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Strategic Planning for the Source of Light (SoL) Center of University Presbyterian Church

Deborah Brandt Buchler
University of the Incarnate Word

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University Presbyterian Church

Elizabeth McGregor Simmons, Pastor

July 11, 2002

To whom it may concern:

When Deb Buehler chose the SoL Center of University Presbyterian Church as the locus of her project work, I knew that the process through which she would lead the Board would be invaluable. Deb is a founding board member of the SoL Center which is an educational resource center offering tuition-based and free programs to the greater faith community of San Antonio. She had previously assisted the board of directors in formulating by-laws, so my expectations of her leadership and of the outcome of the retreat/process for developing a strategic plan for the Center were high. Deb's strong, confident leadership and the entire endeavor have surpassed even my extraordinarily high expectations.

Deb clearly outlined the steps of the process, eliciting suggestions and feedback from the membership of the board of directors. Keenly listening, gently prodding, making suggestions where appropriate--Deb led us through the process. When the retreat was completed, we had a sense of direction that we had not had before, I think. There was also a decision made to continue building on the process with subsequent meetings; Deb willingly agreed to provide leadership for these meetings, as well. These follow-up conversations have helped to clarify in concrete ways the good work that was done earlier.

We are grateful for the opportunity to be a partner in Deb's project. If you have any questions regarding this assessment, please do not hesitate to contact me.

Sincerely,



Lib McGregor Simmons

STRATEGIC PLANNING FOR THE
SOURCE OF LIGHT (SOL) CENTER OF UNIVERSITY PRESBYTERIAN CHURCH

A Pastoral Project
Presented to the Pastoral Institute,
University of the Incarnate Word, in partial
fulfillment of the requirements for
the degree of Master of Arts in
Religious Studies

by

Deborah Brandt Buehler, B.A.

Approved by:

A. Eirik Ryan
Faculty Advisor

Date: *August 1, 2002*

Over the course of my graduate work in the Pastoral Institute my understanding of church and ministry has changed significantly. These changes have been influenced by course readings, lectures, written assignments and interaction with diverse faculty and students. While a graduate student I have also had the opportunity to become increasingly involved in the life of University Presbyterian Church. This has significantly broadened and enriched my understanding of church and ministry. God has blessed me with rich and challenging opportunities for personal and professional growth as a student in the Pastoral Institute.

As a young person I had a limited understanding of church and ministry. Church was the place our family went once a week to worship God. While my family participated in the activities of the church community on Sundays the church did not seem to have weekday implications or applications. The God of my early church experience did not seem to be engaged by the community through interaction, intercession, or connection. Through the white male leadership of this community I did not gain a sense of belonging. The confirmation process was not one of reflection, celebration, or joyful education. I did not feel I was welcome in the church but rather should be seen and not heard.

Today's church is a dynamic and revelatory community. The church I have come to know through my pastoral institute studies is a richly diverse, sacred, energetic,

respectful, community. My growing understanding of church connects with the idea of Christ embodied in the believers in a very different way. The church embraces the human nature of a community with all its difference, cares and concerns, challenges, and need for relationship with one another. The church today is a vibrant community for disciples traveling along the way to know, love and serve Jesus Christ.

In the community of Jesus Christ, Christians have a model for the life of discipleship. This life is bounded by connection to one another. Christians are called by scripture to stay connected to the community for support, nurture, comfort, care, compassion for others and growth in Christ. The community is central to Jesus' message and ministry. The community is the central responsibility of Christian living in the twenty-first century.

Jesus modeled the life of the community during his ministry. The Jewish culture within which Jesus lived was bounded by those inside and outside of community. The woman at the well, the hemorrhaging women, tax collectors and lepers are among those whom Jesus invites back into community. Jesus sought to bring the excluded back into relationship with the larger community through physical, emotional and spiritual healing.

Today's church has an opportunity to seek healing practices to restore outsiders into the community. (The church has played its part in excluding people who are different. Many have deep woundedness as a result of their experiences with the church. Current events such as the debate in the Presbyterian Church over ordination of gays and lesbians or the issue of abuse committed by priests, demands our attention to cultivate healing strategies.) The church has a call for responsiveness in building community in

radically different ways. Jesus Christ was radical in his approaches to the issues of his day. Today's church must radically pursue change in support of healing in love.

Within the community are the diverse gifts of each individual. These gifts too represent God's grace alive and held up in each person. Valuing, respecting, rejoicing and embracing the individual enhances the community. Not just a place of worship the community has a much greater potential for becoming a place of nurture, healing, blessing, gift, clarity, support, love and sacrament. Each community supports the needs of the individuals through God's mystery! In his book Introducing the Reformed Faith: Biblical Revelation, Christian Tradition, Contemporary Significance, D.K. McKim states "The Christian life is a communal life. It is lived in fellowship with others who have confessed faith in Jesus Christ as their Lord and Savior and have been drawn together by the Holy Spirit in the Church." (128)

The community then is the sacramental mystery of God lived out in faith with Jesus Christ. Individuals living in relationship with God are a blessing to the community. The community in interactive dialogue with the Trinity is a blessing to the individuals. Through the intimacy of relationship with God, the community can be open to the mysterious leading of God's grace in the new covenant through Jesus Christ.

Each person brings glory to the community through simple presence. At the same time each person brings to bear gifts, talents, skills as led by the Spirit. Individuals make up the body of Christ lived out in the action of the community. In each of her or his gifts the individual becomes an active minister in the life of the church. Here the community is as dynamic and as rich as its individual members are. From voices joined in worshipful

singing to hands joined in building a ramp, community members contribute to the ministry of the church. God's grace is played out in the decisions of each member of the community. Connected and bound by the resurrection of Jesus Christ each person is moved to involvement in the life of the church.

What does it mean to be a minister? From my earliest experience I thought the minister was a white male, leading, making decisions and setting expectations about the members of the community. This image was often judgmental, punitive, critical and harsh. The ministers of my youth often described God to me with these same characteristics. I did not understand God as loving, merciful, gracious, kind, or passionate. I did not understand myself as a beloved child of God.

Ministry is much more dynamic than the experiences of my youth. Today I see that every community member is called into the participative ministry of the community as a whole. Each woman, man, child, family, individual, neighbor, and friend brings something to the ministry within the community. Again, individual gifts and talents contributed to the community create opportunities for God's love in action.

Ministry is evidenced in the loving nurture of the individual and community. Ministry can be the gifts of corporate and individual prayer, community learning, action, material gifts and the loving grace played out in the community. Ministry can be the meals taken to a shut in, the gift of music played during worship, the experience of a shared moment in a class, the wild and precious baby at baptism. The lives of each individual member of the community become the ministry as Christians seek to live their faith in the daily traumas of difficult times. Ministry can be inexplicable in that it

touches someone deeply--right where they need to be touched at that moment. Ministry is the mystery of God played out in diversity of human expression. It is each person living in her or his best gifts and using those gifts to express the glory of God.

Works Consulted

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Submit a brief description of the project you propose:

University Presbyterian Church has recently developed an adult education program called The SoL (Source of Light) Center. In operation for nearly a year, the SoL Center is a faith-based education center for adults, who seek to explore the full dimensions of Christian life in the 21st century. A dynamic board of directors representing diverse theological and religious backgrounds has supported the SoL Center. These individuals have provided the leadership for the first year of operations.

For my pastoral project, I will utilize my organizational development coursework in combination with the Pastoral Institute study to facilitate the development of by-laws under which the SoL Center can operate. I would also like to facilitate the development of a strategic plan addressing goals, organizational objectives and strategies for accomplishing these goals. Working closely with the board of directors (as the focus group) and the operating committees these goals and strategies will support the direction of the SoL Center and its staff. Benchmarks will be identified to support SoL Center decision-making including programming, funding, resource development, volunteer management, and marketing. Staff and volunteer needs will be identified as will strategies to meet these needs. The final outcome will include a written strategic plan, which the SoL Center will use as a guideline for operation.

An evaluation will be utilized to measure the impact of the strategic planning retreat. Additional assessment will occur as the strategic plan is implemented.

Project Proposal

1. *Describe the pastoral setting in which this project will be implemented. What makes this community/group particularly appropriate for this project? How will you use these strengths to enhance your project? What are the obstacles you anticipate you will face? How do you intend to minimize or overcome these obstacles?*

The SoL Center at University Presbyterian Church is a faith-based education center for adults, who seek to explore the full dimensions of Christian life in the 21st century.

University Presbyterian Church (UPC) is an urban church on the near north side of San Antonio. Located next the campus of Trinity University, UPC serves more than 300 members representing small children to adults. The demographics of the church's congregation are predominately Caucasian with a few Hispanics and Asians. UPC is home to the UPC Children's Center featuring a daily early childhood education program.

The SoL Center is a new program at UPC built on the successes of the UPC Children's Center. A board of directors representing diverse backgrounds and areas of expertise guides the SoL Center. Twelve individuals including a faculty member of the University of Incarnate Word, a retired faculty member from UTSA, a representative from the Jewish community, an Episcopal church member, a representative of the Session of UPC and other members of UPC or Mission Presbytery are currently serving on the board of directors.

The initial board of directors was cultivated with the idea that diversity of expertise would support the development of creative and dynamic program offerings. During the first year of operations the SoL Center focused primarily on developing and offering successful program content. This focus enabled the SoL Center time to build successful experiences while exploring the overall vision and mission for the Center.

As a start-up organization the SoL Center faces challenges in decision making related to programming, administration, grant funding resources and choosing strategically from alternative community opportunities. At present the SoL Center does not have a strategic business plan which would support the decision making process of the organization.

Building a strategic business plan for the SoL Center will involve facilitating a board retreat focused on articulating goals, objectives and strategies. Through strategic planning activities I hope to facilitate the board's expanding understanding of the mission and vision of the SoL Center. This process will help the board define short and long-term goals as well as explore strategies for goal accomplishment. The one-day workshop will be followed by my attendance at committee meetings in the spring and summer months to continue the dialogue of strategy definition and clarification.

The outcome of the strategic planning process will include a written plan that the board of directors can use to guide future decision making.

Time is a potential obstacle for this project. Assembling the board for meetings including the full-day workshop can be challenging. The board has already demonstrated significant commitment to the development of programming and resources for the SoL Center. Most of the board members also serve in a variety of other volunteer capacities. Scheduling additional planning beyond the one-day workshop will be dependent upon board member calendars and availability.

A second challenge for the process will be the completion of the first calendar year of operations for the SoL Center. At this time four board members will conclude their service commitment to the board. Four new board members will be joining the board during the strategic planning process. These board members will need to be carefully briefed about the process to date without unduly influencing their creative potential contributions. Board members and other volunteers will need to be cultivated to expand the overall goals of the SoL Center related to growth and future programming.

2. *Briefly describe the activity that you propose for your project and indicate how you arrived at the idea that such an activity is need in your setting.*

The SoL Center board of directors began meeting as an advisory committee in the spring of 2001. The initial advisory committee began collaborating to define the early activities, programs and services of the SoL Center. Early exploration included examining similar successful models at Columbia Theological Seminary and Madison Avenue Presbyterian Church in New York City.

During the fall of 2001 the SoL Center offered its first series of programs. Program evaluations were developed during the first fall term. Implementation of program evaluation occurred during the second term of the fall. Evaluations provided feedback related to program content, instructors, and topics of future interest, course-offering times and further participant comments. Dr. Julie Miller, University of the Incarnate Word faculty, and I developed program evaluations.

During the fall term a small sub-group of the board assembled to develop much needed operating by-laws. I was involved in facilitating and supporting this process. The by-laws were developed to inform the board members of their roles and responsibilities. The development of the by-laws enabled key board offices to be identified and filled. Board members soon had official terms of three years. A schedule was developed for cultivation of new board members as well as classes of board members following the strategy utilized by UPC's Session.

As initial year of SoL Center programming began to unfold it became increasingly clear that there was a need for an organized business plan. This plan would support decision making, goal setting, and enable identification of further needs of the Center. Board members also indicated a need for a structure within which to work during

their terms of service. A financial plan was also needed in order to promote effective decision making regarding equipment and other material needs for the SoL Center.

With the board of directors serving as the focus group the needs were identified and clarified over a two – three month period. During this time it became clear that a functional strategic plan would enable the board of directors to better serve the SoL Center. This plan would support effective decision making when planning for the overall needs of the Center. The Center's early success put pressure on the board and staff to make critical decisions regarding programming, grant seeking, finance and revenue, marketing to diverse individuals and the need for volunteer support.

Using my specialization in organizational development from the Pastoral Institute along with my own experience in non-profit management will enable the development of the SoL Center's strategic plan.

3. *Describe the make-up of your focus group and how you determined who would be members.*

Lib McGregor Simmons and I began considering the focus and content of my pastoral project in the summer of 2001. At that time I was already involved on the advisory committee of the SoL Center. During the fall of 2001 we gave consideration to the needs of UPC and as well as current issues in the Presbyterian church which might be applicable to the pastoral project.

My continued involvement and increasing responsibility on the SoL Center advisory board and then the SoL Center board of directors furthered our thinking about the needs of the SoL Center. Lib and I included the SoL Center Director, Jack Jackson, in dialogue about how I might work on a project that would support a need at UPC or in the SoL Center.

Through much discussion and reflection, we determined that the SoL Center board would be an excellent focus group for providing feedback about needs at the SoL Center. By this time in the process I had been working with board members for several months. This experience enabled all of us to have an understanding of the strengths and expertise on the board. The board was clearly seeking ways to further clarify its leadership role on behalf of the SoL Center. Engaging together in this pastoral project on behalf of the SoL Center's needs seemed like an excellent match of need and opportunity.

During a regular board meeting of the SoL Center time was allotted to discuss the possibility of my facilitation of the strategic planning process. The board made a motion and unanimously approved this project.

4. *Describe the needs assessment process you used to verify your hypothesis. Attach any surveys or other instruments used, if any.*

See discussion above. No additional survey instruments were used for this process.

5. *In what way did you interact with your focus group during the planning stage of the project process?*

As described above, I have been part of the SoL Center Board since its inception. I was initially invited to be on the board as the session representative. From the beginning I have played a leadership role in the development of board members, the process of designing the SoL Center by-laws (Appendix A) and the discussions related to my pastoral project.

After the decision to pursue the development of a strategic plan in alignment with my pastoral project, the SoL Center board/focus group allowed me to assume full responsibility and leadership for the project planning.

6. *What are the goals of the project? Include timelines for the completion of each goal. How will you evaluate the accomplishment of the goals? Who will be involved in the evaluation?*

7. *List objectives and timelines for each objective. Indicate your role in the accomplishment of each objective.*

The goal of this pastoral project is to develop the by-laws and a strategic plan for the SoL Center at University Presbyterian Church. The by-laws inform the board of their roles and responsibilities to the SoL Center. The strategic plan will serve as a resource and decision making tool for the SoL Center board.

The timeline for the development of the strategic plan includes:

Fall 2001	Provided leadership role in the development of the SoL Center by-laws. Researched and provided models of by-laws of similar organizations in support of this process. Facilitated writing and editing efforts for by-laws. Serving in on-going capacity of updating by-laws as they continue to be influenced by the unfolding strategic plan and program assessment.
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January 2002	Presented the project proposal to the SoL Center Board of Directors.
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Objective: Invite the Board of Directors to serve in the capacity of focus group and strategic planners to meet the need of developing a strategic plan for the SoL Center.

March 2002

Gave a brief presentation to the SoL Center board defining strategic planning process so that all members could be prepared to attend the April 27, 2002 strategic planning retreat.

Objective: Provide background information to the board of directors in order to increase comfort and knowledge related to the strategic planning process. I was responsible for finding appropriate resources in order to provide and educational opportunity for all participants. This included the use of the Strategy Articulation Map (SAM) and the Beatles as an example. (Appendix B.)

April 27, 2002

Facilitate a strategic planning retreat. (9:00 a.m. – 3:00 p.m.)

Objective: Facilitate strategic planning retreat. Retreat outcomes include the identification of key objectives for the strategic plan. The development of a basic framework of objectives, critical processes and strategies. This framework will guide the work of individual committees in further identifying the strategies and time line for the organizational business plan. The business plan will enable the SoL Center to make decisions about opportunities and programs for the future.

I was responsible for the development of the agenda for this event. (Appendix C.) I prepared a Strategy Articulation Map for the SoL Center in order to have a working framework for our efforts. (Appendix D.) I also developed an end of workshop evaluation to be completed by participants. (Appendix E.)

May – August
2002

Attend committee meetings to define goals, objectives and strategies. Determine priorities for action in the coming year.

Objective: Further the strategic planning process identifying specific strategies and details of committee work, responsibilities, additional resources needed (such as volunteers, grants, materials, instructors) to support the strategies. Meeting dates/times were identified at the retreat. One meeting was set for each summer month to include June, July and August. I will continue in the facilitator role for each committee meeting.

September 2002 Submit a strategic plan to the SoL Center Board. The business plan will need to be approved by the SoL Center Board as well as the Session of the University Presbyterian Church.

Evaluation:

The SoL Center board members will be given an opportunity to evaluate the strategic planning process. Evaluations were developed and distributed at the completion of the strategic planning workshop. These evaluations enabled board members the opportunity to assess my facilitation of the retreat workshop, the materials and tools used for strategic planning and their appropriateness for this effort. (Appendix E)

On-going evaluation will occur as board members are given the opportunity to comment on the strategic plan itself. Follow-up evaluation will occur as the new plan is implemented. The strategic plan should serve the SoL board as a dynamic and a fluid tool with which to make decisions and determine direction. Changes should be made to the plan as further data and resources become available through additional programming successes.

8. *What knowledge is needed to accomplish this project? Of that knowledge, what do you presently feel you already have and how did you obtain it? What knowledge do you need to get and how do you propose to obtain it? Please be specific.*

This project requires an in-depth understanding of the strategic planning process. It also requires the understanding of and ability to support adult group learning and process. Facilitating group process requires the ability to listen, feedback, ask critical questions and promote full group interaction.

Through my career in non-profit management I have had the opportunity to be a participant in a number of strategic planning processes. My course work at Incarnate Word University has added critical information, strategies and resources to my understanding of strategic planning. Both experience and course work will also support my skills in leadership and facilitation of the group process of strategic planning. I am excited about the opportunity to apply my experiences and graduate learning to a project in service for the SoL Center.

This group has already been working together for quite some time. As a group we are knowledgeable about each other's expertise, experience, skills and interests. The group has a familiarity with me and I with them. This will be an advantage and a disadvantage. Because the group understands my skills and experiences it will be more difficult for me to remain neutral throughout the strategic planning process. I will need to make considerable effort to engage group members without bringing the bias of my experience and expertise to bear on the unfolding plan. There will be many opportunities for me to utilize my training as a mediator, pastoral counselor, and non-profit resource provider.

I will also be challenged to put to use my newly formed understanding and skills of strategic planning. This will involve not only listening but also applying strategic planning information, assessment design, group process, and organizational behavior resources to the facilitation process. I will be engaging my own new knowledge and application of strategic planning while facilitating the group's efforts toward developing a cohesive strategic plan. I have been cultivating this understanding and assumptions while developing a strategic plan. I hope to serve as a catalyst to address assumptions throughout the process.

9. What skills do you need to accomplish this project? What skills do you already have and how did you develop them? What skills do you still need and how will you gain these skills? Again, be specific.

Skills, which will support this project, include:

- mediation,
- listening,
- relationship development,
- facilitation,
- communication (oral and written), and organization.

These skills have been part of my academic and professional development. Participating in the Project Planning class last summer helped me assess these skills and begin to explore how I might use them in support of this project. While I believe these skills are already part of my "tool kit," it is necessary to continually practice and fine tune them. It is humbling to assemble these skills on behalf of the SoL Center and its strategic plan.

The skill I feel most challenged to continue developing is that of corporate prayer. I continue to learn to be present to the Holy Spirit when I am called upon to lead an opening or closing prayer for a group. This is an area where I feel less confident in my prayer and communication skill. Continued practice of this skill will support my own skill development.

Through the strategic planning process I will have many opportunities to test and assess my skills. I hope to use the skills I've described in a contributory manner. I hope to gain further understanding and confidence in my ability to use these skills in a professional and ministerial setting.

10. What attitudes do you need to accomplish this project? What attitudes do you already have and how did you develop them? What attitudes do you need and how will you develop those attitudes? Be specific.

Respecting and valuing the gifts of each individual is an important attitude when working with volunteer groups. This particular group reflects significant volunteer and professional expertise. Each individual will be bringing creative, valuable ideas to bear on the strategic planning process. Each person can be encouraged to share his

or her ideas in an atmosphere of creative generativity. It will be my responsibility to set the tone for cooperation, consideration, creativity and respect. Setting this tone will mean consistently demonstrating these attitudes toward each participant throughout the day. (Hopefully I have already set this tone to some extent by cultivating a listening relationship with board members along the way.)

In addition I have been developing an attitude I call "emptying out." This attitude is attentiveness to getting myself and my agenda, drive, desires, arrogance, sense of knowledge, out of the way. By getting out of the way, I can better participate in a servant role. Practicing servant leadership is an attitude I have been cultivating throughout my graduate experience. Through practicing an attitude of servant leadership I have uncovered a greater sense of openness to the Holy Spirit rather than trying to "control" the process out of my own effort.

Emptying out requires the use of prayerful reflection. I must quiet myself in order to hear the words, concerns and ideas being express by participants. It will be critical to the success of the strategic planning process if I can be present without being intrusive. This attitude makes room for God's participation with all of us – it isn't up to me to lead this group through this process, but rather to rely on God to do the work in each of us.

11. How will you involve other staff to insure that leadership is being developed to continue this process? Is it your hope to make this an on-going activity in the pastoral setting dependent or independent of you? Explain your comments.

The Pastor and SoL Center Director have been and will be involved throughout the strategic planning process. In addition, the newly elected board members have been invited to attend the strategic planning retreat. This will enable those coming onto the board and well as those continuing their positions to be engaged in the process. While I will be facilitating this event, my own term on the board also includes two more years of service. Hopefully, we will have a significant base of knowledgeable individuals who will serve to implement and utilize the business plan that is an outcome of the strategic planning retreat.

12. What are your personal learning goals as a result of this project? What are your professional goals as a result of this project?

My personal learning goals are:

- To gain additional experience in the church setting.
- To build on my personal skills as a facilitator, group leader and mediator.
- To practice and expand my understanding of myself in terms of getting out of the way and being led by the Holy Spirit.
- To apply my academic course of study in a service capacity for the SoL Center.

My professional learning goals are:

- To apply what I have studied in the way of working with adult groups, facilitation, and pastoral counseling, strategic planning and organizational development on behalf of the growth of the SoL Center.
- To put into practice academic study to develop an organizational strategic plan.
- To expand my experience with and understanding of working collaboratively with adult groups and volunteer boards.
- To gain further insight into my direction and purpose in ministry.

13. *What expertise do you want your resource person for this project to share with you?*

I look forward to continued work with Pastor Lib McGregor Simmons and SoL Center Director Jack Jackson. We have formed a good working relationship around the needs of the SoL Center. I have been engaged in a variety of ways over the course of my service on the Session and the Center's board. I have come to understand the process and operations of a Presbyterian Church, I have gained insight into the diverse roles and responsibilities of the minister and I have expanded my understanding of ministry to include the significant role of lay ministry.

I will be looking to Lib and Jack to provide additional feedback as I continue to explore and consider my future work or ministry. Through this process I anticipate gaining further feedback and insight into my strengths, weaknesses and areas of growth personally and professionally. I hope to advance my understanding of God's purpose for me as well as ways in which I may work for God's glory. I look forward to their input as I continue to explore my work life journey and ministry.

Throughout my coursework I have found Lib, Jack, the SoL Center board of directors and many others to be supportive and informative. These diverse people have caringly nurtured and encouraged my gifts. They often provide me a view of myself that I do not have. I appreciate all the feedback I continue to get and consider it to be another form of intimate communication with God. Through God's revealing light I feel led to continue on the journey of applying my gifts in service to others.

Project Evaluation

1. *Describe how your Focus Group helped or detracted from your project. Be specific.*

The SoL Center board served as active participants throughout the pastoral project process. I found the board to be thoughtful, constructive, approachable and a rich resource of insight and expertise. Working with SoL staff and the entire board has been an enlightening experience.

Individuals on the board brought leadership, experience and expertise to all aspects of the strategic planning process. Each board member has continued to enthusiastically participate in the unfolding process, which is becoming the SoL's strategic plan.

The make-up of the SoL Center board includes individuals with diverse professional and volunteer experiences. These experiences have enriched the process of strategic planning. While some board members may have had prior experience with strategic planning, others have not. It seemed important to the process to provide opportunities to gain further information about strategic planning in support of a successful process.

The SoL Center board is also going through significant changes as it concludes its first year of operations. Four of the initial twelve board members are completing a single year term on the board. Four new board members are coming onto the board. In addition, new officers have been elected for the board. This transition has added to the time needed to fully complete the strategic plan. It has also added fresh eyes and ideas to the planning process – ultimately enhancing the strength of the strategic plan.

2. *List each of your original goals and indicate if you accomplished the goal as outlined in your original evaluation criteria.*

The goal of this pastoral project is to develop by-laws and a strategic plan for the SoL Center at University Presbyterian Church. The by-laws inform the board of its roles and responsibilities. The strategic plan will serve as a resource and decision making tool for the SoL Center board in planning for the future.

Appendix A provides the by-laws as they reflect inclusion of decision made during the strategic planning process. For example the by-laws have been changed to define the board make up of 12 members in addition to the pastor and SoL Center director. New board members have been solicited with the need for further

diversity. Board members have also been cultivated with expertise needed to enhance the growth efforts of the SoL Center.

Appendix G reflects the strategic plan including the work of subcommittees over the summer. The strategic planning process has required more time than originally anticipated. Timing issues have included the meetings needed to complete the secondary strategies indicated during the strategic planning retreat. With the onset of summer months board members, while dedicated to the process, also had travel and holiday plans to contend with in setting additional meeting dates. The final strategic plan will not be completed until early fall 2002.

Although the entire strategic plan is not yet available, the board was and is actively engaged in the on-going planning process. The entire board was present during the one-day strategic planning retreat. All board members were engaged in discussion and enthusiastically contributed ideas and resource suggestions. Board members have continued to be active participants in the full range of strategic planning meetings. Board members have contributed thoughtful suggestions, ideas and expertise. New board members have contributed diversity and experience to the process as well. The over all strategic planning process has seemed engaging and productive.

At the same time the true test of the strategic plan itself will come in the future. The SoL Center board and staff will have to determine the success of the strategic plan as it considers decisions for the future of the SoL Center. Through on-going evaluation and assessment the SoL Center will achieve revenue generation to support operations, the use of volunteers to accomplish Center operating activities and the offering of creative program content appealing to a diverse audience of adults. On-going evaluation will be needed as well as continued monitoring of the strategic plan. Elements of the strategic plan may also need to be evaluated on behalf of the SoL Center as successes and challenges present themselves in the future.

3. *How did you gain the knowledge you needed as described in your proposal? Was there other knowledge you needed that you did not recognize in advance? Will you need that knowledge in the future and if so, how will you obtain it?*

My course work during the spring semester significantly supported the knowledge necessary to carry out this pastoral project. While I was considering and researching the strategic planning process I was also participating in a challenging course on strategic planning. This course enabled me to practice many of the analysis skills necessary to facilitate strategic planning for the SoL Center. This course also provided me with significant background information and resources for supporting the process.

I was also able to draw upon other resources and experiences with strategic planning. As I mention in my project proposal I had already been involved in

organizational strategic planning in my career. These experiences helped me consider what I needed to provide for the SoL Center members to enable them to engage in the strategic discussions. This also helps me continue to prepare for meetings with the sub-committees about elements of the strategic plan.

I feel the strength of my communication skills continues to support my professional development in working with adult groups. Through these communication skills I am able to successfully work with diverse individuals, strong personalities and passionately dedicated volunteers. These skills will continue to be a significant part of my professional portfolio in working with non-profit organizations.

4. *How were you able to gain the skills you expected to need? Were there other skills you needed that you did not recognize in advance? Will you need these skills in the future and, if so, how will you obtain them?*

This was perhaps one of the most surprising areas of learning for me. While I had an understanding of my communication skills and gifts as a facilitator, I have come to see them in a new light. This process not only let me continue to grow in my professional practice as a facilitator, but also gave me the chance to cultivate and nurture more confidence in this area.

I think that I do not often realize the impact my communication skills have on a group or individuals. I am a careful and respectful listener. This supports and enhances working environments with groups and individuals. I am learning that I have significant gifts in this area – and that I can be confident and caring in my understanding of my own abilities.

I have also regained an understanding of myself as an educator. Teaching has been at the core of what I have done throughout my career. But only recently have I come to see teaching as central to my gifts and call. Teaching is not just a skill, but a significant part of my overall identity. Working with the SoL Center board and staff has given me additional time and feedback in understanding my teaching and facilitation gifts.

5. *What attitudes were you able to develop that you expected to need? Were there other attitudes you needed that you did not recognize in advance? Will you need these attitudes in the future, and if so, how will you develop them?*

I am continuing to explore what it means to engage myself as a servant leader. Reading I have done throughout this process has supported my understanding of this role. For example, I continue to read and reflect on the work of author Parker Palmer. In his books Let Your Life Speak and The Courage To Teach, Palmer supports the ideas of servant leadership. These two books have given me great pause as I continue to uncover my roles and responsibilities in working as a

servant leader. In this capacity I find myself more accessible to the influence of the Holy Spirit rather than trying to conduct the work out of my own strength.

I have discovered that some of the work of strategic planning is intuitive in nature. This is a particular blend of thoughtful listening, assessment, reflection and practice. As I described earlier, to empty out oneself enables a different attitude of engagement when working with others. Listening at a deeper level can provide an opportunity to hear individual needs and ideas.

One example of this occurred early in the strategic planning process. After I spoke at the board meeting presenting the idea of developing the strategic plan, one board member approached me with several questions. Her questions ranged from will lunch be provided to more detailed concerns about what the strategic planning would involve. Upon reflection on her means of questioning, I came to perceive that she had fears and concerns about what this strategic planning would be all about. I realized that the Beatles Strategy Articulation Map (SAM) might be a way to present strategic planning without being intimidating.

The Beatles SAM provided the perfect vehicle for making strategic planning seem fun and easy. Upon reflection, I have come to see this process of waiting and listening as part of working directly with the Holy Spirit (and getting my own self out of the way.) Rather than reacting to this board member's questioning in a defensive way, I was able to carefully consider what her questions were really about. I came to realize that her questions were out of her own discomfort and lack of experience with strategic planning. She was seeking more information about what the process would be like. Introducing the Beatles SAM enabled all of us to gain a clearer and more hopeful picture of the strategic planning process.

6. *How were you able to minimize or overcome the obstacles you expected to encounter? What obstacles did you encounter that were not expected? How did you minimize or overcome them?*

The greatest challenge to the strategic planning process is the time it takes to complete the entire process. I have come to see that strategic planning involves thoughtful and careful reflection, dynamic discussion, creative communication and a long-standing dialogue. It is through time and reflection that the process unfolds. The process is not one that can be hurried or kept on a rigid time line. Because strategic planning engages a number of individuals, in this case a volunteer board, it is not a process to be pushed along. Attentive strategic planning needs time to ensure the results needed and desired for the organization that will be using the strategic plan.

In the future, I will have a better understanding of the time it takes to complete a strategic plan. It will be important to use the element of time to cultivate the process. This will support the quality and value of the plan for the organization. Without taking the proper amount of time to listen, gather information, assess

data, reflect with group members and re-evaluate, the strategic plan cannot evolve. Attentiveness to this timing rather than rushing to decision making will support effective strategic planning in the future.

7. *How do you perceive the work you did as contributing to the leadership capacity of others? To the development of pastoral ministry in general?*

Through the strategic planning process the SoL Center board members have been able to see the continued growth of the organization. At the beginning of the process the SoL board seemed uncertain and overwhelmed about all that needed to be done. The strategic plan enables participants to begin to make decisions about priorities, needs and tasks. Individuals are being identified and invited to be involved in the needs of the SoL Center.

In observing board members participating in the subsequent summer committee meetings I have noticed an increase in confidence in their own ability to assess the plan and key elements. With growing confidence new leaders are beginning to emerge. Rather than questioning me, participants are questioning and dialoguing with one another. I find myself taking more and more of a facilitator role.

As group and individual leadership capacities increase I am able to listen, take notes, and keep the process on track in terms of time and task. My role is supportive, while more of the leadership and engagement is coming now from board members.

Board members are increasingly engaged in the overall process of setting goals, cultivating ideas, seeking solutions and directly engaging more people in the process. It is exciting to realize that group participation has changed in such significant ways! I look forward to observing new leaders engaging in the on-going process of service on the SoL Center board.

8. *List each of your personal learning goals and your professional goals as outlined in the project proposal. Indicate for each goal how well you accomplished that learning or professional goal.*

My personal learning goals were:

- To gain additional experience in the church setting.
- To build on my personal skills as a facilitator, group leader and mediator.
- To practice and expand my understanding of myself in terms of getting out of the way and being led by the Holy Spirit.
- To apply my academic course of study in a service capacity for the SoL Center.

The pastoral project has given me an opportunity to work on something specific on behalf of the University Presbyterian Church. While I have been focused on a specific project, I have also had an opportunity to reflect on the "bigger picture."

What has it meant and does it mean for me to be a member of an active and growing community of faith? How do each of us bring our gifts to the unfolding growth and development of the church? Where do I "fit in" to my church community and the larger community as a Christian? These continue to be questions of my own personal growth and development.

Being involved in the growth and development of the SoL Center has given me the chance to flex both old and new muscles. I have gained new confidence in my abilities as facilitator, group leader and mediator. I have come to see my gifts in these capacities in new ways. I have come to see too that learning in these roles is a continual process. As a member of a community of faith I will continue learning from those around me. My prayer is to serve others in their learning and faith journeys as well.

I have also continued to engage in this process utilizing prayerful reflection as a significant part of the process. No longer do I see my work as something I do alone, but rather as a process engaged in dialogue with God, Jesus Christ and the Holy Spirit. I will need to continue to develop the practices of quiet reflection, study and learning throughout whatever work process comes along. These practices can also support and enhance my personal development.

I have been humbled by the process of bringing my academic experience into dialogue with the board members of the SoL Center. These board members are knowledgeable leaders in their own right. They come with vast experience and expertise. Each board member continues to guide my process with his or her questions, information, ideas and individual resources. I am so thankful that the board was willing to be involved in my project!

My professional learning goals were:

- To apply what I have studied in the way of working with adult groups, facilitation, and pastoral counseling, strategic planning and organizational development on behalf of the growth of the SoL Center.

Over the course of working with the SoL Center board I have been able to practice many elements of strategic planning, organizational development and working with adult groups. My experiences continue to inform and direct my work life journey. I have gain confidence in my abilities to think critically and strategically as well as my understanding of myself as a facilitator.

- To put into practice my academic study of organizational development. The organizational development program provided me with theoretical framework for understanding the relationships between information (data) and decision making. As a type of organization a church has its own unfolding processes of interaction, goal setting, decision making, shared leadership and culture. Experience in this community along with my academic program at the University of the Incarnate Word has significantly influenced my understanding of organizational

development. It has also provided me with an extended opportunity to observe organizational development in a faith community.

The strategic planning course I took this spring greatly supported my efforts on the pastoral project. The course content significantly influenced the ways in which I went about preparing for the strategic planning workshop. I was particularly grateful for the tools the strategic planning course provided.

- To expand my experience with and understanding of working collaboratively with adult groups and volunteer boards.

Working with a volunteer board can be exciting, intimidating and challenging. I have been grateful for the care and thoughtfulness of this particular board. They could not have been a more supportive group of co-learners! I have been blessed to work with a knowledgeable, creative and dynamic group of individuals. As we continue to develop the SoL Center strategic plan, I believe we will also continue to build our capacity as board members and leaders on behalf of the SoL Center. I have enjoyed learning together with this group of adults!

- To gain further insight into my direction and purpose in ministry.

This continues to be the most challenging aspect of my learning journey in the pastoral institute and in my work life. I am humbled by the struggle this process is. I am grateful for all those around me who graciously and thoughtfully continue to engage with me and reflect to me the possible directions I should be taking.

As I conclude this project report and the other academic responsibilities of the pastoral institute I look forward to continuing to cultivate and incorporate my learning experiences. Rather than seeing this as a completed project, I see it as an unfolding project. Not only is there more work to do on assembling the final strategic plan, there is also more work to do in integrating all of my academic experiences into my work life journey.

9. *How was your project resource person most helpful? Least helpful?*

Lib McGregor Simmons is a gifted minister. I am constantly grateful for her insights, reflections and inspiration as I work through my pastoral project and the larger work life journey it includes. Lib has been a source of encouragement, support and enthusiasm.

10. Submit your responses to the following question that indicate how your project deviated from the theology of church your originally articulated.

From your experience with this project has your own theology of church or ministry been affirmed, or seriously challenged?

The process of building a strategic plan with and for the SoL Center has affirmed my understanding of the church as a richly diverse, sacred, flexible, respectful blend of tradition and experience. I have continually been challenged and awed by the faith journey of the University Presbyterian Church. I have observed the Holy Spirit present in the creative, prayerful, responsiveness of individuals and the community as a whole. I have been moved by the significant power of God's unfolding plan.

The entire unfolding process of the SoL Center has been an opportunity to see both God and faith in action. The UPC community engaged in dialogue about ways in which to expand its ministry in response to the need for Christian education for adults. The entire community is actively involved in the revealing work of what it means to be church in the twenty first century.

I have been surprised, inspired and motivated by the learning nature of this particular community of faith. The UPC and SoL Center communities are made of diverse people seeking to learn the truth of God's leading in their lives. As an observer and participant I am constantly stretched by the collaborative growth of us all within the community.

How do you find that the practice of ministry, as experienced in this project, differed from the theory which you articulated in the beginning?

I continue to find the practice of ministry to be much larger and more dynamic than my own understanding. (I have so much to learn about ministry and God!) God leads people to be involved so that they might live their own gifts more boldly on behalf of God's purpose. The dynamic nature of God's leading is much larger, more organic, more creative and more universal than I had ever imagined!

I am constantly awakened to God's leading for his servants. Whether it is God's work in Lib and Jack or individual members of the SoL board, it is an incredible presence. God has brought together and will be bringing together specific people for purposes only God knows. When God truly engages with people open to God's call, the possibilities seem to unfold in endless grace!

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Strategy Articulation Map, London School of Economics

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The SoL (Source of Light) Center
At University Presbyterian Church

By-Laws
Spring 2002

I. NAME OF ORGANIZATION

The name of the organization is SoL (The Source of Light) Center at University Presbyterian Church.

II. MISSION STATEMENT

The SoL (Source of Light) Center at University Presbyterian Church is a faith-based education center for adults, who seek to explore the full dimensions of Christian life in the 21st Century.

III. OBJECTIVES

- To assist individuals in the journey of faith.
- To foster community among participants through common study.
- To engage in dialogue that stimulates intellectual and spiritual growth.
- To provide an environment that allows for the free exchange of ideas.
- To encourage discussion within the broader faith community.
- To develop partnerships with groups and individuals along common interests.

III. CHURCH AFFILIATION

- A. The SoL Center is an adult educational ministry of the University Presbyterian Church that seeks to build community and provide spiritual nurture in an environment that allows for the free exchange of ideas. Through fellowship, study, teaching and discussion, the Center aspires to offer a sacred space in which all may find rest and renewal.
- B. The program of the SoL Center is under the auspices of University Presbyterian Church. The management of the affairs of the SoL Center shall be vested in a Board, which is responsible to the Session of the Church.
- C. The SoL Center Director is an employee of the University Presbyterian Church and is responsible to the Pastor.

IV. BOARD RESPONSIBILITIES

A. Duties and responsibilities

1. Oversee the management of the programs and funds of the SoL Center.
2. Make policy decisions for the SoL Center.
3. Approve the budget of the SoL Center.
4. Plan program content of the SoL Center.
5. Evaluate the overall programming of the SoL Center.
6. Promote the program offerings of the SoL Center.
7. Support fund-raising efforts of the SoL Center.
8. Cultivate collaborative partnerships with other churches and institutions.

B. Members

1. The Board shall consist of at least five (5) and not more than twelve (12) voting members which shall include an Elder of the Session. The UPC Pastor and the SoL Center Director and shall serve as an ex-officio members. In the event of a tie, the Pastor would cast the deciding vote.
2. The Nominating Committee will present a slate of new members at the April meeting, and they will be voted on at the May meeting. The members so selected shall take office at the June meeting.
3. No Board member shall receive compensation for his/her services as a Board member.
4. A Board member with three unexcused absences in one year from regular meetings may be removed from the Board.

C. Terms of Board Membership

1. Board members shall ordinarily serve a term of three years, but no Board member shall serve consecutive terms either full or partial aggregating more than six years.

2. A Board member having served six years shall be ineligible to serve for a period of at least one-year.
3. There shall be three classes of Board members as nearly equal in number as possible of which one class shall expire each year.

D. Officers

1. The officers of the Board of the SoL Center shall consist of a Chairperson, a Vice-Chairperson, a Treasurer, and a Secretary.
2. The officers of the Board of the SoL Center shall be elected by the Board at its June meeting.
3. The Session shall confirm the election of the officers.

E. Responsibilities of Officers

1. Chairperson shall:
 - a. preside at all meetings of the Board and the Executive Committee and be responsible for the leadership of the Board and its duties.
 - b. work closely with the Director of the SoL Center.
 - c. appoint all committees necessary to conduct the business of the Board include the Nominating Committee.
 - d. serve as an ex-officio member of all committees.
2. Vice Chairperson shall:
 - a. assume duties of the Chairperson in his/her absence.
 - b. provide general assistance to the Chairperson and Director in all functions.
3. Secretary shall:
 - a. record all meetings of the Board and file a copy of all minutes of the Board, pertinent records and yearly program evaluations with the Session.
 - b. notify members of meetings.
 - c. conduct correspondence for the Board.

4. Treasurer shall:
 - a. chair the Finance and Grants Committee of the SoL Center.
 - b. assist the Director and University Presbyterian Church Financial Secretary in matters pertaining to finances and general accounting.
 - c. prepare or cause to be prepared a financial report, an annual budget containing a forecast of expenditures for the ensuing year, and an estimate of revenues and available funds for the ensuing year, and such reports as the Board may require.

F. Executive Committee

1. Consists of the Chairperson, Vice Chairperson, Secretary, Treasurer, SoL Center Director and Pastor.
2. Shall deal with any matters, which require attention between stated Board Meetings.

G. Board Committees

1. The Chairperson and Board may create committees including but not limited to Finance and Grants, Programming, Public Relations/Partnerships and Nominating Committee.
2. The committees will meet at least four (4) times per year.
3. The Nominating Committee will meet to develop the appropriate slate of candidates and officers as needed.
4. The committees will report regularly to the Board and will make recommendations to the Board.

H. Board Meetings

1. The Board shall ordinarily meet monthly but no less than nine (9) times per year.
2. A quorum for the transaction of business for any regular or special meeting of the Board shall be a simple majority of the voting members.
3. The Chairperson or SoL Center Director may call special meetings of the Board.
4. Meetings of the SoL Center Board shall be conducted in accordance with Robert's Rules of Order.

VIII. DISCRIMINATION CLAUSE

The SoL Center shall give full expression to the rich diversity within its participants and shall provide means, which will assure a greater inclusiveness leading to wholeness in its emerging life. Persons of all racial ethnic groups, different ages, both sexes, various disabilities, diverse geographical areas, and different theological positions shall have the opportunity for full participation in the life of the SoL Center.

IX. AMENDMENT POLICY

These by-laws may be amended at any regular or special meeting of the Board by a majority of the members present provided that notice of the proposed changes has been given at least five (5) days in advance and that the agenda of the meeting will include amendments to the by-laws. Final approval of amendments shall be made by the Session of University Presbyterian Church.

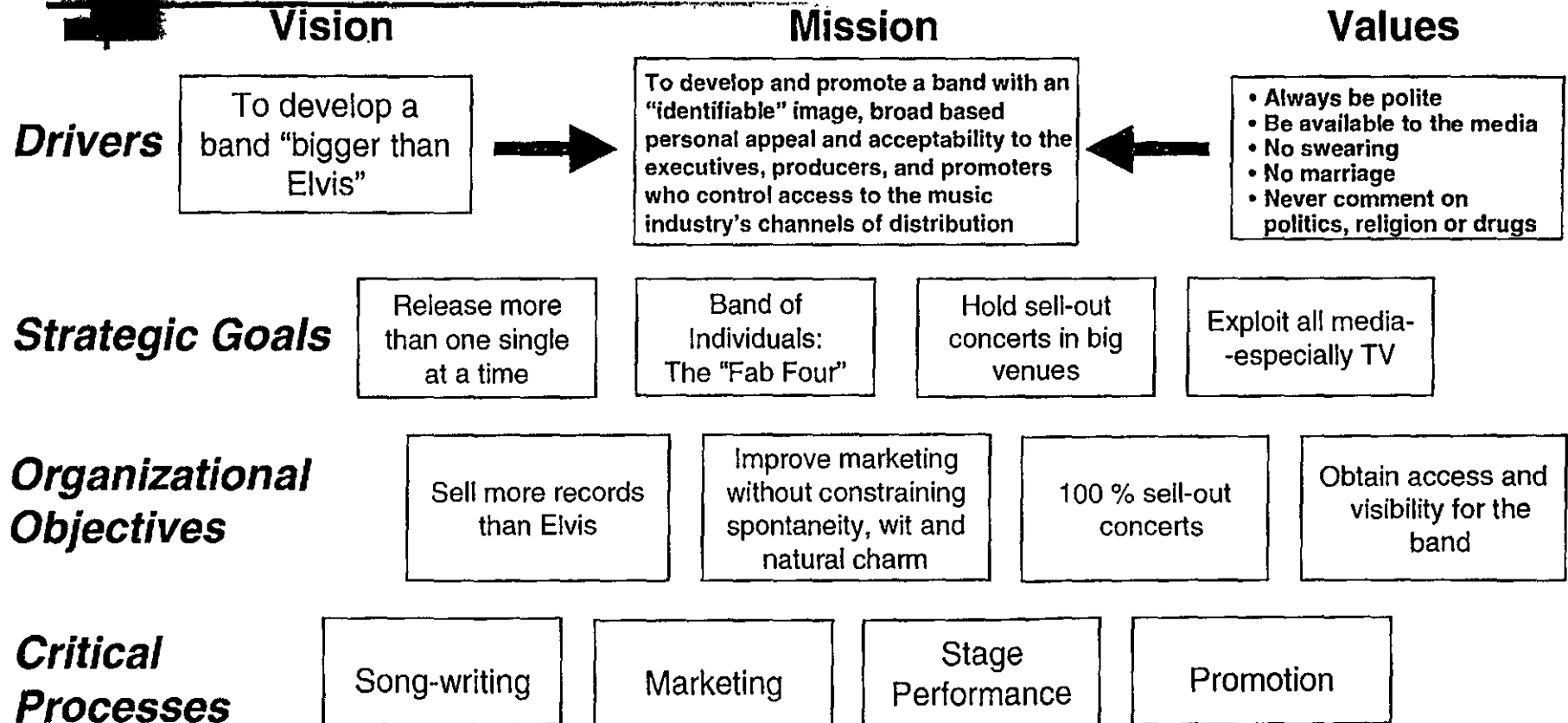
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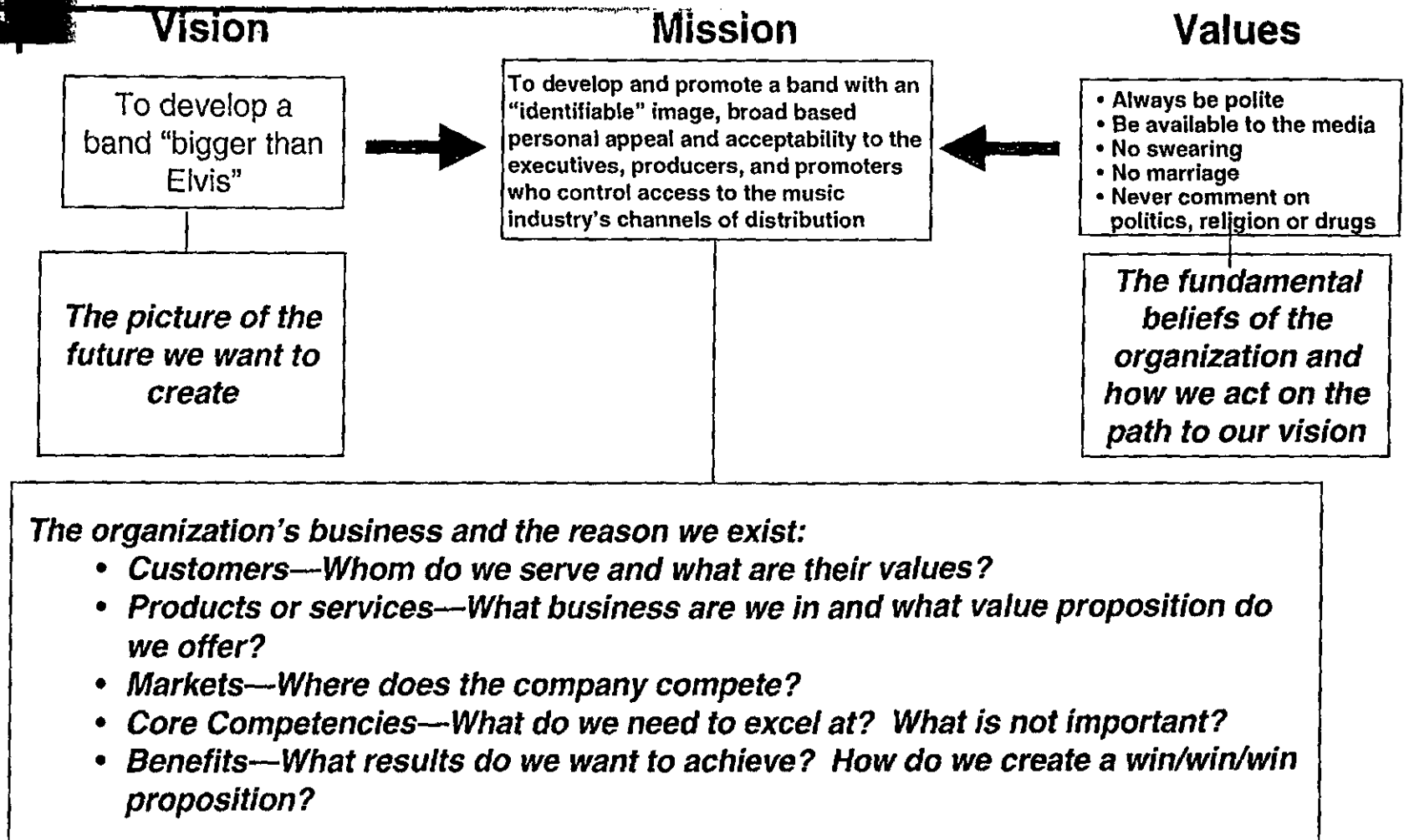
Strategy Articulation Map

- In order to articulate strategy, management may use a variety of media. Experience suggests that **simple, straightforward communications are the best.**
- A successful articulation of the organization's strategy should include a description of:
 - The **vision** of what it wants to become;
 - Its short-term and long-term **objectives**; and
 - How it will be **different** than its peers.
- The **Strategy Articulation Map** documents major components of a developed strategy in a format that can be **easily and effectively communicated.**
- An example **Strategy Articulation Map** shown on the next page is derived from work at the London School of Economics.

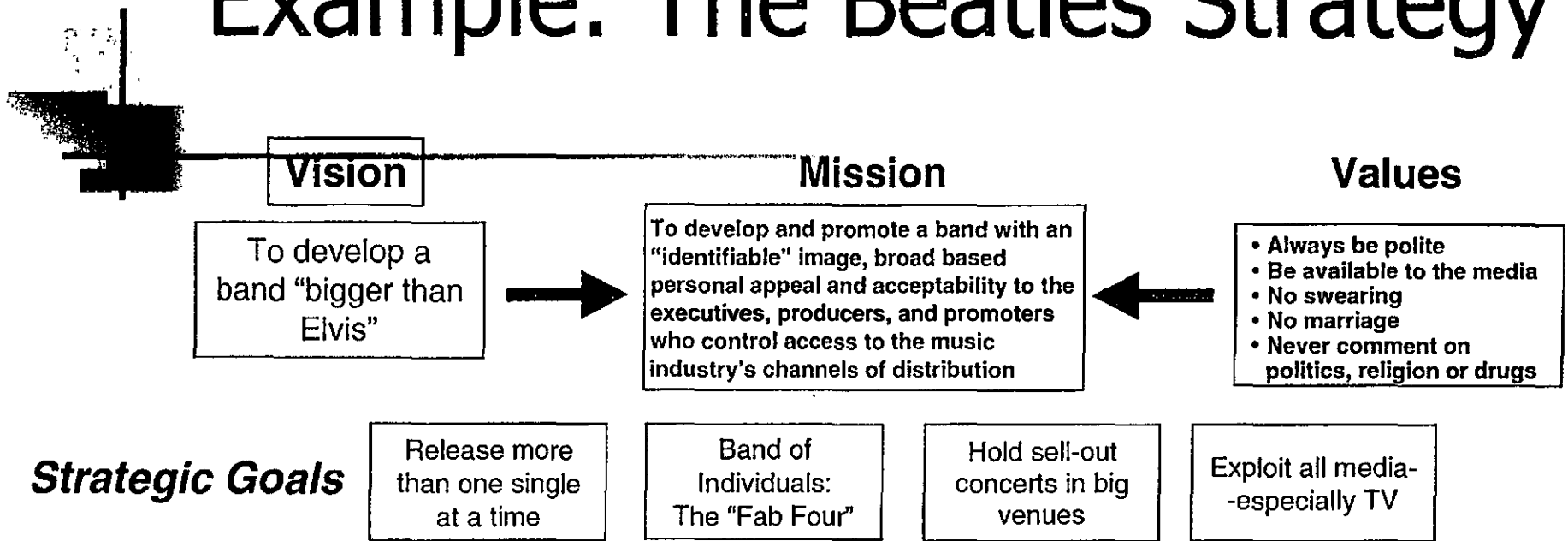
Example: The Beatles Strategy



Example: The Beatles Strategy



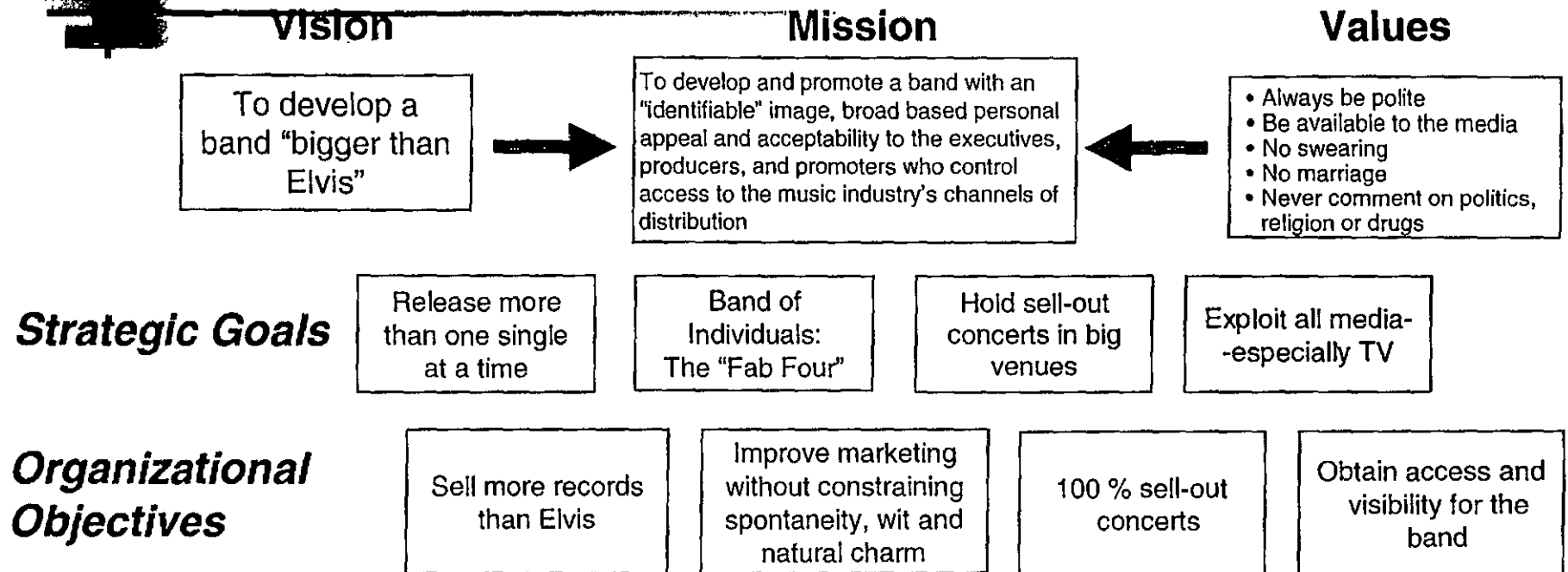
Example: The Beatles Strategy



How will we distinguish ourselves from the competition?

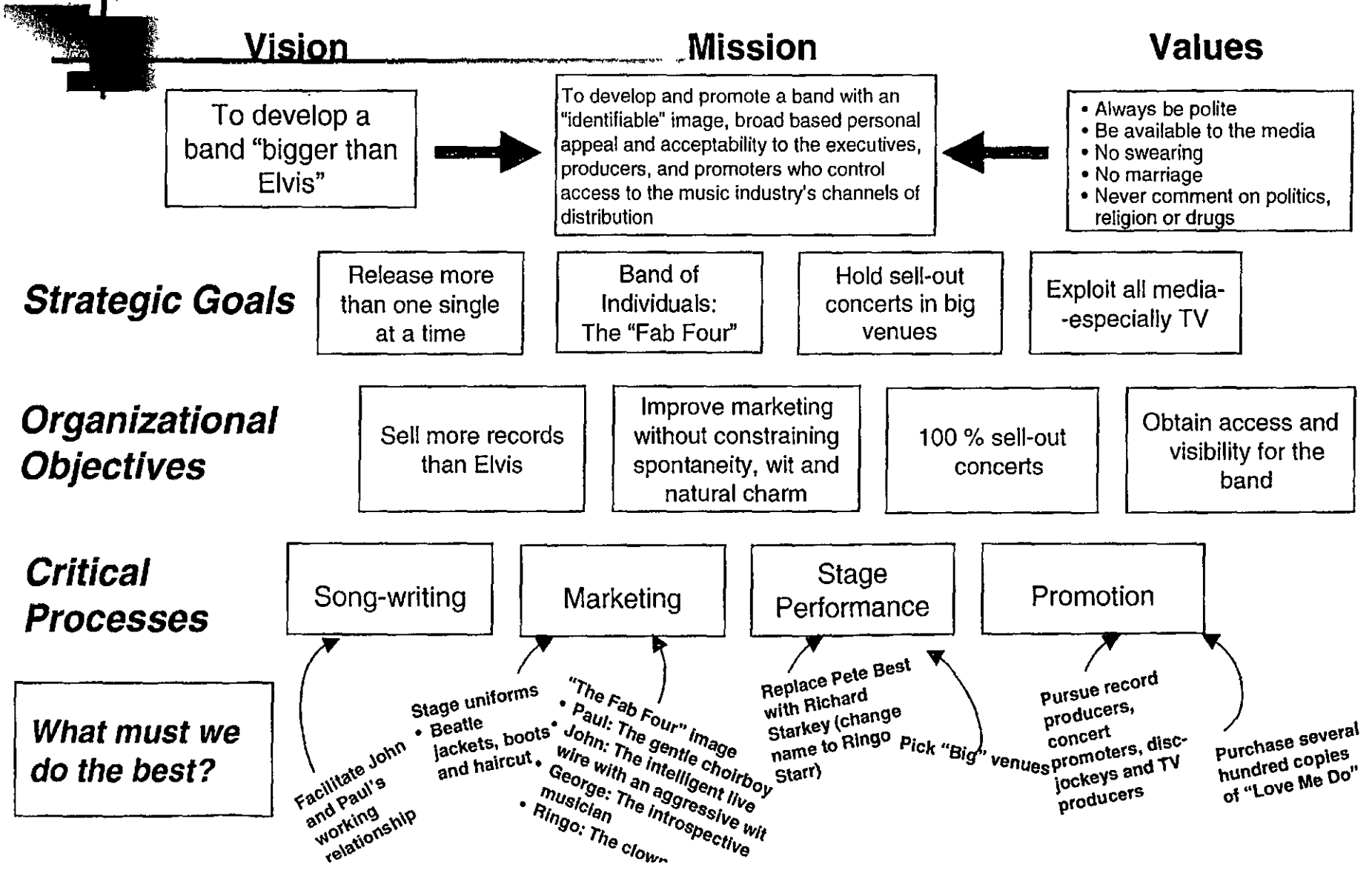
- *Product/Service*
- *User/Customer*
- *Market Type/Category*
- *Production Capacity/Capability*
- *Technology*
- *Sales/Marketing Method*
- *Distribution Method*
- *Natural Resources*
- *Size/Growth*
- *Return/Profit*

Example: The Beatles Strategy



What specific goals do we need to reach in order to achieve our mission?

Example: The Beatles Strategy



**Source of Light Center
Strategic Planning Retreat Agenda
April 27, 2002**

- 9:00 a.m. Welcome, opening prayer, gathering together
- 9:15 a.m. Mapping out the Plan – today's goals
1. Complete the SoL Center Map
 2. Identify committee elements for plan
 3. Committees begin working on further strategies
 4. Committees set further meeting times
- 9:30 Assessment – How are we doing?
Develop success stories and identify strengths
Cultivate programming ideas for 2002-2003
- 10:00 Review SoL Center Map
1. Check critical processes – do they accurately reflect our current thoughts on what we must do best?
 2. Use critical processes to determine organizational goals and strategic goals (see definitions for both on SAM)
 3. filling in the blanks/decisions
- 12:00 Lunch
- Divide the processes into committee oriented tasks
1. Further clarify, define, strategize and prioritize.
 2. Set goals for future meetings.
- 2:30 Conclusion
Evaluation of day
What else do we need to be doing?



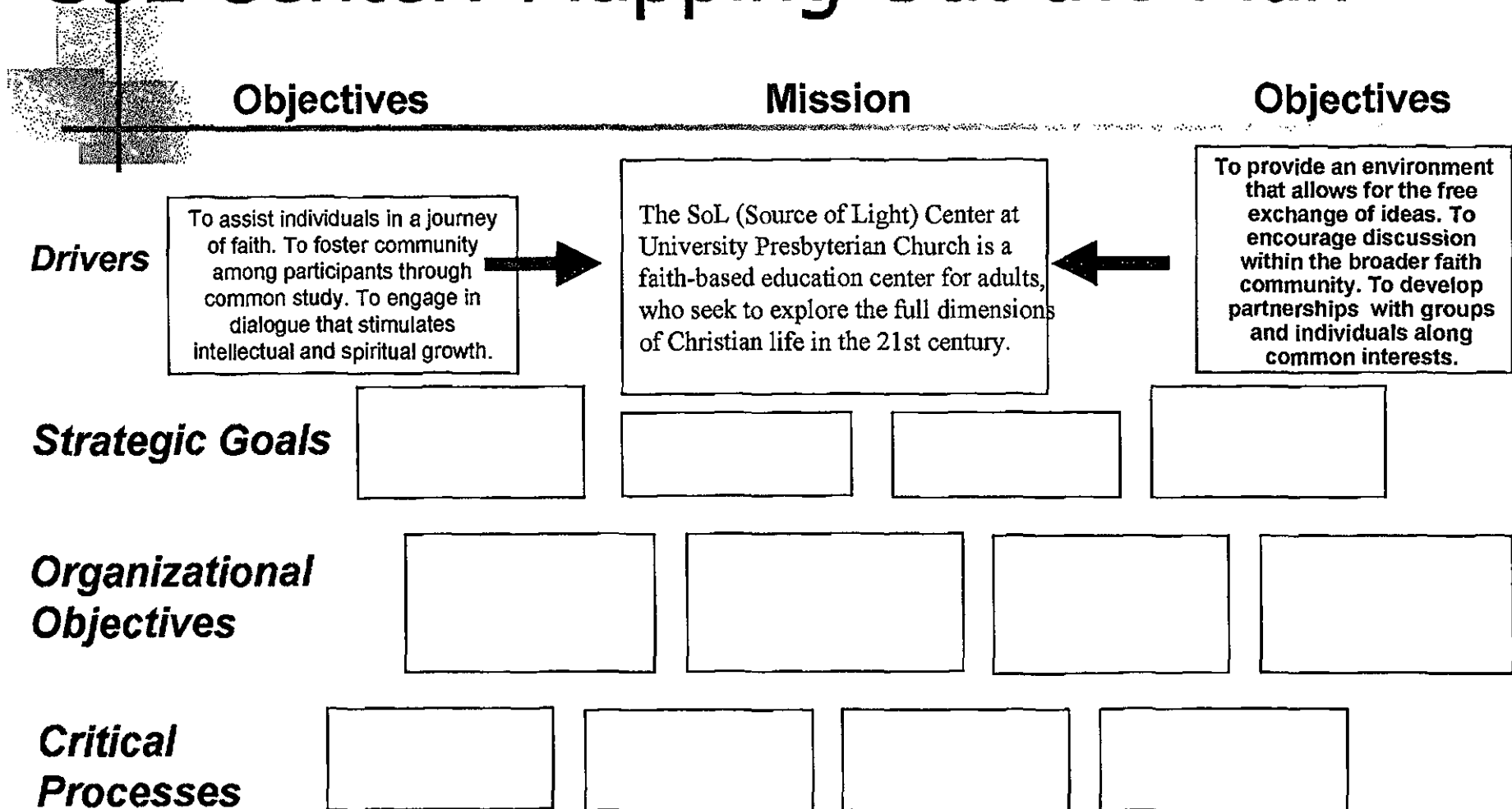
The SoL Center

Strategies: Potential actions that require decisions and the allocation or identification of resources. Strategies are the means by which long term objectives are achieved.

Objectives: Results that an organization seeks to achieve in pursuing its basic mission.

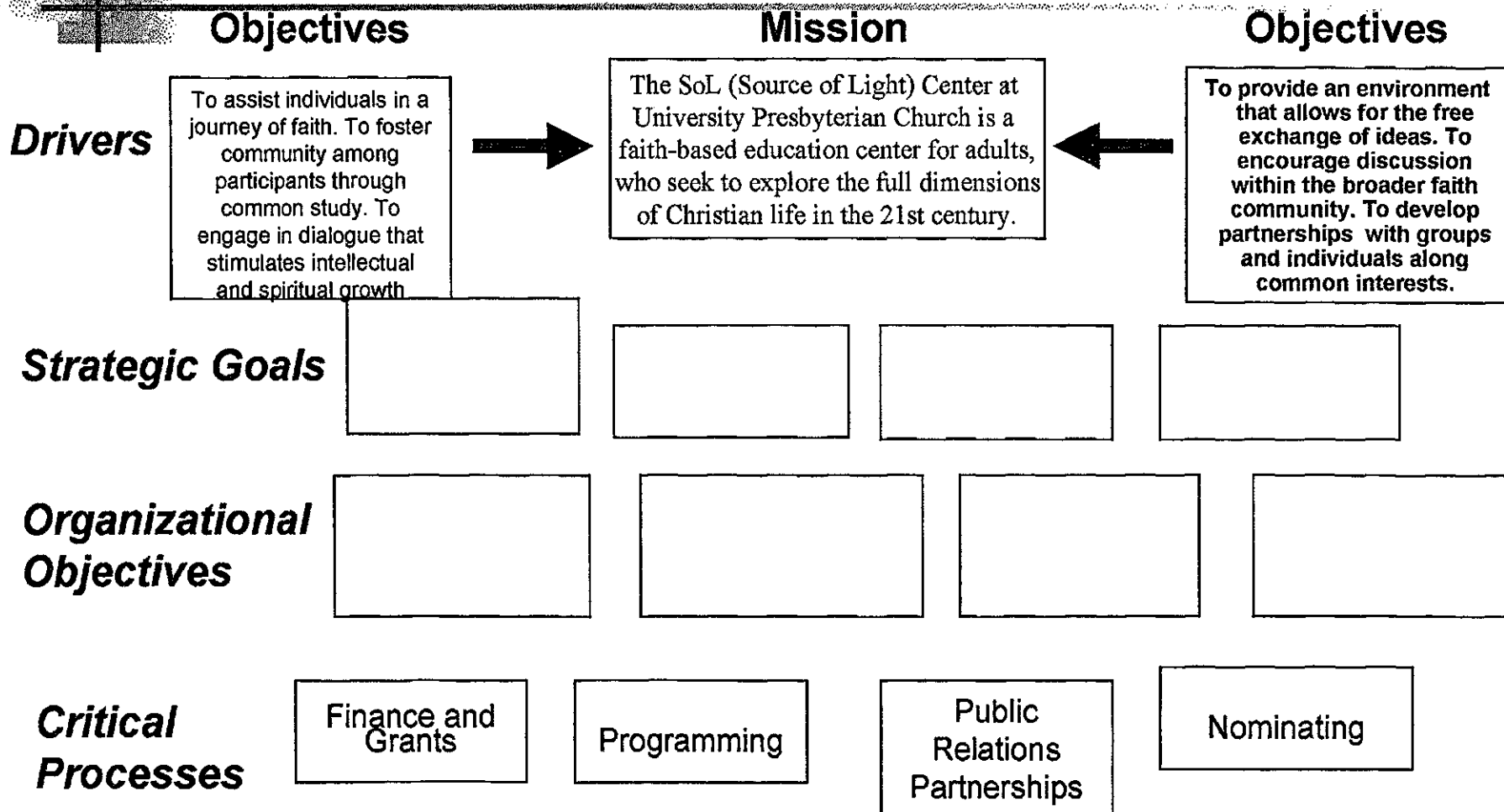
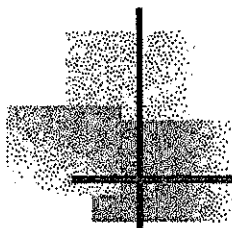
Annual Objectives: Short term milestones achieved over time in order to reach long term objectives.

SoL Center: Mapping Out the Plan



Source of Light

SoL Center Strategy



SoL Center Strategy

Objectives

Mission

Objectives

To assist individuals in a journey of faith. To foster community among participants through common study. To engage in dialogue that stimulates intellectual and spiritual growth



The SoL (Source of Light) Center at University Presbyterian Church is a faith-based education center for adults, who seek to explore the full dimensions of Christian life in the 21st century.



To provide an environment that allows for the free exchange of ideas. To encourage discussion within the broader faith community. To develop partnerships with groups and individuals along common interests.

The picture of the future we want to create

The fundamental beliefs of the SoL Center and how we act on the path to our mission

The SoL's business and why we exist:

- ***Customers—Whom do we serve and what are their values?***
- ***Products or services—What business are we in and what value proposition do we offer?***
- ***Markets—Where does the SoL Center compete?***
- ***Core Competencies—What do we need to excel at? What is not important?***
- ***Benefits—What results do we want to achieve? How do we create a win/win/win proposition?***

SoL Center Strategy

Objectives

Mission

Objectives

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Strategic Goals

How will we distinguish ourselves?

- **Programs/Services**
- **Customers**
- **Adult Market**
- **Capacity/Capability**
- **Technology**

- **Marketing Methods**
- **Distribution Method**
- **Size/Growth**
- **Return/Profit**

SoL Center Strategy

Objectives

Mission

Objectives

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Strategic Goals

Organizational Objectives

What specific goals do we need to reach in order to achieve our mission?

SoL Center Strategy

Objectives

To assist individuals in a journey of faith. To foster community among participants through common study. To engage in dialogue that stimulates intellectual and spiritual growth

Mission

The SoL (Source of Light) Center at University Presbyterian Church is a faith-based education center for adults, who seek to explore the full dimensions of Christian life in the 21st century.

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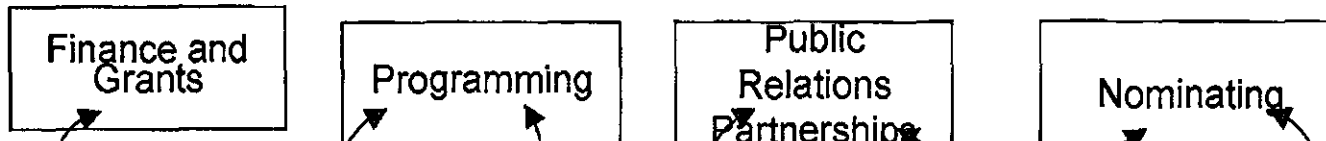
Strategic Goals

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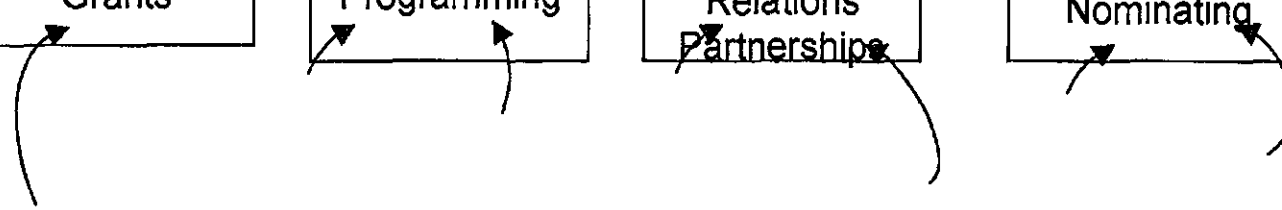
Organizational Objectives

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Critical Processes



What must we do the best?



All participating board members completed SoL Center strategic planning retreat evaluations. Overall evaluation comments were very positive. "Strongly agree," and "Agree" were the most commonly used rating for the retreat and strategic planning processes. The SoL Center board comments reflected a general satisfaction with the strategic planning process, resources, materials and participation levels.

Individual comments at the end of each evaluation also reflected positively on the strategic planning retreat session. While one or two of the evaluations indicated the need for further clarification and planning the assessments would support the experience as relevant to the needs of the SoL Center. Some participants indicated that the Beatles SAM provided a useful model while others found it unnecessary or difficult to understand. Because most of the board members had never participated in strategic planning before, I thought the Beatles SAM provided a fun way to introduce the structure we were striving for.

Facilitating the strategic planning process was an excellent learning experience. In the future I might consider framing the process in a theme relevant to the participants. In this particular case it might have been appropriate to select a scripture text to serve as a theme for the event. Selecting a theme could have enabled participants to have a deeper image to support their thinking about the process. A related theme might also provide the opportunity for the use of resources, icebreakers and encouraging words to keep the momentum throughout the retreat. As indicated in one evaluation, there may also be the need for additional, full board, strategic planning sessions. I will be interested in seeing the board's assessment of the completed strategic plan. I look forward to continuing to work on this process with the SoL Center board and staff.

**SoL Center
Strategic Planning Retreat
April 27, 2002**

Thank you for your time and participation in the SoL Center Strategic Planning Retreat.
Thank you for taking a moment to reflect on the strategic planning process.

Please circle the answer that best describes your feelings about this session.

1. The Beatles SAM provided me an understanding of the strategic planning process.

Strongly agree Agree Disagree Strongly disagree

2. The SoL SAM served as a framework for the strategic planning process.

Strongly agree Agree Disagree Strongly disagree

3. I was welcome to participate throughout the day.

Strongly agree Agree Disagree Strongly disagree

4. My fellow board members were welcome to participate throughout the day.

Strongly agree Agree Disagree Strongly disagree

5. I was included in the strategic planning process.

Strongly agree Agree Disagree Strongly disagree

6. I had the freedom to ask questions or express concerns.

Strongly agree Agree Disagree Strongly disagree

7. The strategic planning process was well organized.

Strongly agree Agree Disagree Strongly disagree

8. The strategic planning process promoted participation.

Strongly agree Agree Disagree Strongly disagree

9. Many ideas were explored through the strategic planning process.

Strongly agree Agree Disagree Strongly disagree

10. The strategic planning process made sense.

Strongly agree Agree Disagree Strongly disagree

11. The strategic planning process helped define the needs of the SoL Center.

Strongly agree Agree Disagree Strongly disagree

12. The strategic planning process supported the development of long range goals for the SoL Center.

Strongly agree Agree Disagree Strongly disagree

13. The SoL Center board will be able to use the strategic plan to make decisions about future opportunities.

Strongly agree Agree Disagree Strongly disagree

14. The SoL Center board will be able to implement goals and objectives as a result of the strategic planning process.

Strongly agree Agree Disagree Strongly disagree

15. The strategic planning process was productive for the SoL Center board.

Strongly agree Agree Disagree Strongly disagree

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Please use the remaining space for additional comments. Thank you!

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Extremely helpful session! Thanks for your leadership!

Please use the remaining space for additional comments. Thank you!

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We addressed "partnerships" but need time to brainstorm about possible connections.

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This was a great opportunity to generate lots of ideas. It's a bit overwhelming to think of all we can do! Now we just have to do it!

Please use the remaining space for additional comments. Thank you!

Great for generating ideas. I feel we need a followup to actually make a plan.

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good meeting - much progress

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How we begin to move toward these goals — implementation.

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Excellent leadership!

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I like that we ended early! A fabulous gift!

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A very nice combination of structure and freedom to explore.

Thank you for your excellent leadership

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IN THEORY!

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IN THEORY

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Please note issues you feel were not addressed during the strategic planning process today. Your feedback will support further efforts to develop the overall strategic plan.

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Well done. Excellent experience to build spirit of cooperation & trust. Good things will come as a result.

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*Would like another session to
review and refine the process +
identify review/revise persons.*

Please use the remaining space for additional comments. Thank you!

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Not familiar with the process as a first-time attendee - I was struggling to comprehend the "Beatles" process and complexity.

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*This was the best church-related
Long Range planning session I have
ever attended J. R. H.*

SoL Center Business Plan

Mission statement:

The SoL (Source of Light) Center at University Presbyterian Church is a faith-based education center for adults, who seek to explore the full dimensions of Christian life in the 21st century.

Organizational objectives:

The objectives of the SoL Center are:

- To assist individuals in a journey of faith.
- To foster community among participants through common study.
- To engage in dialogue that stimulates intellectual and spiritual study.
- To provide an environment that allows for the free exchange of ideas.
- To encourage discussion within the broader faith community.
- To develop partnerships with groups and individuals along common interests.

SoL Center Operations – 2001-2002 In Review

The SoL Center successfully met its mission and organizational objectives during the first year of operations. Successes of the SoL Center included:

- Jack Jackson's significant role in facilitating all of the dynamics of a new program. (Including development of class content and instructor resources.)
- Demonstrated scholarship, passion and knowledge through diversity of instructors and program content.
- Responded quickly to current events through offerings responsive to needs, issues and concerns.
- Ambiance and refreshments provided positive learning environment.
- Identified and attracted adult learners.
- Built community in classes.
- Outreach beyond UPC into the San Antonio community including diverse audience participation.
- Acquisition of grants funding.
- Interfaith participation.
- Groundwork laid for collaborative partnerships in the future.
- Added spiritual elements to content not traditional considered so – such as gardening, film, photography etc.

The SoL Center also has opportunities for the future including:

- Seeking a balance between head and heart in programming content.
- Researching additional programming targeted to meet the needs of older adults.
- Programs that might meet a need by meeting one time per month rather than in the weekly series format.
- Selection process for presenters to insure knowledge, expertise and ability to interact with participants.
- Consideration of on-site and off-site programming elements.
- Bridging secular and religious program offerings.
- Consideration of limited summer offerings to support keeping people involved.
- Scheduling or repeating successful classes.
- Outreach to churches to learn more about their needs and how the SoL Center might meet them through program content.
- Pursuit of additional grants funding.
- Development of support structure to facilitate operations.

Critical Processes

Critical processes are those actions supporting the overall operations and management of the SoL Center. The processes help frame the needs of the Center for the future. Critical process may be used to help the Board and SoL Center director make decisions regarding strategies. During the strategic planning process strategic goals and organizational objectives were identified to accompany the critical processes.

Finance

Strategic goal: Financial Self-sufficiency

Organizational objectives:

- Maintain the balance between course fee and stipend expense.
- Maintain the balance between finance (revenue) and grant funding.
- Seek outside sources for attendance and scholarships.
- Explore development of church membership opportunity to include annual membership fee structure.
- Explore the development of individual membership opportunity to include annual membership fee structure.

Grants

Strategic goal: Financial Self-sufficiency

Organizational objectives:

- Generate \$20,000 in grant funding for 2002-2003.
- Maintain balance between finance (revenue) and grant funding.
- Seek diverse funding opportunities.
- Seek endowment fund opportunities to support the long-term financial stability of the SoL Center.

Programming

Strategic goal: Maintain a quality product

Organizational objectives:

- Cultivate instructors capable of shaping the audience.
- Cultivate instructors capable of attracting the audience.
- Offer multi-instructor courses utilizing the strength of an overall course coordinator. (i.e. gardening class)
- Identify challenging curriculum resources.
- Cultivate course syllabus (instructor developed).
- Cultivate instructors with professional religious degrees.
- Cultivate instructors with demonstrated ability to relate to participants.
- Develop wish list of those who might be best to teach. Develop strategies to attract them to the SoL Center.
- Cultivate instructors with technical competence in their field.
- Design terms around themes or clusters of courses to promote balance.
- Support courses with "outreach" or off-site classroom elements.
- Consider cost of text in determining content and syllabus.

Public Relations

Strategic goal: Shape image, public knowledge and perception of the SoL Center.

Organizational objectives:

- Develop membership program featuring both Church and individual memberships. Membership fee would support SoL operations while promoting increasing public image of the Center.
- Develop benefits structure for membership program defining the individual and group member benefits such as opportunities for delegates to serve on SoL committees, scholarship moneys available to each Church member.
- Cultivate special event opportunities for individual and church members, volunteers, Board members, instructors. These opportunities could serve as celebration, announcement, and new program previews.

Partnerships

Strategic goal: Promote strategic partnerships to expand opportunities and share expenses/risk. (Seek long-term program opportunities. What can we offer together that we cannot offer individually?)

Organizational objectives:

- Opportunities and alliances to support on-going development of high quality programs including but not limited to:
 - Naomi Nye
 - Lilly Foundation
 - Tobin Foundation
 - Pew Charitable Foundation
 - Austin Presbyterian Theological Seminary
 - Templeton Foundation
 - Fund for Theological Foundation
 - Oblate
 - Texas Lutheran
 - Calvin Institute
 - Trull Foundation

Notes: At fall board meeting invite discussion including questions such as: what collaborations make sense? who would cultivate? who shall we strategically pursue for programming in 2003?

Operations

Strategic goal: Recruit and use volunteer resources

Organizational objectives:

Develop clear task descriptions for volunteer activities.

Develop course session monitors, mailing assistance, course coordinators, publicity volunteers, demographic volunteer, new committee members, Board members, registration processing.

Cultivate individual membership opportunities.

Recruit university interns.

Need Areas:

Volunteer Needs:

Ambassador:

Task/Time: Session monitors responsible for taking attendance, check-in, walk-in registrations, nametags, refreshments, A/V equipment, set-up, break-down, collecting evaluations. Duration of course.

Where: SoL Center

When: Course sessions

Who: Build volunteer pool of ambassadors. Host training session in fall to include tour of facilities, sign up, coverage/absences.

Volunteer Coordinator:

Task/Time: Point person to recruit, connect people and tasks. Effective people person, networking skills, volunteer management, recognition, track volunteer hours, support training needs.

Where: Phone, email, SoL Center.

When: Flexible schedule, perhaps past board member. Serve on operations committee.

Publicity:

Task/Time: Regular dissemination of information about classes, connect press releases with community calendars, media resources, church and organizational newsletters.

Where: Phone, email

When: Flexible schedule, PR experience, willing to serve on related committee.

Additional Needs:

Assistance with mailing
Course coordinators
Board members and committee members
Registration processing
Internships
Volunteer task descriptions
Volunteer management
Speakers Bureau

Publicity

Strategic goal: Cultivate and utilize all media resources to disseminate information and recruit new participants.

Organizational Objectives:

Contact public relations expertise to consider alternatives.
Explore the use of free public calendars.
Build list of organizational newsletter publication dates in order to send direct listings in a timely manner.
Plan an opportunity for special event coverage 3 times each year.
Maximize the use of technology resources including email and website.

Need Areas:

Committee members:

Task/Time: Host a single focus group discussion with the intent of gathering information, resource ideas and further contacts for implementing media goals.

Where: UPC/Late October 3:30 p.m.

Who: Catherine Burke, Debbie Fitzmeyer, Cheryl Jividen, Express News – religion section, Marjory George, Gordon Atkinson (Website design) Sherry Rosen, Kevin Donahue, Sharon Schweitzer – Trinity, Gerry Seaman.

How: Deb Buehler to facilitate discussion and brainstorming for making media inroads on behalf of the SoL Center. A potential outcome might include interesting one or two participants to become Publicity Committee members.

Volunteer:

Task/Time: Assemble master lists, distribute press releases and postings aligned with newsletter deadlines, contact media.

Where: Phone, fax, email

When: Flexible, on regular schedule

(7/12/02)