



Church Council & Policy Board Retreat

October 10, 2015

8:30am – 4:30pm

Morning Agenda

- Welcome, opening words, introductions & agenda review
- Read, review and affirm covenant
- Safety Presentation
- Review of Governance Org Chart
- Review of expectations of Board and Council members
- Mid-Morning Break
- Resource Team presentations
 - Long-Range Planning
 - Peace Building Team
 - Canvass

Welcome



Our Mission

We unite to provide a hospitable sanctuary,
In this time and place,
For seeking the sources of spiritual strength,
Enabling people, in the church and in the world,
To work for love, decency, tolerance, and justice.

Who We Are

We the members of the First Unitarian Church of St. Louis are a community of memory, hope, and reverence.

We covenant with each other to be inclusive, religiously non-creedal, and dedicated to freedom of belief and conscience.

What We Do

-  We gather to offer a humanizing community for individuals of all ages which supports and encourages each person's life-long moral and spiritual growth, and the continued fearless examination of life's deep and important issues.
-  We seek to educate the human conscience to live our faith daily and to help one another make the world a better place to live.
-  Together we celebrate life's great moments and its important passages through inspiring worship and caring fellowship.

Opening Words

Introductions

- Name
- Role
- Pre-Work Questions:
 - **WHY** do you choose to attend First Unitarian Church of St. Louis?
 - **WHY** have you chosen to serve on the Board/Council?
 - **HOW** do you put your “WHYs” into action? This may include how you approach personal interactions, guiding principles, etc.

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Afternoon Agenda

- Board and Council Priorities for the year
- Share and affinitize pre-work
- Break-out sessions – draft mission statements and elevator speeches for Board and Council
- Review and share mission statements
- Priorities + Mission Statements = Action Plans
- Afternoon Break
- Open Air
- Closing Words & Thanks
- Assisted break-down and cleanup

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Policy Board and Church Council Statement of Covenant

We covenant to respect and care for each other, the congregation and ourselves.

We promise to demonstrate leadership and commitment to the congregation by our example.

We promise to support our church ministers and staff so that their efforts can be most productive.

We promise to try to discover what is best for our church as a whole, not what may be best for us or a small group of the congregation.

As members of the Policy Board and Church Council we will:

- Be direct, honest, transparent and accountable with each other and the congregation; communicate the decisions and direction of the Board and Council.
- Listen with an open, non-judgmental mind to the words and ideas of the congregation, the Policy Board and Church Council.
- Assume ambiguity: clarify early and often.
- Discuss, debate and disagree openly in meetings while listening without interrupting or talking over others.
- Support the final decisions of the Policy Board and Church Council; and maintain the integrity of both.
- Share responsibility and accountability for the decisions, actions and accomplishments of our Church.
- Actively support and encourage implementation of the Governance recommendations in the 2015-2016 church year.
- Forgive each other and ourselves when we make mistakes.

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Greeting and Safety for Yourself & the Congregation

As the greeter on a Sunday morning you also play an important role in making our church as safe as possible for the congregation.

Here are a few tips and reminders!



Greeting and Safety for Yourself & the Congregation

- Door must be monitored at all times.
- Please do not leave unlocked door unattended.



When People ask for Assistance or Food

- **Welcome** and chat with our neighbors who come for a cup of coffee.
- **Invite** people to the worship service or to have a cup of coffee.
- We are unable to provide food (this includes sandwiches on Sandwich Making Sundays) or cash assistance to individuals.
- Also, the minister is not available on Sunday mornings for one on one conversations.
- If people come asking to use a restroom, please direct them to the ones off Fellowship Hall.
- Please see 'Visitors Seeking Direct Assistance' guidelines for more information.



Aggressive Behavior and/or Mental Health First Aid

- If someone presents with a mental health issue — erratic or aggressive behavior — remain calm and do not argue with the person.
- Take threats or warnings seriously and seek outside help immediately.
- Speak to the person slowly and confidently.
- Do not respond in a hostile or challenging manner.
- Do not argue.
- If you should feel threatened, always position yourself so that you have a way to exit.
- Have your cell in an easily accessible place.
- Ask for help.

**Refer to the
Safety Manual
for more complete
information about
various conditions.**

Law Enforcement

- Should you need to call Law Enforcement be aware that this may exacerbate the situation.
- This does not mean that you should not call – just be aware of how the person may react.
- *If you do call law enforcement, inform them that you believe this to be a mental health problem.*
- *If you think drugs or alcohol may have induced the aggression, inform them of this as well.*
- *Tell law enforcement if you are aware that the person is armed.*



Physical Medical Emergencies

- First Aid kits are kept in the kitchen and in the janitor's closet next to the women's room on the first floor of the Religious Education wing. These can be used for minor cuts, burns, scrapes, etc.
- Any injuries (no matter how minor) to children will be reported to parents or care givers.
- In the case of falls, keep the person still and comfortable until a medical professional can assess the extent of possible injury. Call 911 if it seems warranted.
- Fill out an incident report whenever there is an event that could involve injury.



Heart Attacks, Sudden Cardiac Arrest or Shock

1. Check for breathing, pulse and medical alert bracelet.
2. *****Call 911 immediately*****
3. Ask for help to be sent, stay on the line and follow instructions.
4. Attempt to locate someone who is trained in CPR (if available) -- medical personnel, staff, etc. Call out if necessary.
5. If you are a trained rescuer, begin CPR as taught.
6. Send someone to get the AED - It is located in the foyer by the alarm system.
7. Have one person continue chest compressions while another starts the AED.
8. Follow the instructions from the AED



Evacuations and Shelter in Place

Fire

- Always evacuate the building should the alarm go off.
- Call 911.
- Open both of the front doors.
- Direct people to the parking lot.
- Do not use elevator.
- Children will go to Kingshighway lawn area.



Severe Weather

- In the event of adverse weather, but no immediate warnings, the greeter should monitor the weather via a weather radio.
- If through observation and warnings being issued on the radio it seems prudent for people in the sanctuary to be evacuated or to take cover, the greeter should inform an usher and the usher will go forward and inform the minister or speaker.
- At that point, the procedures for a tornado evacuation will be implemented.

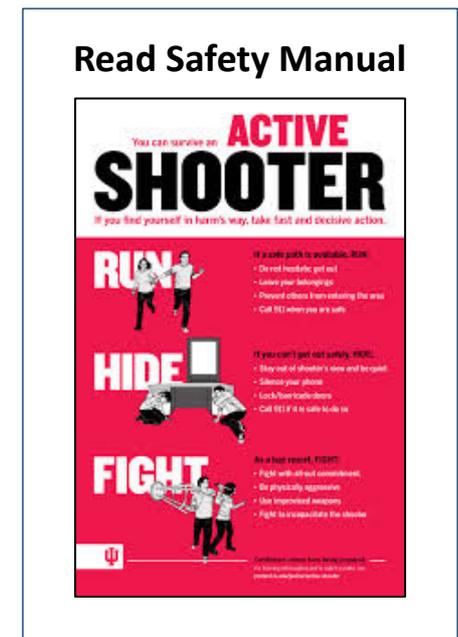
Safety Manual

- The church building is complicated and there are a variety of events on a typical Sunday morning, so there is no one easy version to evacuate the building or to shelter in place.
- Please familiarize yourself with the Safety Manual, which has plans for a variety of contingencies.
- Feel confident in speaking as a leader and authority figure in the congregation.



Dangerous Intruder

- In the event of a physically threatening intruder (guns, knives, etc) experts suggest that people Run, Hide or Fight (in that order).
- Greeters, ushers, teachers, staff, etc. will need to assess the situation and guide people to the proper course of action.
- Call 911 immediately and then silence cell phone.
- Walkie talkies are on the greeter table to inform classroom teachers to lock down their rooms. Yelling is also an option.
- If feasible help people exit – remind them to walk quickly, but calmly with hands visible.



Remember

- First Unitarian Church of St. Louis strives to be a sanctuary in all ways: spiritually, in relationships, and physically.
- Safety experts agree that the first step in physical safety is to be aware of your surroundings and anticipate what you would do in the different situations we have discussed.
- **Be Prepared!**



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Governance Org Chart

- Why
 - Help to differentiate between Board and Council roles & responsibilities
 - Put a face to the name
 - Make information visible and easily accessible
- How
 - Governance Task Force org chart
 - Committee list
 - Photos
- What . . .

Church Governance Structure 2015 - 2016

Church Officers

Policy Board



Board President
Tiffany Sewell



Board Vice President
Emily Colton



Treasurer
Jim Bosnick



Secretary
Erin Milligan

Church Council



Council Chair
Mark Bruns

Board Liaisons



Capital Budget Planning
Ronan Wallace



Committee on Ministry
Tony Fathman



Health Congregations / Peace Building
Kathy Wire



Long Range Planning
Larry Dusenbery

Talent Engagement & Development
OPEN

Council Cluster Coordinators



Facilities Work Group
Karen Siegrist



Membership
Brittany Hagedorn



Outreach & Social Action
Charlie Kindlebuger



Programming
Thomas Perchlik

Arts & Aesthetics
Facilities Committee

Care & Concern
Covenant Groups
Feasts & Festivals

CAEF
Holy Ground
Knitting Ministries

Administration
Archives
Clark Lecture
Denominational Affairs
ERDE
Family Activities

Canvass Committee
Chalice Lighters

Green Sanctuary
Landscaping

Hospitality
Membership
PR/Marketing

Partner Church
Sandwich Making
Social Responsibility

Flowers
Learned Bookshop
Learned Library
Lewis Intern
Lifespan Faith
Development

Finance
Fundraising

Women's Alliance
Young Adults Group

UU Services
Welcoming
Congregation

Music
Personnel
Staff
Ushers
Worship Committee

Insurance
Long Range Planning

Stewardship
Open

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Expectations of Board and Council Members

Follow the covenants – Church and Board/Council

Live the mission statements – Church and Board/Council

Be **present** on Sundays

Attend meetings or send backup

Engage with your clusters, committees, interest groups

Expectations of Board and Council Members

Help identify future leaders – next year and beyond

Communicate with members and friends

Introduce yourself to visitors

Lend a hand

Fulfill other responsibilities – greeter, etc.

Coming soon to a committee near you . . .

- Policy Manual Work

- Why: demonstrated need for written policies regarding a number of church functions
- How: work with the involved committees to develop policies for Board approval
- What: expect follow-up and requests for help

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Mid-Morning Break

The Monkey and the Fish

A typhoon had temporarily stranded a monkey on an island. In a secure, protected place on the shore, while waiting for the raging waters to recede, he spotted a fish swimming against the current. It seemed obvious to the monkey that the fish was struggling and in need of assistance. Being of kind heart, the monkey resolved to help the fish.

A tree precariously dangled over the spot where the fish seemed to be struggling. At considerable risk to himself, the monkey moved far out on a limb, reached down and snatched the fish from the threatening waters. Immediately scurrying back to the safety of his shelter, he carefully laid the fish on dry ground. For a few moments the fish showed excitement, but soon settled into a peaceful rest.

Joy and satisfaction swelled inside the monkey. He had successfully helped another creature.

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Long Range Planning at First Unitarian St. Louis

Policy Board and Church Council Retreat



The Long Range Planning Committee

- Emily Colton
- Charles Deal
- Larry Dusenbery - Chair
- Tony Fathman
- Woody Sullivan
- Rev Thomas Perchlik

Our Mission

- Support the health and the growth of the church by providing a structured process for long range planning, which includes:
 - **listening** to and fostering discussion amongst the congregation, community connections, and stakeholders,
 - **synthesizing and articulating** a vision grounded in the church's mission and values, building on its strengths and aspirations, and
 - **recommending** objectives, goals, strategies and priorities to bring the vision to fruition

WHY are we doing a long Range Plan?

- IT'S TIME. Our last formal long range plan was in 1993. "Blueprint 2000".
- Provides a structured way to talk about our future, our direction, our vision of what we want our church to be.
- Provides a focus for decision making that instills peace building, thus avoiding disagreement and conflict.
- Affects the long term life of church.
- Provides a roadmap of how to get where we want to go.

WHAT is Long Range Planning?

- An envisioning process
- Defines our Goals over the next 3-5 years
- Creating plans to achieve our goals.
- Process to prioritize and monitor plans
- Cyclical and Continual

OUR PROCESS

How we get to where we want to be



Discovery

Identify our **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats (SWOT), our Hopes, Ideas, Vision, Dreams from our:

- Congregation
- Governance –Board and Council
- Committees/Teams/Programs
- Ministry/Staff
- Outside community

Analysis

- Summarize information.
 - Integrate individual items.
 - Organize into Major Areas/Themes.
- Research background on ideas.
 - costs
 - labor
 - interested/invested parties
 - impact/cost of not doing
- Develop Summary Document for Board/Minister Review.
 - “SMART” GOALS/IDEAS:
 - SPECIFIC, MEASURABLE, ACHIEVABLE, with suggestions for who might be RESPONSIBLE for implementation, and include suggested TIME for implementation.
 - Include ideas that do not fit the SMART criteria, but are desirable or noteworthy.

KEY ELEMENTS OF THE CHURCH



Major Threads: Stewardship



Major Threads: Community



Initial Strategy Development

- Board/Council reviews Goals
 - Decide which will be the priorities for the coming year, three year to five years
- Board/Council engages in “RACI” development of top priorities.
 - Who is **R**esponsible, to whom will they be **A**ccountable, with whom will they **C**onsult, and how will they be **I**nformed about parameters and changes?

Consensus Building

- LRP Committee helps Board/Council share plans with Committee Leaders and Congregation.
- Create Task Forces to review and develop ideas, when needed.

Plan Development and Implementation

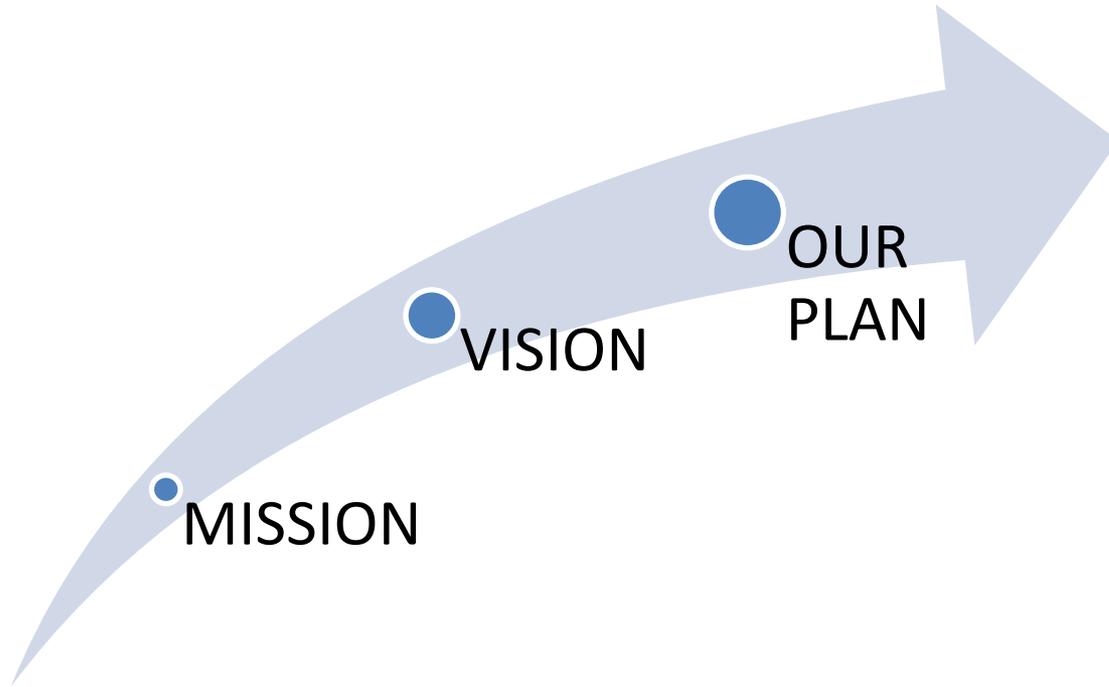
- Board/Council empowers people to move forward on projects.
- Board/Council maintains flow of information and accountability.

Return to Development Phase

- LRP compiles lists of achievements.
- LRP advises Leaders to evaluate the success, problems or quality of their work.
- LRP actively gathers new ideas every year.

Proposed Timeline

Dates	PHASE	Deliverable	Responsibility	Involvement
Fall 2015 (Oct) Board/Council meeting	Analysis	Analysis Summary doc of smart goals/ ideas	Long Range Planning Committee (LRPC)	LRPC
Fall /winter 2015 -16 (Nov-Jan)	Strategy Development	Prioritized “SMART “ goals	Board/ Council Minister	Committees/ Teams
Winter/Spring 2016 (Feb-April)	Strategy Development	“RACI” plans	Board/ Council	Committees/ Teams/LRPC
Jan 23, 2016 Midwinter Mtg	Consensus Building	“SMART” goals	Board/LRPC	LRPC/Board/ Council/ Congregation
Spring, 2016	Plan Development/ Implementation	Approve/ Distribute plans	LRPC/Board/ Council	Board/Council/ Committees
May 15,2016 Annual Mtg	Plan Implementation	Formal LRP plan doc	Board/LRPC	Board/LRPC/ Congregation



QUESTIONS??

Peace Building Team

- Handouts provided

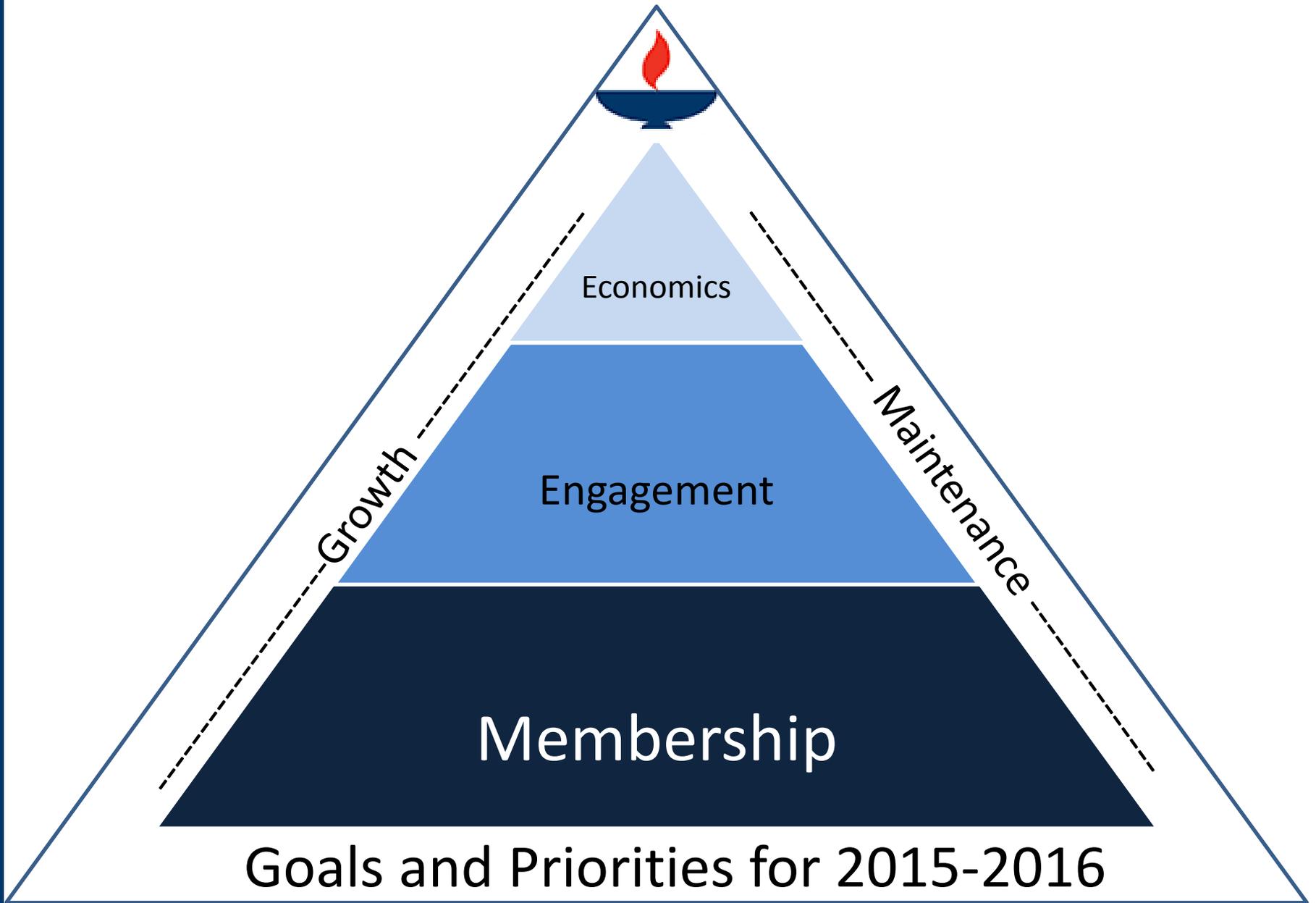
Canvass Update

- Verbal

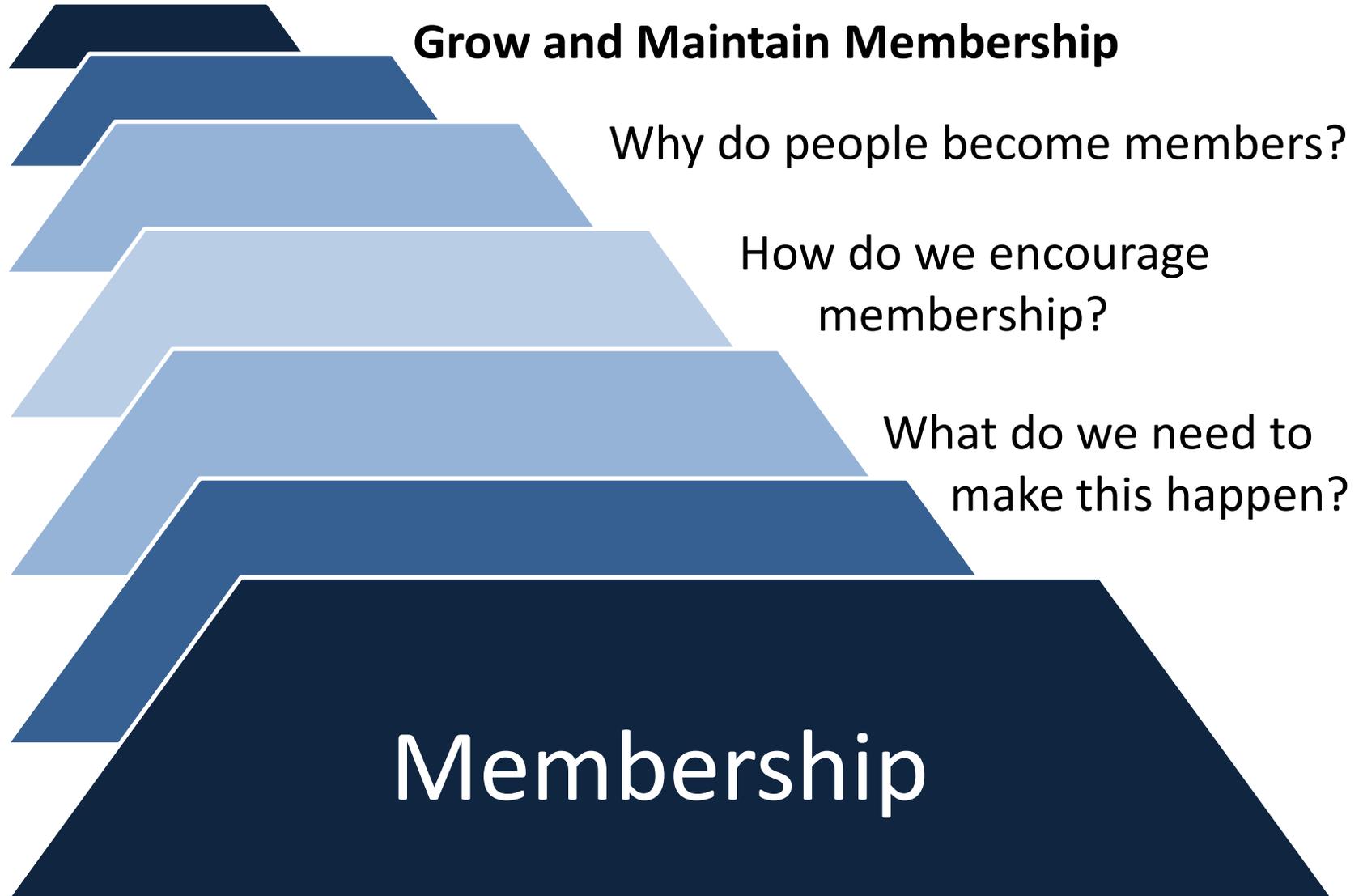
LUNCH

Afternoon Agenda

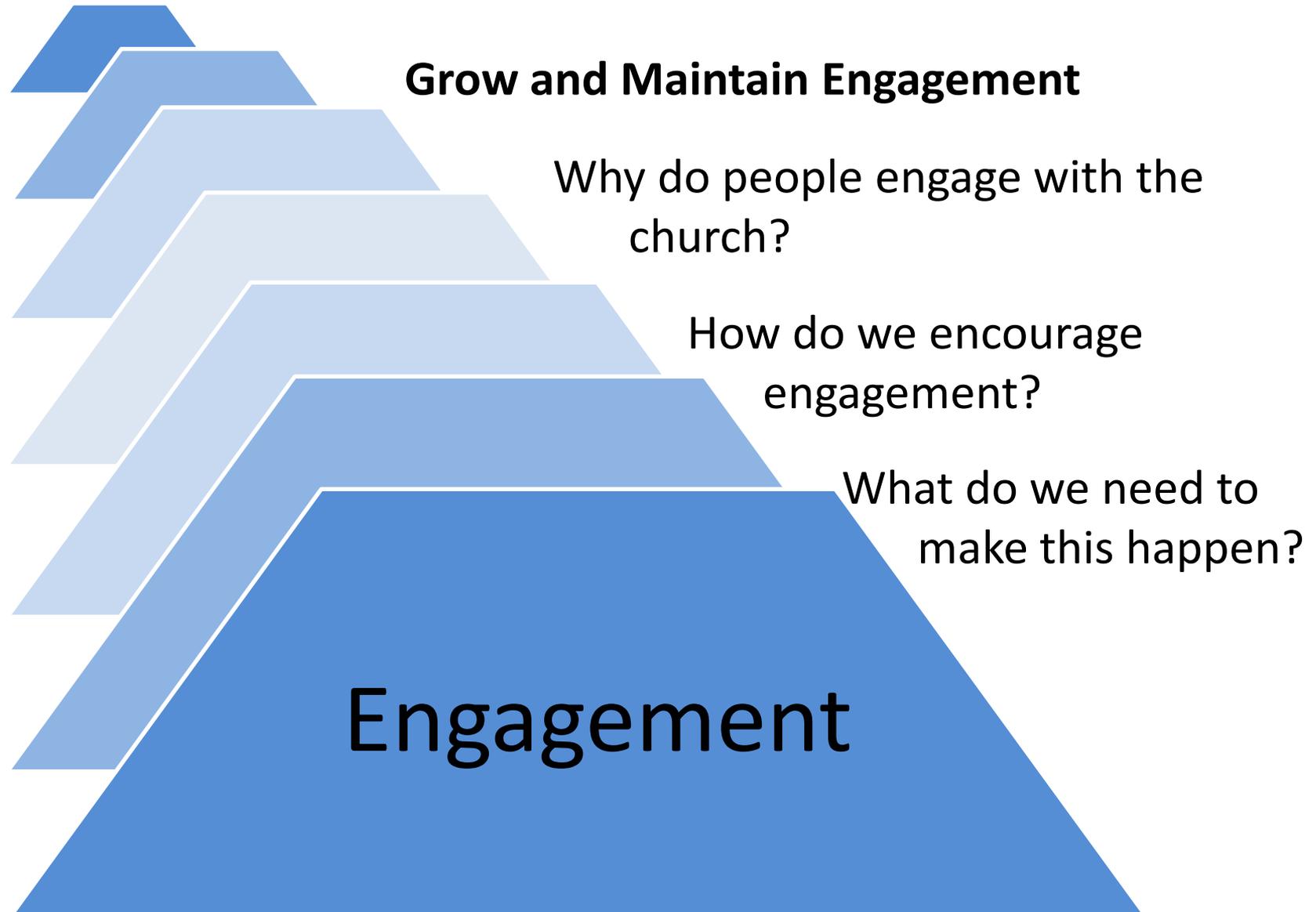
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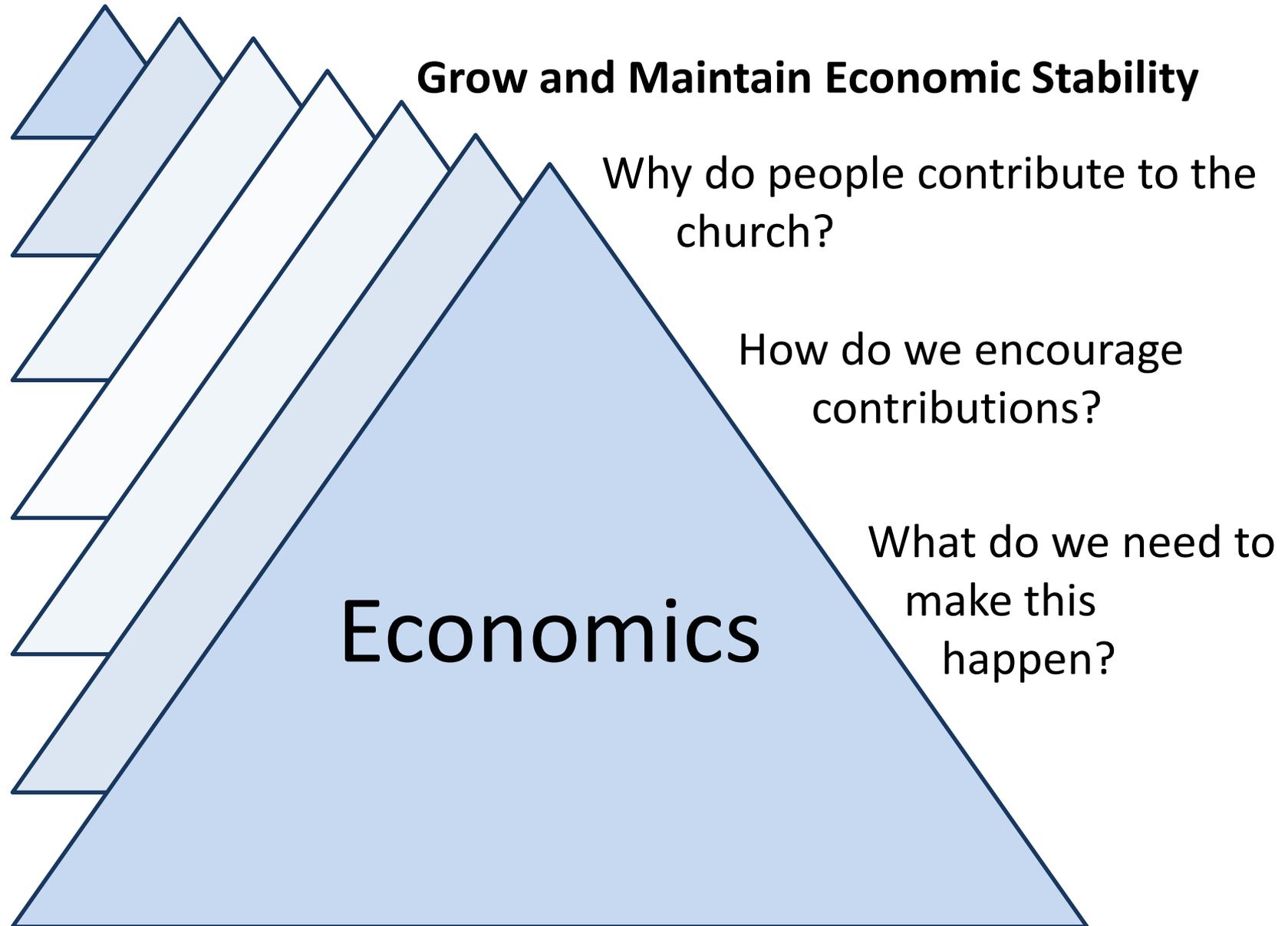
Goals and Priorities for 2015-2016



Goals and Priorities for 2015-2016



Goals and Priorities for 2015-2016



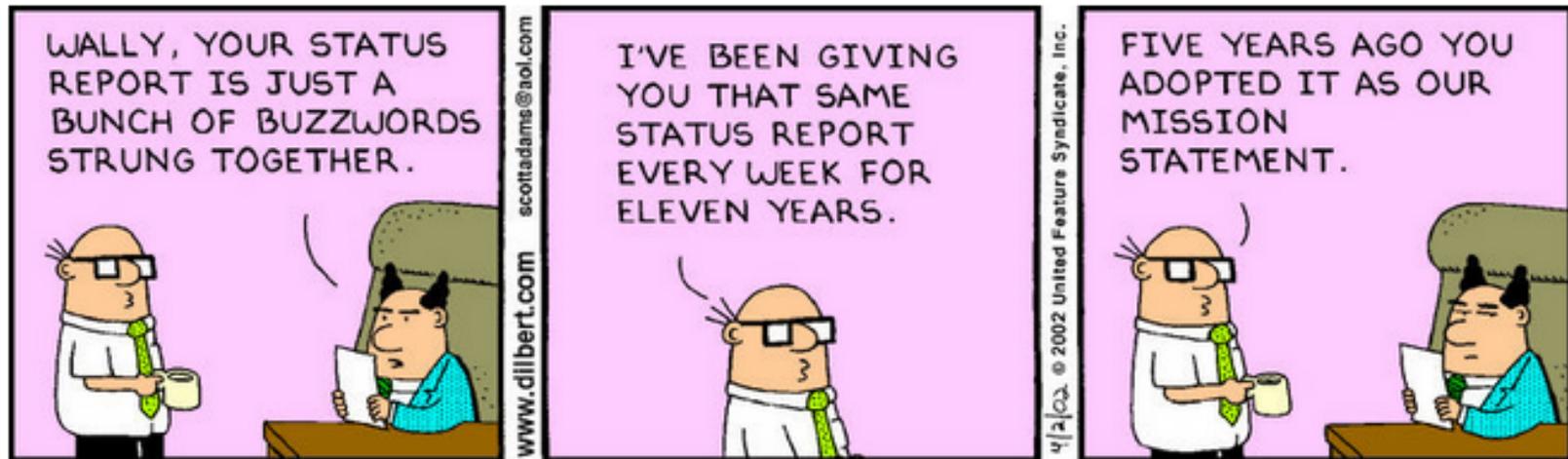
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Mission Statements



Mission Statements – 1, 2, 3

1. Purpose Statement

- Clearly states what your group seeks to accomplish:
 - Why does your group exist?
 - What is the ultimate result of your work?
- Purpose statements usually include two phrases:
 - an infinitive that indicates a change in status, such as *to increase*, *to decrease*, *to prevent*, *to eliminate*, and
 - an identification of the problem or condition to be changed.

Mission Statements – 1, 2, 3

2. Business Statement

- Outlines the "business(es)" (i.e., activities or programs) your group chooses in order to pursue its purpose.
- Specifically, you must answer, "What activity are we going to do to accomplish our purpose?"
- Business statements often include the verb "to provide" or link a purpose statement with the words "by" or "through."

Mission Statements – 1, 2, 3

3. Values

- Beliefs which your group's members hold in common and endeavor to put into practice.
- The values guide your organization's members in performing their work.
- Specifically, you should ask, "What are the basic beliefs that we share as an group?"

Mission Statements – 1 + 2 + 3

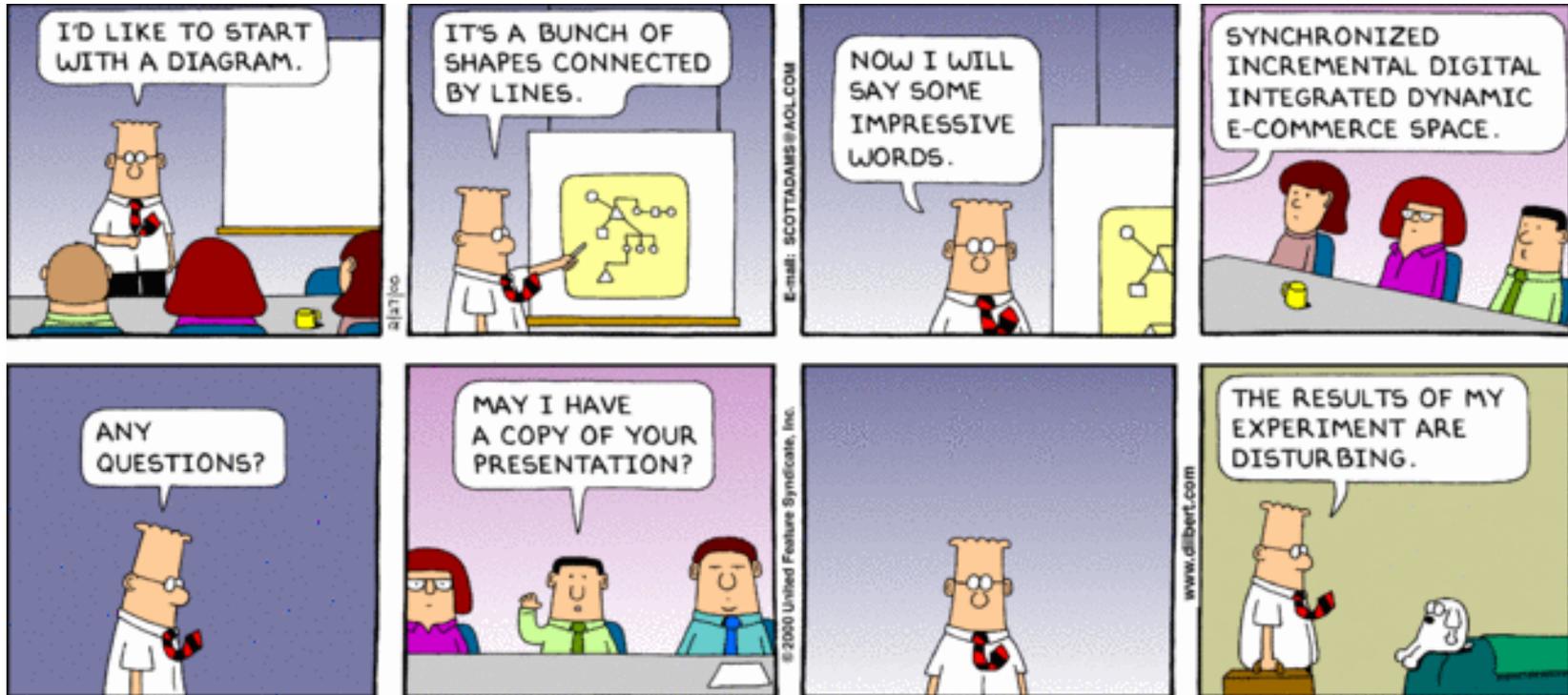
Purpose + **Business** + **Values**

Examples

“The YMCA of San Francisco, based in Judeo-Christian heritage, seeks to enhance the lives of all people through programs designed to develop spirit, mind and body.”

“United Community Center is a 501(c)(3) human service agency providing emergency assistance, daycare, social services and recreational activities for low-income children and families at risk in inner city Atlanta, Georgia.”

Elevator Speech



Elevator Speech - basics

1. What are we doing?
2. Why are we doing it?
3. Why are we doing it NOW?
4. Where are we going (vision)
5. How you can help

Guidelines

Duration: Not longer than 25 to 30 seconds

Word Count: Approximately 80 to 90 words

Sentence Count: Eight to ten sentences

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Policy Board

Mission Statement / Elevator Speech

- The Policy Board of First Unitarian Church, in service to the congregation, is responsible for guiding the long-term vision and mission of the church while creating enthusiasm for its work and assuming fiduciary responsibility through creation and maintenance of governing policies.
- The Policy Board is a group of elected church members responsible for fostering a culture of celebration and inclusion at First Unitarian church of St. Louis. Our focus is on the long-term health and development of our congregation, minister and staff members. We are accountable for managing the infrastructure of our church through setting and communicating policies, overseeing church finances and supporting the work of the Church Council, committees and other work groups.
Have you heard about . . . ?

Church Council

Mission Statement / Elevator Speech

- The Church Council of First Unitarian Church, in the interest of transparency, stewardship, and unity will help coordinate and communicate the activities of the committees in order to build a stronger and more vibrant church community.
- The Church Council meets monthly to:
 - Discuss committee activities and needs
 - Communicate with and among clusters
 - Help implement and communicate Policy Board decisions
 - Celebrate accomplishments
 - Focus on this year and the month to month activities

We do this to build bridges and tear down barriers and to build effective programs that will, in turn, create a stronger church community and free up the Policy Board for long range planning. You can help be getting actively involved with programs and help communicate the needs of the church.

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Goals and Priorities for 2015-2016

- Why do people become members?
 - Nature of spiritual experience – noncredal and open
 - Intellectual exercise and growth
 - Social justice work
 - Religious education
 - Social community and connections



Membership

Goals and Priorities for 2015-2016

- How do we encourage membership?
 - Community
 - Mission
 - Energy and Excitement
 - Paths to membership, affirm membership
 - Community awareness and pride
 - Friendraising
 - Evangelism



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Membership

Goals and Priorities for 2015-2016

- What do we need to make this happen?

Policy Board

- Ensure coverage for “signing Sundays”
- Process for notification/communication of major events (“wheel of life”)
- Outreach and personal invitations to attend

Church Council

- Develop process to:
 - Recognize, announce, celebrate new members
 - New member bio/profile/pic (monthly|yearly)
- Develop process to:
 - Recognize legacy members
 - Recognize special membership anniversaries
 - Recognize special events
- Outreach and personal invitations
- PR – West End Word, digital presence

Membership

Goals and Priorities for 2015-2016

- Why do people engage with the church?
 - Community/belonging
 - Right thing to give back
 - Social pressure



Engagement

Goals and Priorities for 2015-2016

- How do we encourage engagement?
 - Talk & ask
 - Friendly
 - Equitable workload
 - Recognition
 - Communicate opportunities
 - Match talents to needs



Engagement

Goals and Priorities for 2015-2016

- What do we need to make this happen?

Policy Board

- Position descriptions with term limits
- Visitor follow-up via email/letter from Minister/Board President
- Volunteer database including anticipated exit dates

Church Council

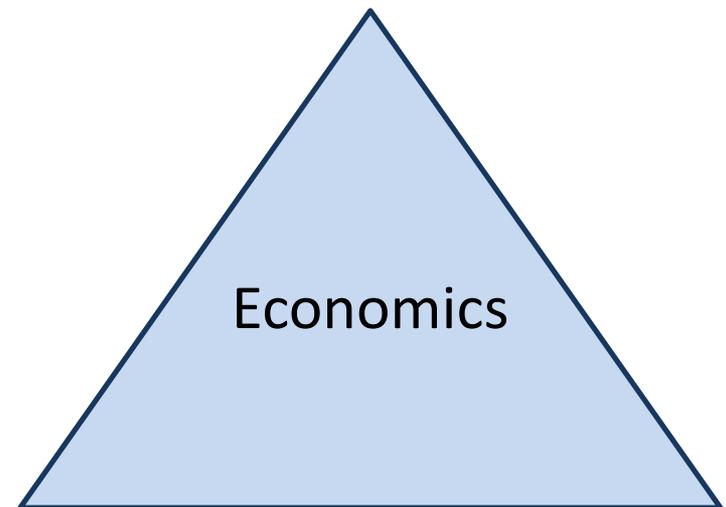
- Position Descriptions
- New member mentor – explain responsibilities of membership
- Youth program “secret pal” / “secret Santa”
- Downsize committees – increase scarcity, drive desire to participate
- “Bring your laptop to church” day



Engagement

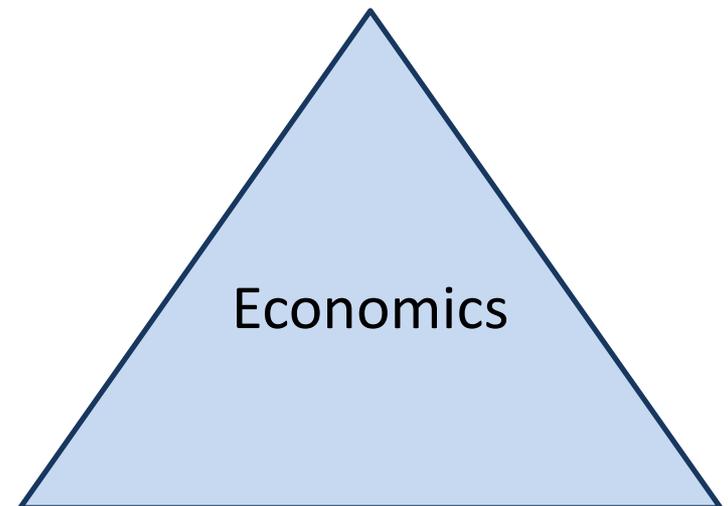
Goals and Priorities for 2015-2016

- Why do people contribute to First UU?
 - Project driven
 - Pragmatic
 - Philanthropy, generosity, legacy
 - Value, purpose, missional
 - Resources



Goals and Priorities for 2015-2016

- How do we encourage contributions?
 - Education
 - Ask
 - Specify how donations can be / are used, e.g. sponsoring specific projects
 - Make it simple and enjoyable
 - Recognize donors (or anonymity)



Goals and Priorities for 2015-2016

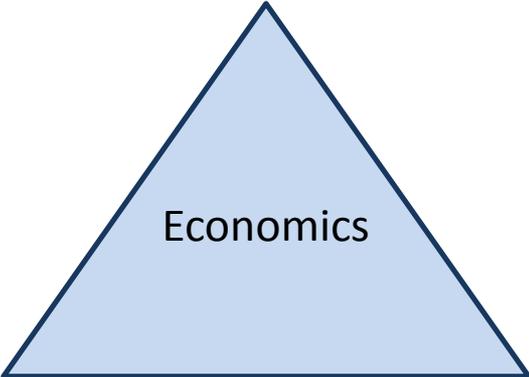
- What do we need to make this happen?

Policy Board

- Analyze financial aspect of committee consolidation
- “Church Finance for Dummies”
- Peace Building Team – discussion on Bequeathments

Church Council

- Fundraisers – trivia, auction, movie nights, scavenger hunt
- Process improvement – Canvass
 - Year-round effort
 - Tie to education
 - Tie to membership responsibilities
 - Fill emotional need
 - Incremental giving
 - Advertise online Donation
 - Share the data
 - Legacy giving/bequeathments
- Encourage unrestricted giving
- Use restricted fund groups to bring in visitors



Economics

(continued on next slide)

Goals and Priorities for 2015-2016

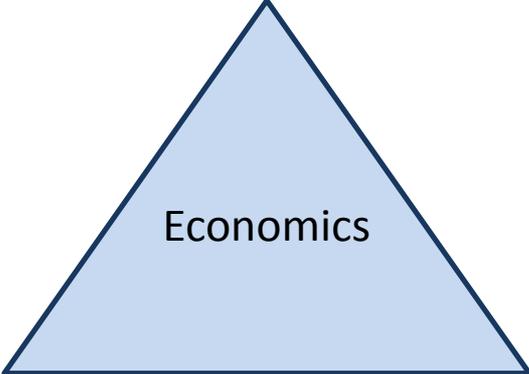
- What do we need to make this happen?

Policy Board

- Examine current restricted funds and determine if funds are in the best “home”
- Build outside partnerships to share financial burden

Church Council

- Link personal lives/successes -> abundance -> giving
- Build outside partnerships
- Possibility for other fundraising partnerships (eScrips, eScrips online fundraising)
 - Establish, share, promote
- Employer match



Economics

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Afternoon Break

The Parable of Brother Leo

A legend tells of a French monastery known throughout Europe for the extraordinary leadership of a man known only as Brother Leo. Several monks began a pilgrimage to visit Brother Leo to learn from him. Almost immediately, they began to bicker about who should do various chores.

On the third day they met another monk going to the monastery, and he joined them. This monk never complained or shirked a duty, and whenever the others would fight over a chore, he would gracefully volunteer and do it himself. By the last day, the others were following his example, and from then on they worked together smoothly.

When they reached the monastery and asked to see Brother Leo, the man who greeted them laughed.

'But our brother is among you!' And he pointed to the fellow who had joined them.

Afternoon Agenda

- Share and affinitize pre-work
- Break-Out Sessions – draft mission statements and elevator speeches for Board and Council
- Review and share mission statements
- Priorities + Mission Statements = Action Plans
- Afternoon Break
- Open Air
- Closing Words & Thanks
- Assisted break-down and Cleanup

Open Air

- Fiscal Year plan review; must include Long Range Planning Team and Finance committee
- Next steps: Board and Council to review “action plan” items, prioritize and communicate to Long Range Planning Team

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