

First Universalist Society of
Salem
Strategic Plan
March 2009

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A Word About Our Future From Rev. Marjorie Matty

The process of Strategic Planning can be an amazing opportunity for us, the members of the First Universalist Society of Salem, to look at how we work together to create and maintain a spiritual/religious community. It is a strenuous practice that requires insight and foresight as well as the time and dedication to share and listen to our individual and collective thoughts and ideas.

This document is the product of endless collaboration and meetings where we endeavored to come to a consensus on how we want to envision our spiritual community over the next five years and beyond. It is a living document, which means we will be working with it and referring to it when we make decisions about purchases, plans and budgets. A living document is not set in stone, but evolves and changes as our community grows.

There are some precepts that should be the basis for every decision that we make at First Universalist over the next five years that may not be spelled out explicitly within each individual section of this strategic plan, but should be considered in everything that we do. First, we want to grow in membership and abundance. Hence, every decision we make, meeting we attend, or task we do should take into account how a visitor might be engaged and/or feel about what we are discussing and/or experiencing. Second, we honor diversity of belief and being. Hence, let us think and take action for the greatest good while being mindful of the implications and ramifications on the minority; at all costs, seeking consensus should be our goal. Lastly, we value our families, many of whom are blended, with this in mind let us take into account the welfare of these families, specifically the children, and make sure that we are mindful of their needs and look to help create a safe, healthy and hopeful community for all who attend regardless of age, gender, race, sexual orientation and belief.

May this plan help us to create the community that we have so faithfully envisioned.

In service,

Rev. Marjorie J. Matty

The Process

Strategic Planning Team: Bill Smith (co-chair), Mark Stevens (co-chair), Marjorie Matty (advisor), Brenda Brianna, Agnes Buchanan, Helen Jacoby, Chris Makary, Andrea Ogles, Carla Smith, Ann Wickberg, and Calvin Young.

The process of developing a Strategic Plan started in January 2008. The group above met and agreed to help create a plan that would make it possible for us to grow and to thrive. Our first task was to organize a potluck dinner for the Planning Team and members of the Board. We met, along with our consultant from the UUA, Barry Finkelstein, at Nina Cohen's house in March 2008. After introducing ourselves, we discussed the steps to creating a plan and left with a sense of enthusiasm and determination.

Our next task was to seek input from the congregation. In April 2008, we hosted, with the help of Barry Finkelstein, an assessment weekend. This included an assessment visit from our consultant and workshops for our Church members. The purposes of the weekend were to describe our Church accurately, and to identify or strengths and the challenges ahead. Member turnout was great, and the meetings generated much impassioned discussion and positive community spirit. The priorities that emerged from our April meeting were tabulated and condensed by Helen Jacoby. These were distributed to the members of the Planning Committee, and they served as a guide for creating our Strategic Plan.

This fall (2009), again with Barry's help, we completed a "Searching for the Future" weekend. Although turnout was somewhat disappointing, we had eager, involved participation. The tangible result of that effort was to collectively produce a new Mission Statement for the Church. Here it is:

WE ARE A VIBRANT, LOVING CHURCH COMMUNITY ROOTED IN A TRADITION OF LIBERAL RELIGIOUS THOUGHT.

WE COME TOGETHER FROM MANY RELIGIOUS TRADITIONS, SEEKING SPIRITUAL AND PERSONAL TRUTHS.

WE LIVE OUR FAITH AND UNITARIAN UNIVERSALIST PURPOSES AND PRINCIPLES BY WORKING FOR SOCIAL JUSTICE AND BY ACTIVELY ENGAGING IN WORSHIP, SERVICE AND EDUCATION.¹¹

Armed with the insights, opinions and realities that emerged from our congregational meetings, the Planning Team then agreed to produce a plan by March 2009. This document is the result.

To help insure that this plan is implemented throughout the church year, we propose that the Board request **updates** from each area (Financial, House, RE, etc.) of the church twice during the church year –in **October and in April**.

Thanks to all who participated, opined, hosted, met and showed their concern for and commitment to the future of our Church.

The Plan

General themes: Our Church's goals and challenges were clear by the time we completed our many meetings and discussions. They included the following points:

- ❖ We would like the Church to grow in membership.
- ❖ We value our social outreach efforts, most notably service to the pantry and the Salem Mission. We would like to grow in these kinds of efforts.
- ❖ We are determined to develop a sound, growing RE program.
- ❖ We are determined to reduce our reliance on our endowment to a sustainable level.
- ❖ Our congregation loves music and wants it to continue to be an enriching part of Church life and worship.
- ❖ We love our sanctuary and want to take good care of it.
- ❖ We wish to grow in mind and spirit

Areas to be addressed in our plan:

- ❖ Religious Education – children, youth and adults
- ❖ Building
- ❖ Membership/Growth
- ❖ Service/outreach
- ❖ Finances
- ❖ Worship
- ❖ Music
- ❖ Leadership/ Governance

Plan format: For each area of the Church we will start with a short description of our program, as it currently exists. This may be followed with a general statement of where we would like to be five years from now. Then we will present a series of measurable goals, stated in greatest detail for the first two or three years of our plan. Since what is presented here is just the first iteration of a living, evolving document, we expect subsequent years to be “fleshed out” and modified as our future unfolds.

****** LEADERSHIP and ADMINISTRATION ******
STRATEGIC PLAN

Over the next five years, our goal is to create a strong and communicative Board that will lead the Church and help facilitate the mission of the Church.

Current program

The Board of Trustees has four members, one chair who coordinates the agenda with the minister and facilitates the meetings, one clerk who manages the meeting notes and coordinates the annual meeting with the moderator, and one treasurer.

The Board:

- Meets on a monthly basis;
- Members report on their areas of oversight;
- Presides at the annual meeting and any other special meetings.

Measurable goals

2009-2010 measurable goals:

- To be developed and distributed as soon as available.

*****FINANCES*****

STRATEGIC PLAN

General statement

We are committed to finding ways to become a thriving, more responsible, and responsive religious community. However, we currently draw about \$135,000 a year from the endowment for operating expenses. This is neither responsible nor can we indefinitely sustain this level of spending. Ideally, we should raise at least 80% of our operating income from member contributions, rental income, and fundraising, with 20% or less coming from permanent funds. In our short-term and longer-term strategic plan, we hope to increase income from these three sources so that we can keep the programs that we currently offer and continue to expand them and others to meet needs of our growing congregation. We wish to reverse the trend of unsustainable spending of our endowment's principal to which we have become accustomed while continuing to create a community of abundance.

Current program

As a congregation, we've identified our priorities and have begun a planning process that provides a clear and focused framework for moving forward with renewed spirit, energy and optimism. Current members see us as a growing congregation. To attain our goals, individual pledges need to go up, membership has to go up, and dependence on endowment has to go down. Income from other sources also must increase. The plan we're developing now will guide us to this goal.

We have developed a proposed budget for the next five years (attached). The average annual pledge in UUA households in the U.S. is \$1,800. We are well below that number. (Ours is \$727.) We are recommending a 10% annual average pledge increase per household. This translates into approximately between 3% and 5% of each member's annual income. We may not reach these numbers, but we wish to make incremental steps toward this goal, with all members invested personally in the stewardship of our congregation.

Measurable goals

2009-2011 measurable goals

- Immediately begin the incremental process of slowing and decreasing our dependence on the endowment at the rate of at least 1% per year.
- During this year's canvass, ask members to commit to incremental increases in their annual pledges.
- Make canvass a year-round process, with regular committee meetings.
- Be more open about our financial situation. Find more effective ways of communicating about the future of our Society, including frank discussions about money and other possibly contentious topics (cutting expenses) in a way that strengthens community.
- Make smarter uses of our volunteers. Redirect energy toward higher income-generating projects. For example, we get receive \$5,000 in rental income from Symphony-By-The-Sea, but it's a lot of volunteer work. The craft fair uses many volunteer hours and the return on investment is not significant. Use our "people power" more effectively.

- Hire a UUA expert to help us create a fundraising strategy. (September 2009 or January 2010)
- Explore possible sources of increased income: increase charges for parking, increase charge for building rental (including wedding rental), increase number of rental possibilities, take advantage of grants (Marjorie is working on Woburn fund for R.E. grant, for example), put in place an active planned giving program so we can continue to grow the permanent funds.

2010-2015 measurable goals

- Continue the multi-year effort to strengthen stewardship and financial commitment among members.
- Continually decrease the dependence on the endowment and find ways of growing ourselves out of this dependence by generating income in a number of ways.
- Continue to expand our presence in virtual world. Web presence brings more people to our Church and increases overall interest.
- Adjust plan as necessary. Keep goals realistic. Review plan each year and revise based on circumstances. Keep eye on prize of increased pledges, more members, and decreased dependence on endowment.

Key Assumptions

- 114 members by 2016
- At least 1% annual decrease in endowment withdrawals
- Salaries and committee expenses (and other expenses) will increase
- Household pledge units increase 10% per year
- Income from rental/parking to increase substantially in 5 years (from \$11,700 to \$19,144)

*****MEMBERSHIP*****
STRATEGIC PLAN

Current program

This year, the membership committee consists of four members. Currently, they carry out the following regular activities:

- Host three to four pot luck movie and game nights each year.
- Host two “Paths to Membership” classes with Rev. Matty.
- Greet new visitors; introduce them to Church and its activities.
- Write profiles of new members for the newsletter.
- With Rosa, Church administrator, add new members to the Church Directory.
- Conduct a “new membership” welcoming service each year.

Five years out

Assist with the overall Church goal of increasing membership by greeting, engaging, tracking and following up with each visitor. In five years, we would like to have grown by forty-three members (after allowing for attrition). To that end, we see a need for a part-time membership coordinator to increase the percentage of visitors who go on to become members. We would like to continue to develop fresh, engaging social events for our members and continue to host the events that members now enjoy and support.

Measurable goals

2009-2010 measurable goals

- Improve the location of sign-up sheets (away from the trash barrel).
- Meet regularly throughout the year.
- Welcome 15-20 new members.
- Minister to make personal contact with interested visitors.
- Create teams of greeters to serve one month each – greet people, introduce to others, discuss areas of interest, etc.
- Create a brochure that explains committee and volunteer opportunities within the Church.
- Create a “marketing task force” separate from the membership committee to increase visibility of our Church.

2010-2011 measurable goals

- Fund a part-time membership coordinator.
- Meet regularly throughout the year.
- Minister to make personal contact with interested visitors.
- Welcome 15-20 new members to the Church.

*****WORSHIP*****
STRATEGIC PLAN

Current program

There is one worship service held on Sunday at 10:45am. The Sunday service is led by one minister/speaker (Rev. Marjorie Matty), a deacon who assists in the liturgy and one member of the Board of Trustees who facilitates announcements. The order of worship is produced by the Church Administrator and is distributed by two ushers who welcome visitors and collect the offering.

Five years out

Provide worship that is inclusive and meaningful for all.

Toward this goal we will provide a variety of types of services and will recognize the differences from our regular services. We will put effort into making new visitors feel welcome and informed. In addition we will continue to grow our commitment to making our space accessible to everyone.

Through technology we intend to expand our viewing audience and make available through a variety of media, information such as sermons and event calendars.

The order of service will be evaluated and adjusted as needed with a vision toward what is the best flow for the service. We will update and expand the portion of the service our children participate in.

In order to help facilitate some of these thoughts as well as others we need to provide the Deacons with special training for lay ministry, care corps and prayer. Once they are trained we can expand said training to lay ministers.

To enhance spiritual growth and a sense of community, we will see what individual and group retreats are available for Church members, participate in a variety of social justice concerns and look for ways to invite First Church to join in some of the common interests and areas we hold, i.e., Maundy Thursday Service and the Salem Mission work.

We hope that with a variety of activities in which people can participate, we will grow our community in mind and spirit.

Measurable goals

2009-2010 measurable goals:

- Develop a Liturgical Calendar.
- Create worship that is spirit-filled and coordinated.

- Better organize the welcome at the beginning of worship.
- More opportunities for lay involvement in worship.
- Create tradition through rituals.
- Make all feel comfortable whether they are a first time visitor or a long time members.
- Reintroduce “greet your neighbor.”
- Having the congregation stand as the children leave the sanctuary as a show of honoring them.
- Religious Education portion of the service to include more storytelling and tableau – holiday participation

2010-2011 measurable goals:

- Provide worship that is inclusive of belief and difference.
- Engage a consultant to evaluate our strategy for welcoming visitors on Sunday.
- General Care Corps training for Deacons – Prayer and Lay Ministry with special training for learning how to pray with others.
- Bill Smith to make clipboard for the second Braille hymnal.
- Lent instead of Advent holiday services.
- Provide alternative worship.
- Include more people in prayer and make the process more communicative - Intercessory Prayer.
- Involve more people in care corps (pastoral care) in a variety of ways
- Offering will go to a social justice project (special or one-half)
- Participate in the UUA’s Association Sunday service
- Consider adding any of these adult RE programs: small group ministry, Evensong, Cakes for the Queen of Heaven, Building Your own Theology

2011-2012 measurable goals:

- Host spiritual speakers from other religions in a secondary worship service.
- Engage in spirit-filled rituals, led by members of the congregation who practice these beliefs.
- Begin general training for Lay Ministry – Prayer and Lay Ministry.

2013-2014 measurable goals:

- Incorporate a variety of retreats for worshipful experiences beyond the Church service.
- Services based on technology content delivery to the desktop/ iPod etc. Facebook – expansion of what we offer on Facebook
- Engage in worship with our Partner Church in the Philippines.

2015-2016 measurable goals:

- Continue to update the sound system – maintenance and upgrades as needed.

******MUSIC******
STRATEGIC PLAN

Current program

We are served by a part-time Music Director (Donna Murphy) as well as part-time Accompanist (Michael Mazurkiewicz). Our music committee has three members (Becky Christie, Brenda Briana and Helen Jacoby) and one Board liaison. Many members of the congregation sing or play special music on the weeks that the choir doesn't sing. We are fortunate to have a great Hutchings organ as well as a good piano.

Five years out

We imagine a Church that has grown in every way, including in its music program. Some of the ways in which we can see growth and change include: a well maintained and restored organ, a grand piano to replace our current upright, a youth choir, a bell choir, supported professional development for our music staff and an enlarged music staff.

Measurable goals

2009-2010 measurable goals

- Start a five-year program of organ repair and restoration
- Obtain a base (spyder) for moving the piano in the sanctuary
- Obtain covers for the grand piano and upright
- Begin to set aside funds for a grand piano
- Encourage more musical offerings by members of the congregation, including children
- Select music for Haunted Happenings event
- * Start a children's choir to work along with adult choir on occasion
- Identify an alternate accompanist
- Acquire more new supplemental hymnals
- Financially support organ lessons
- Add one special music event within the Sunday Service for the year (such as Matt Meyer, drummer, or a string quartet.
- Move upright piano to the library
- Provide financial support for area annual conference

2010-2011 measurable goals:

- Children's choir continues to work with adult choir on occasion
- Continue a five-year program of organ repair and restoration
- Hire a summer service accompanist
- Get a CD burner/ duplicator to augment the sound system
- Acquire more supplemental hymnals
- Add one special music event within the Sunday Service (such as Matt Meyer, drummer or a string quartet)
- Invite seasonal special choirs (Easter, for example)

2011-2012 measurable goals:

- Form a separate children's choir
- Continue the five-year program of organ repair and restoration
- Purchase smaller musical instruments such as shakers and drums to use as needs arise
- Add money to the budget for more sheet music
- Identify a place for storage of music supplies
- Add one special music event for the year (such as Matt Meyer, drummer or a string quartet)
- Add accompanist hours to reflect growth

2013-2014 measurable goals:

- Continue to support a separate children's choir
- Continue the five-year program of organ repair and restoration
- Add one special music event within the Sunday Service (such as Matt Meyer, drummer or a string quartet)
- Purchase additional hymnals to reflect ongoing growth

2015-2016 measurable goals:

- Continue to support a separate children's choir
- Continue the five-year program of organ repair and restoration
- Consider starting a bell choir (look into costs)
- Upgrade the sound system to stereo

****** RELIGIOUS EDUCATION ******
STRATEGIC PLAN

Over the next five years, the goal is to expand religious and spiritual activities for adults, young adults /youth, and children. A major concern is to retain children who participate in our spiritual programs beyond by developing programs for young adults/youth. Providing more spiritual activities for adults will help us build a stronger community.

Current program

The children's religious education program has 20 registered participants in two classes. There are 11 younger participants (**3-6**) and nine older participants in a second class (**7-13**). The children's RE program has been conducted in four two-month sessions and one one-month intersession. The RE program has/will conduct programs based upon the following themes for the regular two-month sessions:

- Beginnings;
- Social Action;
- Universalist History & Unitarian-Universalism Today;
- Creating Worship.

Denise Regan chairs the RE committee that works with the children of the Church. Each session has one teacher and a volunteer assistant for both classes. Currently, we have 11 teachers.

Adult religious education/spiritual program goal is to provide for spiritual growth of all members and friends of the congregation and to facilitate a more communal atmosphere. Presently, our program includes the following:

- Reverend Marjorie Matty conducts two three-session classes for new members.
- Donna Day conducts Pagan 101 and 102 classes for six participants.
- At their Imbolic invocation, the pagan group became a part of the Covenant of Unitarian- Universalist Pagans (CUUPS).
- Tom Wicker conducts a meditation class each Sunday prior to our regular service.

Five years out

Youth and children

- Monthly or bimonthly tween and teen social events (11+).
- Rites of passage: Bridging, Coming of Age.
- Hosting OWL Program –Our Whole Lives/Coming of Age Program for North Shore congregations.
- Curriculum development and teacher training.
- Add at least one to two more classrooms using library/adult RE for older youth program. New class age groups 3-5, 6-10, and 11+.
- Infrastructure improvements.
- Five or more member RE committee with a three-member curriculum review sub-committee.
- Increase youth participation in worship service.
- Youth choir.
- Pagan youth group.
- Review fiscal procedures – update if necessary.

Adult

- Members providing spiritual guidance
- Members serving as teen advisors
- Two or more CUUPS classes
- CUUPS and other spiritual activities
- Workshops on various world religions

Measurable goals

2008-2009 measurable goals:

- Develop at least one tween/teen social event before the end of the 2008-09 year.

2009 -2010 measurable goals:

- Develop at least 1 tween/teen social event before the end of the 2009-10 year.
- Develop five-member RE committee for 2009-10.
- Develop three-member sub-committee for 2009-10.
- Add three to five youth advisors to increase youth programming 2009-10.
- Review fiscal procedures in 2009.
- Trial of Spiral Scouts Pagan youth group (12 years and younger) for Spring of 2009.
- Continuing Spiral Scouts Pagan youth group.
- Conduct at least one spiritual pagan activity (including parents).
- Add third youth class.
- Develop three-member RE sub-committee for adult RE (Adult).
- Conduct spiritual parenting workshop. (Adult).

2010-2011 measurable goals:

- Increase teachers – add five additional teachers for each new classroom (teachers will rotate bimonthly).
- Increase volunteers – add one assistant each week for each classroom added
- Add five hours to RE director time.
- Complete research and coordination to develop Owl and Bridging Programs.
- Develop second adult pagan class (Adult - 13 years and older).
- Add a second teacher for the 13 years and older pagan class. (Adult)
- Conduct at least one spiritual pagan activity for adults. (Adult)

******OUTREACH******
STRATEGIC PLAN

Current program

There currently isn't a social justice committee nor is outreach a coordinated way of being at the Church, there are several projects that have been taken on by individual members such as the Salem Food Pantry and the outreach to the Salem Mission on a monthly basis.

Five years out

To have a functional committee that works to engage the congregation in doing the work of social justice in Salem and the larger world. The events that we engage with are member driven.

Measurable goals

2009-2010 measurable goals

- Work with ECCO to develop a strong and passionate leadership for social justice.
- Get a budget line for outreach to do things such as Boston Pride and purchase banners for the building
- Do an action for/against a specific issue.
- Do the parade for Haunted Happenings
- Fundraising events such as the HAWC Walk

2010-2015 measurable goals

- Note: Goals in this area will be developed during the coming church year.

****** BUILDING/FACILITIES ******
STRATEGIC PLAN

Current program

Sexton is working five hours/week year round, mostly responsible for cleaning only. **Brown/Lendell** is an endowment that provides \$15,000 each year for building maintenance, repairs and improvements. It is why we have a working furnace and a roof that doesn't leak.

House committee mostly undertakes small repairs and improvements and monitors the House budget as well as the Brown/Lendell funds. This year's budget is \$9,000.

Church administrator –Better known as Rosa, she takes care of countless ongoing jobs for the House Committee, everything from changing the furnace filters to dealing with blown fuses.

Five years out

- Renovated Dickson room, to include the hall leading to the Dickson Room as well as the transition area in front of the Adult RE room.
- A “greener,” more efficient building
- Continued development of building accessibility
- Greater use of our building as a rental space, especially for activities that are consistent with our mission
- New entrance to the Dickson room to include a sheltered entrance with and exterior door and the removal of the current “airlock doors.”
- Chairlift from sanctuary to Bolles Hall.
- Enlarge Anna Hill Room kitchen capacity

Measurable goals

2009-2010 measurable goals:

- Devise a plan that will put more heating zones in our building. Implement the above plan by December 1, 2009.
- Maintain the House Committee as a group of four? Plus one representative of the Board.
- Complete the last phase of our five-year roof improvement. This will involve replacing the rubber roof that covers the office hallway, bathroom and Anna Hill kitchen.
- Develop a list of people in the congregation who are willing to undertake projects for the Church but who do not necessarily want to be a regular member of the House Committee
- Make a portable ramp that could be used on Sundays to make Ash Street more accessible
- Examine the paneling in the Dickson Room with an eye towards developing a plan for removing it in the future.
- Support the cost of our Sexton's salary by using \$3,000 from the Brown/Lendell fund for each of the next three years.
- Allocate funds from the Brown/Lendell fund to pay for an evaluation of the potential dangers to our sanctuary of a crack that has appeared in the ceiling.
- Remove pew for accessibility

- Purchase and install a lock for the upright piano

2010-2011 measurable goals:

- Continue to contribute \$3,000 from the Brown/Lendell fund towards the Sexton salary.
- Add oscillating fans in the corner of the sanctuary
- Maintain the House Committee as a group of four, one of whom is a Board member
- Develop a plan to provide curtains or blinds for the Anna Hill room windows. If possible, provide them during this Church year
- Get a price for installing a chairlift from the main floor to Bolles Hall (project to be completed by year four)
- Improve heating in vestibule adjacent to the sanctuary (especially for use during Symphony by the Sea concerts)
- Set aside money from Brown/Lendell fund to pay for the services of an architect/planner who will help us develop plans for the Dickson Room. These should include the possibility of using this area as a day care center for Church members as well as others.

2011-2012 measurable goals:

- Improve lighting in the hallways adjacent to the sanctuary
- Fix stained glass window casing and trim

2012-2013 measurable goals:

- Add cushions to the balcony

ASSUMPTIONS**FIRST UNIVERSALIST SOCIETY OF SALEM**

		2009-10	2010-11	2011-12	2012-13	2014-15
Income and Giving						
Cash & Holiday		3%	3%	3%	3%	3%
Donations/Misc.		3%	3%	3%	3%	3%
Rental/Parking		5%	5%	5%	5%	5%
Flower/Donations		3%	3%	3%	3%	3%
Fundraising		5%	5%	5%	5%	5%
Pledges	\$43,623	\$52,784	\$63,868	\$77,281	\$93,510	\$113,147
Number of Members	71	78	86	95	104	114
Number of Pledge Units	60	66	73	80	88	97
Growth in Number of Pledge Units		10%	10%	10%	10%	10%
Growth in Giving in Pledge Units		10%	10%	10%	10%	10%
% of Pledges Budgeted	75%	75%	75%	75%	75%	75%
Average Pledge Unit	\$727	\$800	\$880	\$968	\$1,064	\$1,171
Barnes Fund/Guest Ministers		0.00%	0.00%	0.00%	0.00%	0.00%
Flowers		0.00%	0.00%	0.00%	0.00%	0.00%
Lyndel/Brown		0.00%	0.00%	0.00%	0.00%	0.00%
Investested Funds/General		-1.25%	-1.25%	-1.25%	-3.50%	-3.50%
Annual Dues - UUA	\$56	\$56	\$57	\$58	\$59	\$60
Annual Dues - MBD	\$19	\$19	\$20	\$21	\$22	\$23
Expenses						
Committee Expense Increase		3%	3%	3%	3%	3%
Salary Increase		4%	4%	4%	4%	4%

FIRST UNIVERSALIST SOCIETY OF SALEM

LONG RANGE PLAN

	Budget '08	Budget '09	2009-10 Budget	2010-11 Budget	2011-12 Budget	2012-13 Budget	2014-15 Budget
Income and Giving							
CURRENT FUNDS							
CASH & HOLIDAY	2,500.00	2,500.00	2,575.00	2,652.25	2,731.82	2,813.77	2,898.19
DONATIONS/MISC.	1,200.00	2,500.00	2,575.00	2,652.25	2,731.82	2,813.77	2,898.19
RENTAL/PARKING	11,700.00	15,000.00	15,750.00	16,537.50	17,364.38	18,232.59	19,144.22
FLOWER/DONATIONS	200.00	300.00	309.00	318.27	327.82	337.65	347.78
FUNDRAISING	1,721.00	3,100.00	3,255.00	3,417.75	3,588.64	3,768.07	3,956.47
PLEDGES	26,344.78	32,073.00	39,587.87	47,901.33	57,960.60	70,132.33	84,860.12
Total CURRENT FUNDS	43,665.78	55,473.00	64,051.87	73,479.35	84,705.07	98,098.19	114,104.97
INVESTMENTS							
BARNES FUND/GUEST MINISTERS	1,400.00	1,900.00	1,900.00	1,900.00	1,900.00	1,900.00	1,900.00
FLOWERS	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00	2,300.00
LYNDEL/BROWN	15,000.00	15,000.00	15,000.00	15,000.00	15,000.00	15,000.00	15,000.00
INVESTED FUNDS/GENERAL	122,509.65	135,850.70	134,152.57	132,475.66	130,819.71	126,241.02	121,822.59
Total INVESTMENTS	141,209.65	155,050.70	153,352.57	151,675.66	150,019.71	145,441.02	141,022.59
Total Income	184,875.43	210,523.70	217,404.44	225,155.00	234,724.78	243,539.21	255,127.56
Expenses							
COMMITTEE EXPENSE							
BOARD OF TRUSTEES	60.00	100.00	103.00	106.09	109.27	112.55	115.93
DEACONS/ GUEST MINISTERS	1,600.00	2,150.00	2,214.50	2,280.94	2,349.36	2,419.84	2,492.44
FINANCE	2,250.00	2,300.00	2,369.00	2,440.07	2,513.27	2,588.67	2,666.33
FLOWER	2,300.00	2,600.00	2,678.00	2,758.34	2,841.09	2,926.32	3,014.11
HOSPITALITY	150.00	150.00	154.50	159.14	163.91	168.83	173.89
HOUSE	6,800.00	9,000.00	9,270.00	9,548.10	9,834.54	10,129.58	10,433.47
CAPITAL REPAIRS	15,000.00	15,000.00	15,450.00	15,913.50	16,390.91	16,882.63	17,389.11
INSTALLATION	2,000.00	-	-	-	-	-	-
MEMBERSHIP/ADVERTISING	500.00	450.00	463.50	477.41	491.73	506.48	521.67
MUSIC							
Music	920.00	690.00	710.70	732.02	753.98	776.60	799.90
Instrument Tuning	670.00	700.00	721.00	742.63	764.91	787.86	811.49
RELIGIOUS EDUCATION							
Youth RE	650.00	755.00	777.65	800.98	825.01	849.76	875.25
Adult RE	200.00	270.00	278.10	286.44	295.04	303.89	313.00
STRATEGIC PLANNING	-	2,000.00	2,060.00	2,121.80	2,185.45	2,251.02	2,318.55
WELCOMING CHURCH	-	-	175.00	180.25	185.66	191.23	196.96
Total COMMITTEE EXPENSE	33,100.00	36,165.00	37,424.95	38,547.70	39,704.13	40,895.25	42,122.11
MINISTER							
BILL ROBINSON							
HOUSING - BR	2,200.00	-	-	-	-	-	-
INSURANCE - BR	1,959.00	-	-	-	-	-	-
PENSION - BR	884.00	-	-	-	-	-	-
Prof Expenses - BR	884.00	-	-	-	-	-	-
SALARY - BR	6,634.00	-	-	-	-	-	-
Total Bill Robinson	12,561.00	-	-	-	-	-	-
MARJORIE MATTY							
HOUSING - MM	23,520.12	23,520.00	24,460.80	25,439.23	26,456.80	27,515.07	28,615.68
INSURANCE - MM	6,697.60	8,040.00	8,361.60	8,696.06	9,043.91	9,405.66	9,781.89

FIRST UNIVERSALIST SOCIETY OF SALEM

LONG RANGE PLAN

	Budget '08	Budget '09	2009-10 Budget	2010-11 Budget	2011-12 Budget	2012-13 Budget	2014-15 Budget
PENSION - MM	5,330.00	5,543.00	5,764.72	5,995.31	6,235.12	6,484.53	6,743.91
Prof Expenses - MM	5,330.00	5,543.00	5,764.72	5,995.31	6,235.12	6,484.53	6,743.91
Moving Expense - MM	2,500.00	2,500.00	-	-	-	-	-
SALARY - MM	29,779.88	31,912.00	33,188.48	34,516.02	35,896.66	37,332.53	38,825.83
Total Marjorie Matty	73,157.60	77,058.00	77,540.32	80,641.93	83,867.61	87,222.31	90,711.21
Total MINISTER	85,718.60	77,058.00	77,540.32	80,641.93	83,867.61	87,222.31	90,711.21
OFFICE EXPENSE							
OFFICE SUPPLIES	3,120.00	1,200.00	1,236.00	1,273.08	1,311.27	1,350.61	1,391.13
POSTAGE	1,000.00	1,000.00	1,030.00	1,060.90	1,092.73	1,125.51	1,159.27
COPIER	-	1,640.00	1,689.20	1,739.88	1,792.07	1,845.83	1,901.21
Total OFFICE EXPENSE	4,120.00	3,840.00	3,955.20	4,073.86	4,196.07	4,321.95	4,451.61
OTHER EXPENSES							
ANNUAL DUES- UUA	2,322.00	3,808.00	4,373.60	4,896.87	5,481.06	6,133.11	6,860.77
ANNUAL DUES-MBD	731.00	1,292.00	1,483.90	1,718.20	1,984.52	2,286.92	2,629.96
MISCELLANEOUS	350.00	350.00	360.50	371.32	382.45	393.93	405.75
Total OTHER EXPENSES	3,403.00	5,450.00	6,218.00	6,986.39	7,848.03	8,813.97	9,896.48
STAFF EXPENSES & INSURANCE							
Payroll Expenses	985.00	1,184.00	1,219.52	1,256.11	1,293.79	1,332.60	1,372.58
Pension Non Minister	1,266.08	1,317.00	1,369.68	1,424.47	1,481.45	1,540.70	1,602.33
STAFF MEDICAL INS. 80%	4,126.00	7,183.00	7,470.32	7,769.13	8,079.90	8,403.09	8,739.22
DISCRETIONARY	200.00	200.00	208.00	214.24	220.67	227.29	234.11
FICA	5,553.21	7,668.00	7,974.72	8,293.71	8,625.46	8,970.48	9,329.29
INSURANCE/WORKERS COMP.	6,932.00	7,432.90	7,730.22	8,039.42	8,361.00	8,695.44	9,043.26
Total STAFF EXPENSES & INSURANCE	19,062.29	24,984.90	25,972.46	26,997.08	28,062.26	29,169.60	30,320.79
STAFF SALARIES & FEES							
ADMINISTRATIVE ASSISTANT	12,660.75	13,167.00	13,693.68	14,241.43	14,811.08	15,403.53	16,019.67
CHORAL DIRECTOR	5,000.00	5,200.00	5,408.00	5,624.32	5,849.29	6,083.26	6,326.60
ORGANIST	5,000.00	5,200.00	5,408.00	5,624.32	5,849.29	6,083.26	6,326.60
RELIGIOUS EDUCATION DIRECTOR	7,500.00	11,250.00	11,700.00	12,168.00	12,654.72	13,160.91	13,687.35
NURSERY ATTENDANT	880.00	998.00	1,037.92	1,079.44	1,122.61	1,167.52	1,214.22
SEXTON	1,500.00	6,000.00	6,240.00	6,489.60	6,749.18	7,019.15	7,299.92
Total STAFF SALARIES & FEES	32,540.75	41,815.00	43,487.60	45,227.10	47,036.19	48,917.64	50,874.34
UTILITIES EXPENSE							
alarm company	360.00	360.00	370.80	381.92	393.38	405.18	417.34
ELECTRIC	3,500.00	3,500.00	3,605.00	3,713.15	3,824.54	3,939.28	4,057.46
GAS	1,100.00	1,100.00	1,133.00	1,166.99	1,202.00	1,238.06	1,275.20
OIL	9,000.00	12,500.00	12,875.00	13,261.25	13,659.09	14,068.86	14,490.93
TELEPHONE	3,000.00	3,100.00	3,193.00	3,288.79	3,387.45	3,489.08	3,593.75
WATER	650.00	650.00	669.50	689.59	710.27	731.58	753.53
Total UTILITIES EXPENSE	17,610.00	21,210.00	21,846.30	22,501.69	23,176.74	23,872.04	24,588.20
Total Expense	195,554.64	210,522.90	216,444.83	224,975.74	233,891.03	243,212.77	252,964.75
Net Ordinary Income	(10,679.21)	0.80	959.61	179.26	833.75	326.44	2,162.81