



# From Member To Movement, Defining And Living Our Faith

Our Vision for the Future of Pacific Unitarian Church

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Just as the winged energy of delight  
carried you over many chasms early on,  
now raise the daringly imagined arch  
holding up the astonishing bridges.

Miracle doesn't lie only in the amazing  
living through and defeat of danger;  
miracles become miracles in the clear  
achievement that is earned.

To work with things is not hubris  
when building the association beyond words;  
denser and denser the pattern becomes  
being carried along is not enough.

Take your well-disciplined strengths  
and stretch them between two opposing poles.  
Because inside human beings  
is where God learns.

– Rainer Marie Rilke (1924)  
translated by Robert Bly

## Forward

Two years ago, the Board of Trustees chartered a Strategic Planning Team and tasked it to articulate a vision for the future of Pacific Unitarian Church. The first phase of this work was completed at the end of the last church year, when the congregation adopted a new Vision Statement, and the board accepted our report proposing the establishment of a permanent Strategic Planning Team. This report documents the next phase of that work.

The path our work has led us in the last year is not one that was anticipated when we began discussing our strategic objectives. We were surprised to find our discussion returning again and again to the principles that underlie the Unitarian Universalist faith and our shared aspirations as a congregation when the nominal subject of discussion was the practical challenge of funding, managing or housing the operations of a growing church. We eventually made a conscious choice to re-center our deliberations around the more conceptual issue of “who we aspire to be” as Unitarian Universalists. When we eventually returned to operational questions, it was with a different and, we believe, more mature perspective.

Throughout this report, we attempt to recognize the historic past and present strengths of Pacific Unitarian Church. At the same time, it has been our responsibility to ask what it means for us to be a Unitarian Universalist community in our place and time. What is our identity as a congregation? What responsibilities does our church have to its members, to the surrounding community and to the Unitarian Universalist movement as a whole? What strengths can we rely on to meet evolving challenges? What institutional limitations may slow or even thwart our progress? When can we compromise without sacrificing our core values and at what point does compromise begin to erode those values?

These are complex questions without simple solutions, and sometimes the answers may not be what we had hoped for or expected. Yet we believe that this inquiry is the only path by which we can determine our future as a church.

Our future is yet to be written, but we hold the pen in our hand.

June 5, 2011

Yours in faith,

Pacific Unitarian Church Strategic Planning Team

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## Introduction

Three years ago, Pacific Unitarian Church was named a “Breakthrough Congregation” by the Unitarian Universalist Association. We were honored among congregations of similar size for a number of our recent successes, such as the creation of an Addictions and Recovery Ministry, adoption of a Pastoral Care program, and the critical financial support given to the New Orleans Unitarian Universalist community as it struggled to recover from the devastation of the floods that followed Hurricane Katrina.

Our legacy of achievements stretches back decades before we were honored by the UUA, but our history is not an unbroken series of successes. We also experienced decline and decay, financial turmoil, internal conflict and discord. Yet we share an optimistic certainty that at any moment – even in our most troubled times – we have the potential realize our most ambitious goals. Thus, were there one primary recommendation to serve as the cornerstone of this report, it would be as follows:

### **For Pacific Unitarian Church To Strive At All Times To Be A “Breakthrough Congregation”**

This Strategic Plan is “aspirational” in its focus, not “operational.” It does not offer a set of concrete solutions to practical challenges or attempt to articulate the means to accomplish any defined operational end. Instead, the strategic planning process has represented an opportunity for us to consider our aspirations as a congregation and embrace the call toward a higher purpose rooted in the fundamental principles of a common faith.

Our discussion of the future of Pacific Unitarian Church begins with its status as a church, as the spiritual home of its members. The primary strategic objective of our church, we propose, is to challenge each of its members to discover and articulate his or her own personal faith.

We see our next priority as the maintenance of a self-supporting and self-sustaining congregation that can serve as the common spiritual home for, and meet the varied ministerial needs of its many members.

In addition to serving our own needs, we also set the priority of reaching out into our surrounding community in order to fulfill our promise as a beacon of liberal religion and a catalyst for positive social, economic and environmental justice throughout the South Bay. Finally, we suggest that our true potential as a religious institution can be reached only when we move beyond our local community and embrace our position within the Unitarian Universalist movement as a whole.

In the first section of this report, we will propose a set of aspirations for each of four levels: member, congregation, community and movement. These aspirations comprise the “ends” of this Strategic Plan. Although analyzed separately, we do not consider these four value

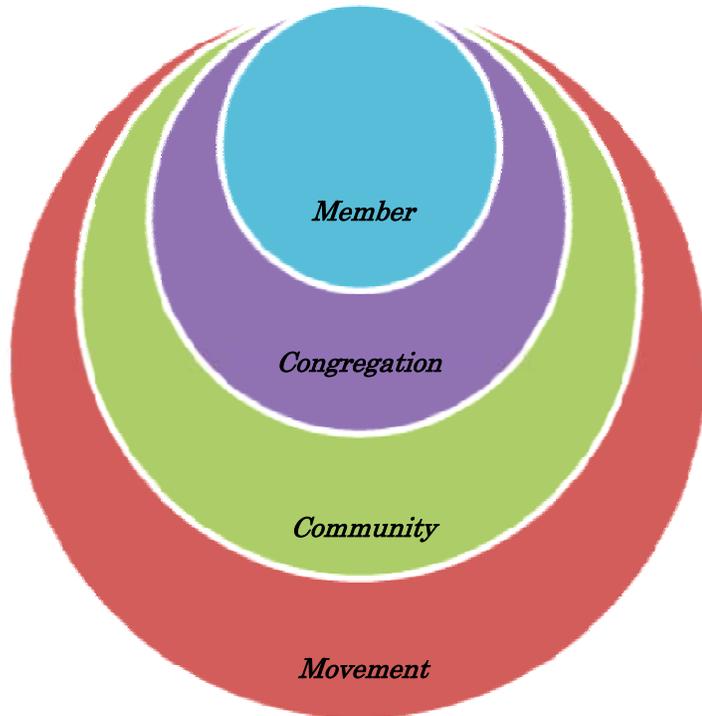
sets to be independent or even hierarchical; to the contrary, they co-exist as part of an inter-dependent whole in which each set of aspirations is shaped by, and in turn shapes, the others. Four nested circles is the symbol we have used to articulate this relationship:

***The Nested Circles***

*This intentionally poetic image is the emotional touchstone for the ideas contained in this report.*

*Archetypically feminine, the nested circles define a relational order that is at once inclusive and nurturing. The symbol echoes such visual cues as ripples on the surface of water and the chalice. Embedded in the heart of the symbol are the initials “UU.”*

*The point at which all of the domains touch represents a unity that, as we say at the conclusion of our Sunday service, binds us together in spite of time and death and the space between the stars.*



While any strategic plan must eventually translate into action, we consider the practical choices of how to move Pacific Unitarian Church forward to live into the values that define our shared identity. That shared identity, in turn, can keep us united even as we make difficult choices that could otherwise divide us.

Our framework for action begins with an assessment of the challenges that stand between us and our aspirations, as well as the assets we can draw upon to meet those challenges. In this second section of the report, we will consider both, with a specific emphasis on the challenges and strengths posed by our facilities and location.

Finally, we will propose a process to study each of the agreed-upon ends, operational alternatives considered and debated, and formal “means” adopted by the Board of Trustees or membership of Pacific Unitarian Church, as appropriate.

The Strategic Planning Team envisions a number of possible futures for Pacific Unitarian Church, each attainable and each dramatically different. However, we also recognize that it is the responsibility of the congregation as a whole to make this choice.

## Section 1

### Our Aspirations As A Breakthrough Congregation

*Pacific Unitarian Church is an inclusive liberal religious community and a Welcoming Congregation. We are committed to valuing people and encouraging their spiritual, ethical and intellectual development. We welcome and accept people regardless of race, age, socio-economic status, political affiliation, sexual orientation, disability or religious beliefs. We are committed to putting our Unitarian Universalist principles into practice.*

*Pacific Unitarian Church Mission Statement*

### Our Members

Seven core principles stand at the center of the Unitarian Universalist faith. Because they comprise our denomination's spiritual values, it is natural that they should form the core of the values that we embrace as a congregation.

The fourth Unitarian Universalist principle, the one that stands at center of the seven UU principles, is the goal of affirming and promoting the free and responsible search for truth and meaning. Consistent with this principle, we propose that Pacific Unitarian Church aspire to...

- Sustain an active worship life that challenges and engages each member,
- Create a vibrant adult religious education program,
- Encourage small group ministries and covenant groups, and
- Offer opportunities for spiritual growth through service within the congregation, community and Unitarian Universalist movement.

### Our Congregation

Each member travels a unique path leading to the doors of Pacific Unitarian Church. For some, our church represents the end point of long journey of personal spiritual discovery. Most, however, seek our church for different reasons. Some have needed solace in a time of strife or comfort in a time of grief. Others have found us not for their own benefit, but for the religious education of their children. Still others may be here to savor the comfort and company of like-minded peers.

Our aspirations as a congregation encompass two distinct objectives. First is the imperative of offering ministries to serve the needs of church members. Second is the need to be a self-sustaining and self-supporting institution with appropriate facilities, staff and resources to support its broader mission.

In its ministries, we propose that Pacific Unitarian Church aspire to...

- Serve all members in their times of deepest need with compassion and respect,
- Provide our minister and staff with the time and resources needed to ensure the success of our many ministries,
- Encourage active lay participation in all ministries,
- Support programs that in turn support our ministries, including lifespan religious education, addictions and recovery, and pastoral care, and
- Promote radical hospitality and harmonious relations between all members.

As an institution, we propose that Pacific Unitarian Church aspire to...

- Provide a well-maintained, safe and inviting facility that can comfortably accommodate all of our worship, teaching and administrative needs,
- Encourage all members to serve as stewards of the church by volunteering wherever and whenever their time and talents are needed (and not just when it is convenient),
- Support our lay leaders while also maintaining open and transparent governance,
- Provide transportation alternatives to those who wish to participate in congregational life but cannot because they lack access to transportation, and
- Achieve growth in numbers and give sufficient resources to support church operations, staff and programs.

## **Our Community**

Pacific Unitarian Church does not exist as an isolated, insular enclave separated from its Rancho Palos Verdes neighbors or the larger South Bay community. Social justice and community outreach are integral to the core principles of Unitarian Universalism and to our identity as a congregation. To solidify its presence within our local community, we propose that Pacific Unitarian Church aspire to...

- Open our ministries to the broader community,
- Make social, economic and environmental justice work a ministry in its own right, and
- Engage with local churches and community groups to support their outreach efforts, and invite them to participate in our social, economic and environmental justice work.

## **Our Movement**

Just as our congregation is part of a larger community, so too is it part of a larger religious movement. Unitarian Universalism as a faith asks us to respect “the inherent worth and dignity of all persons” and challenges us to move towards a new wholeness and embrace our

position within the “interdependent web of all existence.” Along the way, we are called to live into all of the values we affirm in our Seven Principles:

- Respect for the inherent worth and dignity of the individual;
- Justice, equity and compassion in human relations;
- Acceptance of one another and encouragement to spiritual growth in our congregations;
- A free and responsible search for truth and meaning;
- The right of conscience and the use of the democratic process within our congregations and in society at large;
- The goal of world community with peace, liberty, and justice for all;
- Respect for the Interdependent web of all existence of which we are a part.

Unitarian Universalism as a faith focuses on where we are going, not where we’ve been. As such, it calls for its members to move out into the world and to continuously (re)define themselves in light of new discoveries and insights, rather than by reference to some past revealed “truth” or dogma. As James Park explains beautifully in his piece “Why I Am a Unitarian Universalist“, we are a group of people who have largely moved from some other tradition to our current faith, and are focused on the future, not the past. This sense of movement and focus on what we can become – these traits will hold us in good stead as we address our shared future.

The greater movement also exists to support constituent congregations and to provide them with the depth and breadth of resources that only a much larger organization can offer. Absent financial support from the Unitarian Universalist Association, for example, we would not have been able to hire an intern minister this year. The Association also provides us with the opportunity to contribute to national and even international social justice work that would be beyond our means as a small group of well-meaning individuals. The “Standing on the Side of Love“ campaign and “Green Sanctuary“ activities are two important examples. Finally, as part of the Unitarian Universalist movement we participate in a vibrant intellectual debate concerning the vital issues of our times.

To discover our place within this larger movement, we recommend that Pacific Unitarian Church aspires to...

- Embrace Unitarian Universalism as the religion for our time and draw strength from our presence in the larger movement without losing our own unique identity.
- Appreciate the history of our faith tradition while also remaining attuned to new ideas and insights that can help us respond to the challenges of our time.
- Contribute to shaping the next generation of Unitarian Universalist ministers and leaders by remaining a teaching congregation.
- Evangelize by defining and living our faith.

## Section 2 Our Strengths, Our Challenges

*We envision Pacific Unitarian Church as a shining beacon of music, laughter and liberal religion in the South Bay. Guided by our principles we endeavor to achieve this by expanding our religious education to all, continuing to promote social and environmental justice in the world, growing our outreach to our diverse communities, and having fun.*

*Pacific Unitarian Church Visioning Statement*

Our identity as a congregation is not something fixed in time and space that can be discovered and mapped and marked with a flag. The shared aspirations that comprise our common identity are more like distant music, the source of which seems to grow ever closer without actually coming into sight. As we attune our ears to the music and let it guide our steps, we come to understand how it is the journey that defines us.

In this section, we ask how well prepared we are for that journey. We take an inventory of both our strengths and challenges in the present as we look toward the future. Our conclusion, simply put, is that we are prepared for a much more limited excursion than we feel we are capable of achieving.

### Our Members

Our members are our greatest strength. In recent years, we have enjoyed a significant increase in our numbers, which has in turn expanded our pledge base, provided a growing pool of volunteers and leaders to draw from, and enriched our congregational life.

Members of Pacific Unitarian Church share a covenantal relationship that implies certain responsibilities to each other for the benefit of the congregation. We normally frame this in terms of the “covenant of good relations” or a stewardship commitment in which we give of our “time, talent and treasure.” But our responsibility to the congregation cannot be quantified merely as an investment of time or talent or treasure, or satisfied when we do not yell at each other during congregational meetings. A covenant implies something more elemental and more profound, the nature of which has been explored in a sustained manner in our church.

Ultimately, crafting a plan for our future requires that we ask what we expect of our members. Consider the demands we place upon our leaders. We hold them to account for their actions and expect that they will strive to earn our trust. Is it not reasonable to hold our members accountable for some minimal level of participation in congregational life and engagement in congregational polity? Further, how successfully have we internalized the covenant of good relations? Recent conflicts at the leadership level inspired us to create a Harmonious Relations Team to encourage civility in our public discourse and to help resolve private conflicts. Yet, does our congregational culture tolerate or even enable incivility?

## **Our Governance**

Pacific Unitarian Church enjoys strong and engaged lay leadership, and has successfully introduced policy governance principles to decision-making. Its Board of Trustees and committees attempt to maintain transparency and a typical criticism is that we offer too much information to the congregation. Finally, we have taken significant steps forward in recognizing and empowering our volunteers. However, we lack a coherent, sustained leadership development and succession plan which is critical to long-term stability.

## **Our Staff**

We are truly blessed to have a dedicated and highly-competent professional staff. Our congregation's overall "quality of life" is daily enhanced by their work. However, we face an important crossroads as the Ehrhardt bequest funds used to finance the pastoral care position on our staff run out this year. Will we have sufficient financial resources to sustain staff at current levels? If we cannot, our Strategic Plan will have to assess whether we can fill roles once served by professional staff with volunteers, how this will impact the quality of our worship life and ministries at Pacific Unitarian Church, and whether we can realistically hope to achieve our congregational aspirations.

## **Our Facilities**

Although we are located in a beautiful location and we have a main hall with a storied history, it is difficult to consider our facilities to be equally strong as an asset. Consider the following:

- We lack adequate parking for Sunday services and congregational events.
- The main hall is routinely filled above a reasonable capacity during Sunday services and can no longer accommodate the entire congregation for events.
- We lack sufficient office space for the staff (all of whom share their office space), classroom space for religious education and general meeting space for our committees and church groups.
- We lack adequate kitchen facilities to handle our own needs or to meet the demands of our renters.
- Our facilities are aging and require substantial deferred maintenance.
- Use of our main hall for worship, meeting and rental needs accelerates wear and tear, which contributes to long-term maintenance costs.

These problems effect the congregation in many significant ways beyond the inconvenience and accessibility concerns of a long walk from a parking space on Montemalaga to the service. For example, overcrowding may detract from the worship experience and may make visitors and potential members uncomfortable, which negatively impacts our membership effort. Reliance on the hall for rental income means it is often unavailable for use by church members and makes it more difficult to schedule events for the benefit of the

congregation, such as memorial services, which damages congregational cohesion. Even if the funds to address the backlog of deferred maintenance issues were available, there remain the even more difficult challenges of accommodating office, classroom and meeting space needs of the growing congregation on a campus of limited size where any new construction will undoubtedly be expensive.

There is an additional layer of complexity when it comes to facilities questions because short-term decisions have long-term consequences. The point of a Strategic Plan is to consider a longer time horizon. For example, when considering our office needs we should ask not just what we need now, but what we may require in ten years. That inquiry, in turn, compels us to ask how large we expect to be, as well as predict the size of our staff and breadth of our services. No such choice could be made without determining whether we have the required economic resources and whether the investment will yield a reasonable return (where such return is measured by how well we would be furthering the aspirations set forth above).

We want the choices we make to address our problems to be meaningful. Because any strategy to tackle our facilities questions will require that we make decisions on how to allocate limited resources to address competing priorities, it is important to confront a foundational question: How do resource limitations impact the aspirations we choose to embrace as a congregation?

## **Our Location**

No one can deny the beauty and serenity of our location in Rancho Palos Verdes. It is amongst our greatest assets. Ironically, however, it may be a weakness that holds us back from reaching our true potential. Consider the following:

- We are not close to public transportation, which limits access to members and potential members without cars.
- Our location is difficult to reach at night and discourages many members and potential members from attending evening events.
- Our church is far removed from the areas most in need of the help from our social, economic and environmental justice work.
- We are not situated centrally within the geographic community we serve or the areas from which we draw new members.

Concerning the last point, at present only one third of our members reside on the hill and we are drawing new members predominately from the communities that surround the hill. This is a difficult issue that compels us to confront difficult questions. Does our location accurately reflect who we have become as a congregation? Is the population on the hill amenable to the values we proclaim? Does our distance from the community we serve limit our ability to promote social, economic and environmental justice in our local community? What does it mean to be the beacon on the hill? Is our congregational identity more tied to our location than a common faith? Does it matter where we gather to worship? Can a group within the church even pose these questions without drawing hostile accusations?

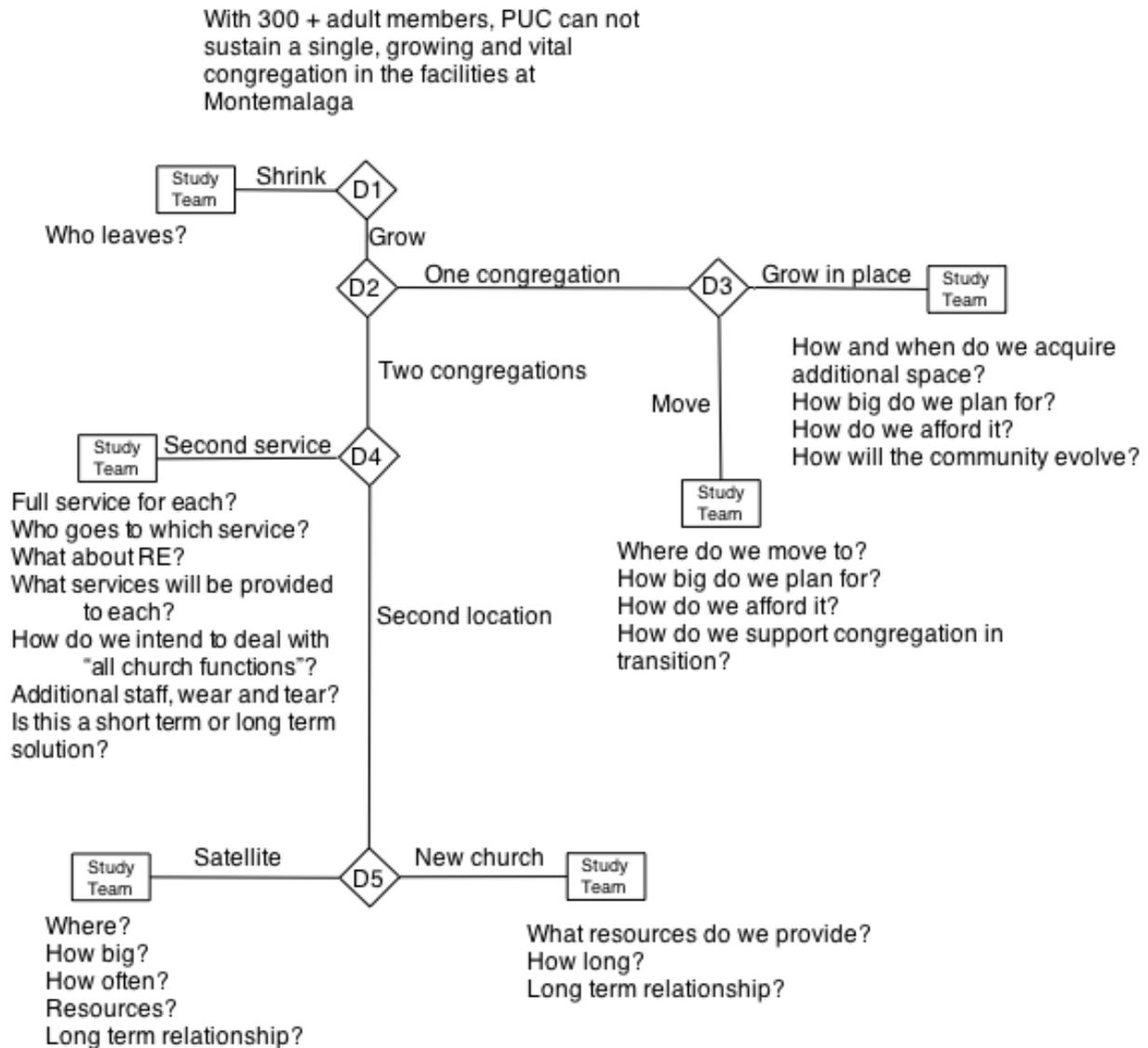
### **Section 3**

## **A Vision For Moving Forward**

[The Section is being prepared by the Strategic Planning Team in conjunction with the Board of Trustees. A draft has been prepared and we hope to be in a position to share this section with the Congregation after the Board retreat in August.]

## Section 4 Addressing the Challenges And Opportunities Of Growth

To help guide us through the process of making the important operational choices before us, the Strategic Planning Team has compiled a mass of data and other information, such as committee charters and goals that we can use as reference source. This material is included in the lengthy appendix to this report. In addition, we have prepared a suggested blueprint for the order in which we can approach major issues. The approach we advocate is to engage in a dialogue concerning narrow issues and to reach some form of consensus before moving on to the next issue in the logical sequence. This approach is based on a suggested “decision tree” that is set forth below.



**The Decision Tree** represents a means of engaging the entire Congregation in a focused strategic planning process. Much of its structure is determined by two separate conclusions of the Strategic Planning Team:

- (1) we lack the budget resources to support the staff, services and ministries that our Congregation expects and Community requires; and
- (2) we have grown beyond the reasonable capacity of our existing facilities.

We recognize that these conclusions are not necessarily recognized and appreciated by all of our members and friends. As such, some preliminary facts (more fully discussed in the various appendices and accessible online via the Strategic Planning Team website) provide an entry point for the Decision Tree.

With our membership roll well above 300 adults, we face significant space-related challenges:

- We lack sufficient parking, as well as office space and meeting and teaching rooms;
- There is insufficient room in the Great Hall or overflow space on the campus to accommodate the entire congregation at social events;
- We routinely fill the sanctuary during Sundays services;
- It is often difficult for church groups to find open meeting space;
- We are already over-programmed on weekends.

Such overcrowding creates problems. For example, lack of parking may discourage potential members from attending services and may make it more difficult for existing members to participate more fully in congregational life. Too many people in services may actively dissuade some visitors from returning because they may need relative anonymity before fully embracing congregational life. (Indeed, the UUA's rule of thumb is that a church is at overcapacity when it fills 80% of its seats.) Being squeezed into rooms too small or otherwise ill-suited for their needs can discourage our committees and other church groups. And all in our congregation suffer when we lack the flexibility to easily accommodate last-minute events such as memorial services.

Were the Congregation to accept the conclusion that we have reached about the capacity of our current facilities, we would face a decision, represented by the first diamond near the top of the Decision Tree: Decision 1 – Do we shrink (thereby reducing the pressure on our facilities) or do we embrace our size and explore solutions to our facilities needs? These represent dramatically different potential paths:

First, do we shrink? The Strategic Planning Team believes that simply ignoring the challenges created by our recent growth will result in a decision by default that leads inevitably to a smaller congregation. In other words, no matter what our short term momentum happens to be, in the long run we will gravitate to the size that can comfortably be accommodated in our space. In fact, we believe that Pacific Unitarian Church has almost certainly followed this path at least once, perhaps twice during our 50-plus year history at the Montemalaga location. Furthermore, we believe that even if we decide to shrink back down to a more comfortable size, we should make the decision intentionally

and strategically, for example by consciously deciding how we will shrink and how we will manage future growth. These are the issues that should be addressed by the Study Team represented in the top left rectangle.

Second, do we grow: The Strategic Planning Team believes that a decision to grow leads immediately to a second decision: Decision 2 – Do we want to grow as a single congregation or through a second congregation? Once again, we believe that either one of these decisions leads naturally to yet another decision. Addressing the “one congregation” path first, the question at hand is framed as follows: Decision 3 – Do we grow in place (e.g., do we somehow expand our current facilities) or do we move to a new location with more expansive facilities to support a larger congregation? The Strategic Planning Team believes that either of these decisions will need to be addressed by a Study Team tasked with addressing the kinds of questions called out beneath the “study team” rectangles. The alternative to “one congregation” leads to another decision: Decision 4 – Do we create a new congregation in place at our current facility (i.e., through a second service) or create a new congregation in a new location? After much discussion, the Strategic Planning Team concluded that creating a second service is effectively creating a second congregation. This assertion is supported by the extensive discontent expressed by many, perhaps most of the members and friends who experienced the two service options in the 2008 - 2009 and 2009 - 2010 church years. Therefore, we believe that two services properly belongs in the context of creating a new congregation, and that a Study Team should address the issues shown, including:

- How would each of the two congregations be configured?
- What services would be provided to each of the congregations?
- How would we address “all church functions” that would continue to exceed our parking and space constraints?
- How would we address youth religious education and social justice initiatives?
- How would we address increased wear and tear, and deferred maintenance needs?

Conversely, if we decide to encourage creation of a second congregation at a new location, then we face yet another decision: Decision 5 – Do we envision a “satellite” congregation, largely supported by our staff or do we envision a whole new church in a new location, perhaps seeded with a small group of our current members and supported financially to some degree until the new church is financially independent? Once again, either option should be considered in some depth by a Study Team.

## **Section 5 Conclusion**

While we have difficult choices before us, those choices represent opportunities for us to define ourselves, to come together as a congregation and to explore our collective religious identity. How we navigate those choices, as much as the end choices themselves, will test us and define us. This process is our next breakthrough and our legacy to future generations of Pacific Unitarian Church.

We may stand at a crossroads. But we stand together, bound in common purpose, resolute in faith, and prepared to take responsibility for our future.