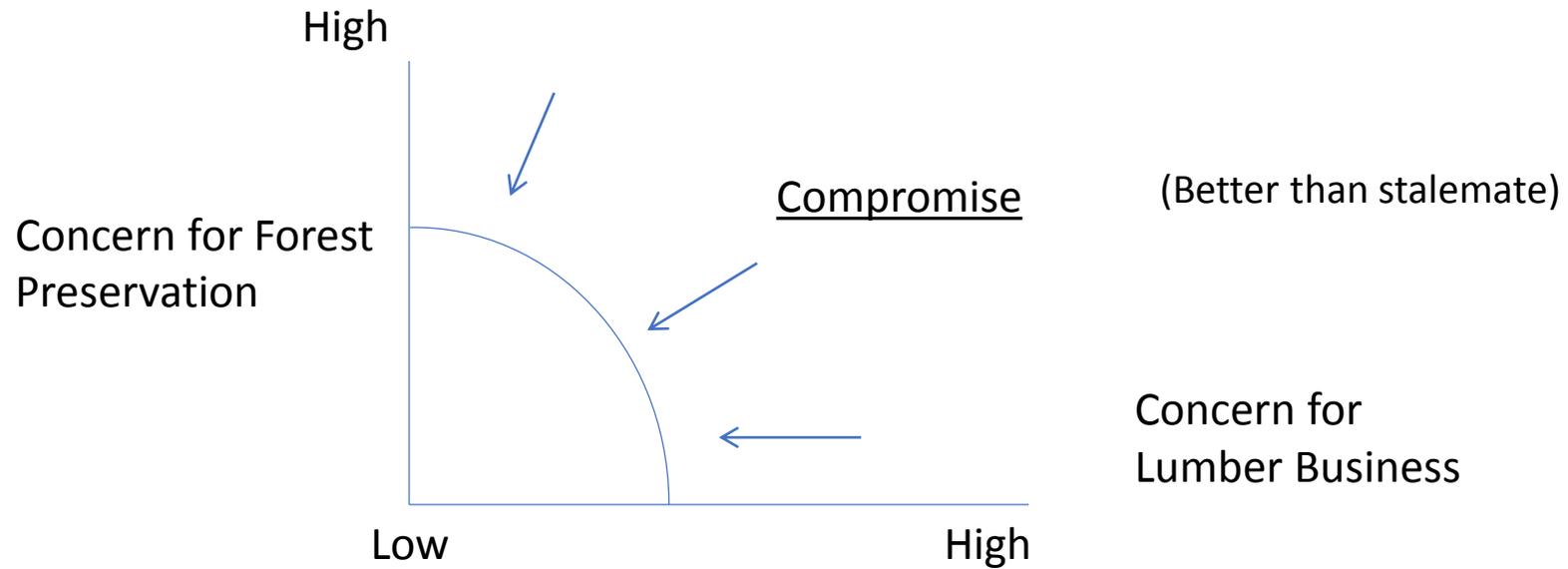
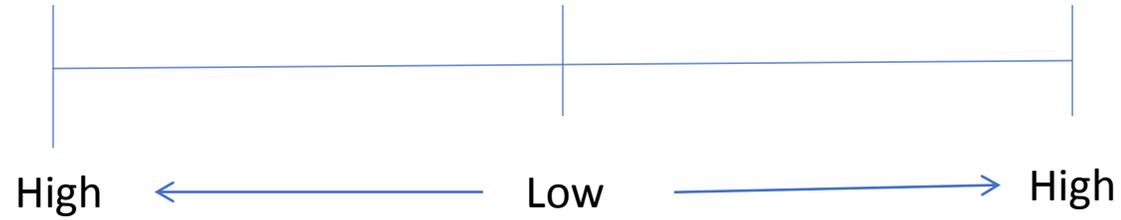
- Negotiation
- Mediation

**! Facilitation,  
Collaborative  
Problem Solving,  
and Consensus!**

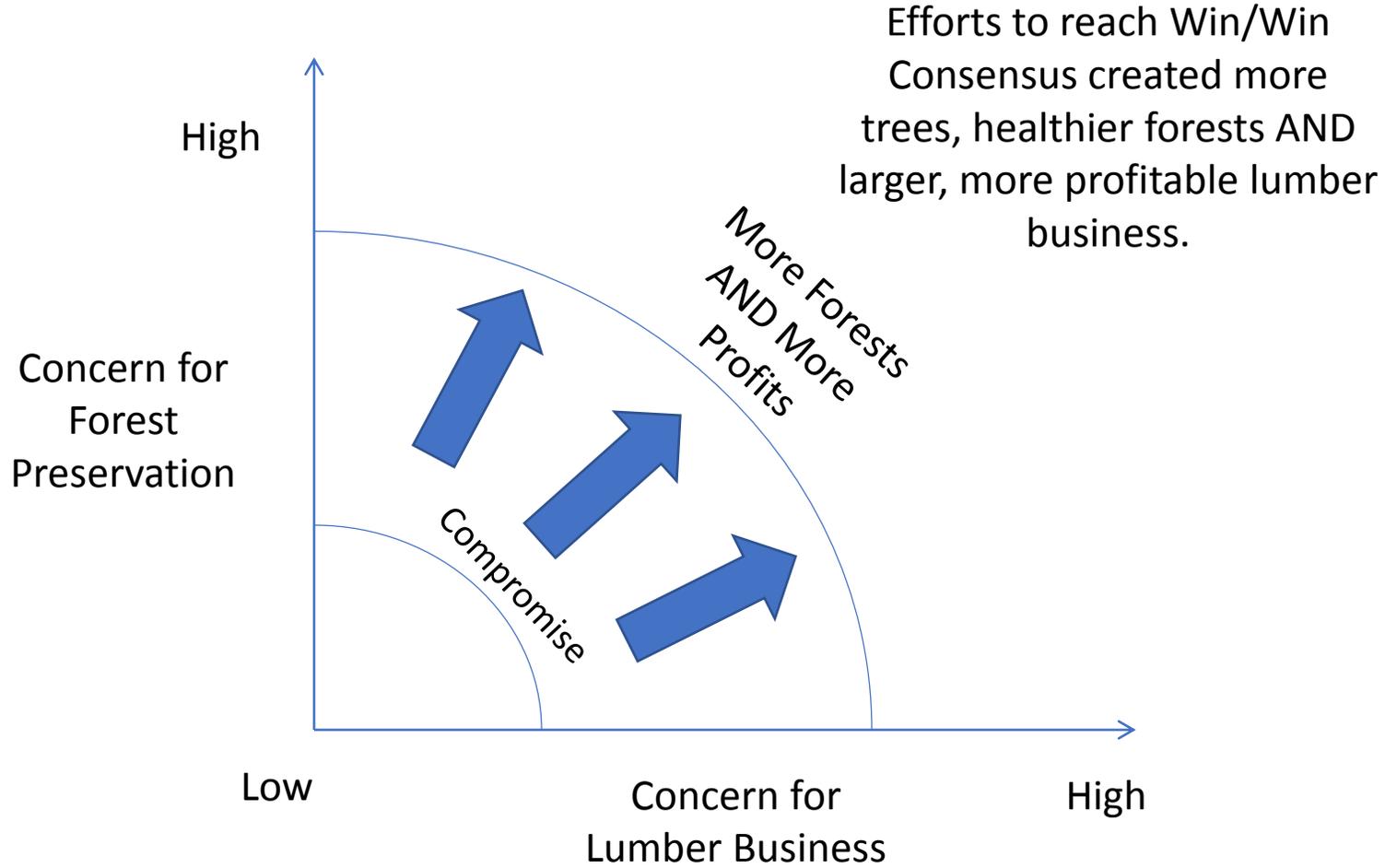
# Compromise

Concern for Forest  
Preservation

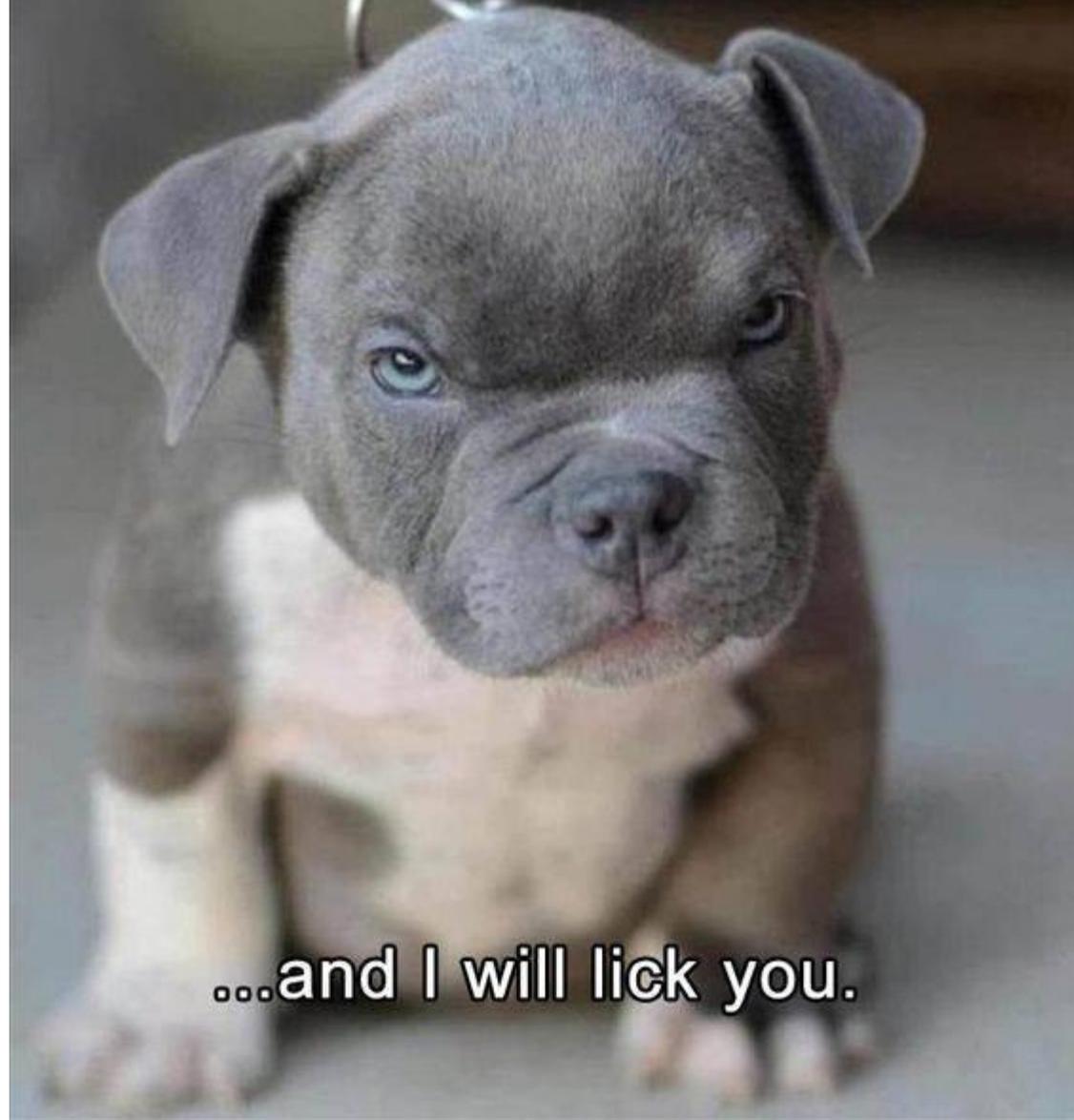
Concern for  
Lumber Business



# Win / Win Consensus



I will find you...



...and I will lick you.

## From June and July 2017, Planning for Building Renovation.

### Task:

Building task statements have 3 parts:

1. Employ a specific tactic. 2. ... so we can ... 3. Enable a general strategy.

Parts 1 and 3 need to be brief, seven words or less for each part. Part 2 stays the same, 3 words. (specific action **verb** phrase) ... so we can ... (values-based, mission-oriented action **verb** phrase).

### Examples:

-Build a larger kitchen ... so we can ... prepare meals to strengthen our community.

-Build 2 new restrooms ... so we can ... host large gatherings and provide respectful privacy.

Note: Use UU Principles for guidance for Part 3. If Part 3 does not advocate for one or more of the 7 UU Principles or it lacks mission focus, that lack of mission clarity argues against doing Part 1.

Task was sent to Congregation in June 2017.

Process: Send your top 3 suggestions for building task statements to Bruce Wood at woodbonriver@hotmail.com by Sunday, 16 July 2017. We will analyze building task statements anonymously, no names attached.

17 members submitted 41 responses from June 12 through July 16.

Congregational discussion took place during the Sunday worship service on 23 July 2017.

During the 20-minute sermon period of the service, Wood facilitated and recorded a discussion of the displayed categorized statements, creating a Group Memory on a projector screen.

We used questions like: “What might this behavior look like?” “How might we sequence these categorized steps?” “What characteristics of this task imply priority?” “What might make this statement more specific?” Note that these questions are also 7 words or less.

## **9 Samples from 41 Statements from Congregation:**

- Build a larger kitchen ... so we can ... prepare meals to strengthen our community.
- Fix roof leaks ... so we can ... make facilities serve missions long term.
- Add two bathrooms ... so we can ... make facilities serve missions long term.
- Repair the roof so we can avoid future major costs.
- Go through the Gilmer county water system so we can be sure our water is not contaminated.
- Install a dishwasher so we can eliminate bacteria on our dishes.
- Construct a ladies' washroom so we can have privacy, comfort, and welcoming decorative items.
- Repair the roof so we can have a building with structural integrity and no leaks.
- Create several office/classroom spaces on lower level of "R/E side" so we can ensure anyone with physical challenges can have complete access to facilities and programs.

## **Strategy A - Promote safety, health, and comfort.**

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**Outcome:** Fire extinguishers installed in both buildings according to code and common-sense safety concerns, finished immediately. Sequence: Done.

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**Outcome:** A patched roof that does not leak, finished ASAP. Sequence: Start now ... #1 of Phase 1.

### **Methods:**

Task 1: (Who?) will solicit assessments and estimates from 3 contractors by (when?).

Task 2: (Who?) will decide among the estimates and contract to effect the roof repairs by a completion date negotiated with the contractor, by (when to decide?).

Task 3: (Who?) will develop an alternative method plan to repair the roof using internal expertise and labor, and materials we procure ourselves, less expensively than hiring a contractor. Complete alternative plan by (when?)

**Resources:** Negotiate costs with contractor or as part of alternative plan.

## **Strategy A, continued:**

**Outcome:** Two restrooms in the NW corner of the RE side, one male, one female, both handicapped accessible, large enough to accommodate needs of large group events (100 people), both with baby changing stations, attractive, and allowing for privacy and dignity. Sequence: Start now ... #2 of Phase 1.

Implication: Accomplishing this outcome will result in eliminating the current restroom, since it will no longer be needed, and to allow for kitchen expansion.

Implication: Deciding not to include a shower is to decide not to provide sanctuary to a refugee or immigrant family or help to the aged or handicapped in a restroom emergency. (True?)

### Methods:

Task 1: (Who?) will consult with experts, internal and external, to further specify planning criteria, to include square feet of space required for each restroom, ventilation, heat and AC, number and type of toilet stalls, urinals, sinks, mirrors, hand drying machines or paper towel dispensers, and windows. Complete this consultation by (when?).

Tasks 2, 3, and 4 are the same as Tasks 1, 2, and 3 for the roof repair outcome above.

Resources: Negotiate costs with contractor or as part of alternative plan.

**Strategy A, continued:**

Open space and passage between RE and Sanctuary.

Move A/C wiring from warehouse meter to sanctuary meter.

Create several office/classroom spaces on lower level of "R/E side" with handicapped access.

Acquire a lapel mic for speakers.

**Strategy B** - Strengthen and grow community, expand programs, and welcome outside groups.

Tactics:

Build a larger kitchen. (3)

Open space and passage between RE and Sanctuary on both floors. (2)

Create spaces for meditation, small groups, coffee house, & library.

Tear out fireplace to expand worship/dining seating and enable kitchen re-modeling.

Make more parking spaces available on vacant lot and surrounding land. (3)

Paint lines on the parking lot.

Refresh and expand signage.

Create formal entranceway, with distinctive spire and UU symbol.

**Strategy C** - Reduce the mortgage payment and increase income.

Tactics:

Rent the warehouse building.

Move A/C wiring from warehouse meter to sanctuary meter.

Make safe the upper storage area in the back building.

Rent the RE side of our main building.

Sell the billboard lot.

**Strategy D** - Give facilities structural integrity to serve missions long term, avoid future costs, and raise property values. Tactics:

See Outcome Statement in Group Memory - Repair the roof. (2)

See Outcome Statement in Group memory - Add two bathrooms.

**Strategy E** - Become an example and promote green community.

Tactics: Install solar panels and other “green” improvements.



**For 2020.**

Propose a **task** to the congregation to begin the process of **involving the congregation immediately in strategic planning.**

Use a 3-part pattern like the task used in summer of 2017.

**Task: Write a 3-part statement that exemplifies a specific action the congregation can take to accomplish our mission and advocate for the 7 UU Principles (our Values).**

“We do this ... to show our commitment ... to UU Principle #\_\_\_\_. “

The “We do this...” part of the statements show **how** we do business. The “UU Principle” part of the statements show **why** we do business in that way.

**Write 2 statements.** One that describes an action MLUUC is currently taking. The other describes an action you personally recommend that we take in the future.

Send the statements to Wood by email or on paper by Sunday, FEB 16, 2020. Wood’s email: woodbonriver@hotmail.com.

**Next step 1:** After FEB 16, Stacey Day, Adrienne Corticelli, and Bruce Wood will organize and categorize the inputs from the congregation, using the respondents' own words, to identify trends that the congregation can use to clarify the starting points and priorities for strategy. Anyone else may volunteer to help with this part of the process as well.

**Next step 2:** Clarify when and how we want Wood to report the task statement results to the congregation and use those results to involve the Congregation in future collaborative planning steps.

Target date for the Congregation's first large-group meeting: Sunday, March 8, 2020, at 12:00, after the worship service and in place of the monthly Board meeting.

