

# Introduction to Chutzpah Workshop Report

## Overview

Bedford United Church (BUC), like many other churches across the province, country and continent, has been for some time experiencing a decline in membership, funding, and volunteerism. BUC is determined to remain viable and relevant beyond the five year financial viability window indicated by current trends. To get a start on this, Council established and empowered the Sustainable Future Team (SFT) at the AGM in March 2023. The Team carried out various activities throughout its first year though progress was difficult to mark. More information on Year 1 journey of the SFT will be expanded upon in a separate document and will constitute a record for both Council and the congregation at large.

To move the work of the SFT forward, a consultant - Chutzpah Consulting - was hired to carry out workshops to address the challenges facing the team and provide clarity on shorter and longer term SFT priorities going forward.

## Background

Conversations with Chutzpah Consulting began in July 2023 as SFT explored various consulting options to help us move forward strategically. Financial and time constraints of both BUC and the consultants themselves were critical factors. At that time, both SFT and Council had approved the content for a “roadmap” which outlined the overall strategy and visioning process. It was developed by the SFT sub-working group of Mary Belliveau, Bob Hodgson, Linda Stewart, and Janice Reid. Despite receiving approval, the underlying constructs were not well-understood as evidenced in many ways in the working of the SFT and notably through the fall workshops reported on here.

The following is a report from Chutzpah Consulting summarizing the results of the workshops held in November and December 2023. This Introduction is a companion piece that complements and provides further context to information contained in the report. The audience for this document is those who participated in the sessions. Invitations were sent to members of Council, BUC Ministry Team Leads, and members of the SFT. Participation was on a volunteer basis and 24 individuals participated out of a potential 30 volunteers. Except for the Supply Lead Minister, staff were not included in these sessions.

## The Report

The report contains, among other things, short term and long term priorities and elements of a potential vision to present to the congregation. It is important to read this report with these filters:

- The thoughts captured represent only those who volunteered to attend.
- Individuals presented their own thoughts and were not necessarily representing the cumulative and consolidated input of their team or others.
- Some individuals were new to the work of the SFT and so had limited context for their comments during the workshops.

- The comments are reported verbatim, and thus do not represent any culmination of consultation or discussion.
- It had appeared to the consultant that the originally defined areas of focus within SFT were formalized work groups and much more engaged than they really were.
- The report makes assumptions that individuals attending the workshops had the final say on priorities and vision. However, further consultation is needed to collect additional perspectives and then validate whether these suggestions really constitute priorities that align with Council, BUC teams, and SFT.

## **Observations**

The workshops provided tremendous value in understanding how very difficult transformative change can be to understand and to bring about. The process also highlighted how critical communication and engagement is in moving forward. For example, individuals reported feeling overwhelmed and lacking clarity on the tasks before them. Some people weren't sure they were in the right group when they chose to participate in either or both of the short term and long term workshops. In reality, we found that the long term work or more specifically the strategy and vision work – the transformative stuff - is not understood by many, be it on Council, SFT or Ministry Team Leads.

It is also worth noting that although the consultant references that this report will help us move forward with strategic planning there is actually very little here that would assist us in taking those next steps other than steps being listed on pages 11 and 12.

The consultant very appropriately makes a recommendation for co-coordinators for both the short term and long term groups. This was raised during the workshops and participants were invited to offer for these roles. None came forward at that time.

## **Conclusion**

This report captures thoughts and vision of what workshop participants would like to see happen to and for BUC in the short and in the longer term. Council, the SFT and the congregation will consider what priorities to focus on and the SFT and/or other groups will be shaped according to what resourcing it will take to make the priorities a reality.

Submitted by Mary Belliveau, Andrea McQuillin and Janice Reid

February 2024

# **Sustaining & Transforming Bedford United Church**

## **Final Report for Phase I**

Prepared by:

Chutzpah Consulting,  
January 22nd, 2024



# Table of Contents

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<b>Introduction</b>	<b>2</b>
<b>Session 1</b>	<b>3</b>
<b>Session 2</b>	<b>8</b>
<b>Session 3</b>	<b>9</b>
<b>Conclusion</b>	<b>11</b>
<b>Recommendations</b>	<b>11</b>
<b>Appendices</b>	<b>16</b>
<b>Appendix A</b>	
<b>Appendix B</b>	
<b>Appendix C</b>	

## Introduction

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Chutzpah Consulting was hired by Bedford United Church (BUC) to provide support with a strategic planning process that could include support for short-term goals but also longer term, transformation of the organization to determine and plan for a future direction that is sustainable in terms of relevance, effort, financially, and that could be synthesized into a larger Congregational Vision to be confirmed at BUC's AGM in 2024.

The goals for this process were:

- Consult with Council members, members of the Sustainable Futures Steering Committee, Advisory Groups and related Working Groups as needed,
- Review relevant documents as needed, and
- Develop a strategic / transformative planning process including environmental scan; review of vision, mission and values; and development of key focus areas and priorities in complement to work that has already been done and structures created.

Phase I of this process included:

- 3 meetings / workshops (online), one with full Council and Steering Committee then one short-term focused and one longer-term focused,
- Clarification of how communication amongst groups currently works, what is working, any worries or concerns, and any changes that might be needed,
- Clarification of current group dynamics, what's working, any worries or concerns, what might need to change, and
- A Report on Phase I including Recommendations and ideas for future work to help move the organization forward towards its goals of sustainability and transformation.

The invitation of people to attend these groups was coordinated by the Sustainable Futures Team (SFT) and were held online during November and December 2023. The people included were from the Sustainable Futures Steering Committee, Advisory Groups and related Working Groups as needed. Each session lasted about 2.5 hours from 6:30pm to 9pm online using Zoom, and a google doc workbook was used to enable participants to answer questions, and capture data. Sessions were also recorded and a transcript was created. All these documents, recordings and the transcripts were provided to the SFT.

It is important to note that the results of all the work done in these sessions should be considered preliminary work, and further consultation with congregation members should be done. This was a process to brainstorm and consider ideas. It was not meant to be a final decision-making process. This document, though, does include recommendations for future work including how BUC might go about inviting participation in and conducting a more comprehensive, formal Strategic Planning process.

The particular methods and results of each workshop / session are below.

# Session I

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## Methods

Session I on November 13th, 2023 was designed to assess the group's understanding of what they wanted to do together; how well they were working together as group(s), what the individual needs and interests were of various group members and what was needed to ensure they were working well together to accomplish their goals. Twenty-four of the people who were invited to this session showed up to participate.

The following is an excerpt from the google doc workbook used in the Session I to help explain to participants what the session was about:

Strategic planning has a process that unfolds in a typical way including developing a vision, mission, environmental scan, focus areas and priorities.

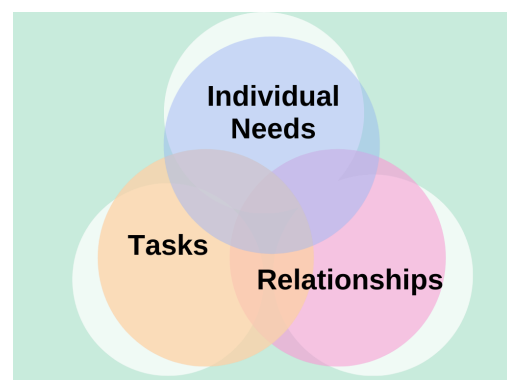
Scenario planning is a similar process but more so for times when there is high uncertainty about what is going on in and around an organization, and when there is an interest in 'transformational' change which can be very messy, chaotic and highly emergent.

My understanding is there is an interest in both from BUC. To do this, we want to make sure we have the right structure, and the appropriate people in the right groups to be working on different tasks.

Different people can prefer different tasks,  
and it could be possible to explore different tasks in parallel.

Also, for groups of people to work well together, there are 3 things that need to be in balance: Clarity of Tasks, Knowledge of Individual Needs & Interests (especially if volunteers), and strong skills and knowledge of how to work well together as a group and foster strong Relationships.

The diagram here is a key assessment tool the consultant has used many times before to determine what is working well in a community group, and where they might be stuck. As part of the preparation for this session, both the coordinating group and an initial meeting at Bedford United Church in August 2023 seemed to indicate that while a lot of ideas had been talked about over the past year, people were frustrated, felt like they were 'spinning their wheels' and not really getting anywhere in terms of action.



After introductions, **Part I** of Session I was to review various goals and Tasks people had been talking about over the past year to try to separate them into what might be most appropriate for Operational, Short-term tasks that needed to happen over the next 6-12 months, and then to see what task might be more appropriate as Strategic / Transformation, Long-term tasks to be worked on over then next 12+ months.

This also included reviewing the structure of the parts of the organization that had been working on the sustainability and transformation of BUC over the past year. This included: Council, the Steering Committee, and the short-term and long-term Working Groups (identified in more detail below).

<b>Working Groups</b> (Short-term)	<b>Financing Deficit</b>	<b>Building Changes</b>	<b>Fundraising</b>	<b>Volunteers / Teambuilding</b>
<b>Goals / Tasks, or Terms of Reference</b>	With other groups, address budget shortfall by championing targeted structural operating changes and fundraising events.	Working with Property Team, WAM, CDC, Trustees, UCW and staff to propose business and mission sound projects to upgrade / modernize discrete areas within the BUC facility and property.	Work with Stewardship Team and SF working groups to create and execute on an annual calendar of fundraising events.	To identify and communicate on volunteer opportunities, to coordinate gaps, and placements within Council and SF, to solicit, train and recognize the contributions of volunteers.

<b>Working Groups</b> (Long-term)	<b>Strategy / Process</b>	<b>Research</b>	<b>Grants</b>	<b>Communication</b>
<b>Goals / Tasks, or Terms of Reference</b>	To develop & assist in implementing processes based on principles of strategic planning that will result in a vision of what BUC will evolve to over the next 5-10 years.	To research and present / report to SF on trends and data relevant to current short & long term planning.	To create a calendar of relevant operating & capital grants and their criteria, recommend grants to pursue, research, coordinate, write & prepare grants for submission, and report back	tbd

			to funding agencies on grant outcomes.	
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<b>Ad Hoc Advisory Group(s)</b>	To be formed when required.
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It is important to try to clarify Tasks, so when volunteers are asked what they might be interested in working on, they know exactly what the task is so they make informed decisions on whether they are interested in working on a particular task, and if they had the capacity to commit to that task.

**Part 2** related to assessing Group Dynamics by asking the following questions:

- Is everyone happy with the groups they are in?
- Does anyone want to change what they are doing?
- How might the gaps be filled?
- Is anyone feeling overworked or overwhelmed?

**Part 3** included asking participants what kind of Tasks they might be most interested in. This included:

- Operational, which tends to tasks that are more short-term oriented, and more concrete, straightforward,
- Strategic / Conceptual tasks which can be more long-term and sometimes required people to be more comfortable with a messier, less concrete process of emergence and working with the unknown, or
- Participants could also say they were interested in both.

**Part 4** asked participants if they felt they understood what they were being asked to do or work on.

**Part 5** asked participants to identify the Top 3 things they thought BUC needed to be working on.

**Part 6** asked the group the following questions:

1. What has been working well so far in your groups?
2. What if anything you think could improve how you work together?
3. Does everyone understand the tasks or goals for the group?
4. Do you feel your needs and interests are being addressed?
5. What do you think is most important for how groups can work well together?



## Results

**Part 1** indicated that several people were confused about what the goals and tasks were that they were being asked to consider or work on. They indicated this was a reason they were hesitant to commit to or step up to do anything.

**Part 2** showed many people felt overwhelmed, and they weren't sure if they were in the right group.

**Part 3** showed which participants were interested in working on Operational (short-term) tasks, Strategic / Conceptual (long-term) tasks, or both. This would help identify who should be invited to one or both of the next 2 sessions. The 2nd session was to be designed to focus on short-term ideas / goals and the 3rd was to be designed to focus on more long-term, transformational work.

**Part 4** indicated 11 participants were not clear on what they were being asked to do, and 6 were.

**Part 5** helped identify what the participants in this session thought were the Top 3 priorities for BUC to work on. The common themes in what they articulated were:

1. Need to address financial health of BUC,
2. Need more volunteers, and
3. Need to increase membership.

**Part 6** results included:

1. What has been working well so far in your groups?
  - “The people who are involved really care and they are talented and generous with their time. They generally have a good sense of humour.”
  - “[People are] respectful, considerate of team member availability and skills; desire for BUC success.”
  - “There has been a wonderful willingness to hear all points of view - this also bogs us down.”
  - “I think we have a group of talented volunteers who care deeply about BUC and community. How do we link passion with action?”
  - “We have a good and fairly consistent understanding of the issues...”
  - “I have enjoyed how the Inclusivity Team functions. We keep a calendar and follow a loose agenda and then determine who is willing and able to show up. Have appreciated each and everyone at BUC.”
  - “People involved have a strong passion for sustaining BUC.”
  - “I truly appreciate the amount of work that has been put in already by the folks in this group. We all care deeply about BUC.”
2. What if anything you think could improve how you work together?
  - “My thoughts on how groups can work well together - clarity on the vision/goals of the

- group, enough people in the group to do the work needed, a clear agenda/timeline, evaluation along the journey before the timeline is reached to check in and see if things are working well or if people in the group need support. That the right people are in the right groups of involvement according to their interest and skill set.”
- “We need more leadership at all levels of volunteering. Too few people are wearing too many hats. They are seldom free to concentrate on one thing and work towards that.”
  - “Need to have small groups with specific tasks well defined except for transformative. Mid term goals 1-5 years are required. Regular attendance at meetings would reduce iteration.”
  - “Improved structure for decision-making. Absences/returns and so many interested and skilled individuals mean we re-open and cycle through items which is creating inefficiencies.”
  - “I don’t think we’ve got a clear picture of what we’re trying to achieve, from a big picture point of view. Also don’t think groups have a clear structure, for leading, making decisions, etc.”
  - “I am concerned with focus; choosing a number of worthy causes/actions, but not focusing/prioritizing.”
  - “Keep groups small.”
  - “For me, at this moment, most important is acknowledging the capacity and scale that we are able to work within. The gigantic vision that we once had about who and how we are going to be needs to be exchanged for something that is actually manageable within our human resources, and life-giving for volunteers, as well.”
  - “Working in groups; coming with an open mind, practice active listening, respecting the ideas and opinions of others, valuing time and input of others, collaboration to achieve an outcome that represents group consensus and meets the needs of all concerned. Willingness to provide the energy required to achieve the outcomes. Perhaps a belief that we will all be led to the exact place/outcome where we are supposed to be!!!”
  - “We could work better if our tasks and timelines were better articulated. And we need to include a reporting back feature. Also we need to involve fresh energy as many volunteers are overwhelmed or burned out. We do not yet understand our goals as we haven’t agreed on them yet.”
  - “Open mind. Listening. Respecting others. Direction, clarity. Understanding. We are all working to a common goal. Understanding of what we Are doing. Transparency, asking others who may want to help... think outside the box.”
  - “Openness to transformation. In person meetings would also improve collaboration (though I recognize that can impact availability and willingness to volunteer).”
  - “Communication and understanding of expectation, desire, night meetings.”
  - “Future planning groups should have multi generational representation to elicit different perspectives.”
  - “We won’t be perfect. It’s time to take action and make mistakes. The brainstorming feels like no end in sight... Focus will lead to action - long term and short term.”
  - “I feel the need to identify the short term tasks and start working on them. Also, it would be helpful to identify the longer term directions to ensure the short term activities are in the right direction.”

### 3. Does everyone understand the tasks or goals for the group?

- “Most people don’t understand tasks.”

- “I feel like the ideas come readily to us, but the “how” and “who” and “when” seems to be assumed to be done by someone else (or presumed to be known?)”
- “I feel like a tourist who is trying to understand the managerial culture of BUC.”
- “I have not been involved in a Sustainable Futures Group. I would like to be but need some more clarity in the expectations of the work to determine where I might contribute.”
- “One area that I am struggling with is that I am not sure how I can help / where my place is with SF.”
- “The longer term, over-arching goals are understood, the shorter term steps are not.”
- “Struggling in a hierarchical society to work in a collaborative setting. BUC has a silo problem. Go fast with a few. Go far with many.

4. Do you feel your needs and interests are being addressed?

Eleven people said no, and 6 people said yes.

5. What do you think is most important for how groups can work well together?

- “Patience? Not sure. I appreciate that we are looking for clarity; there is a plethora of views about even short-term tasks. A bunch of stuff has to drop off the to-do list for many of these groups to be successful. Some people want a tangible, galvanizing short-term goal that people can get behind....what should that be? Who will do it?”

See Appendix A for more details. Names have been removed, but the SFT has copies of the documents with names.

## Session 2

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### Methods

Participants invited to Session 2 were those who had expressed interest in working on Short-term goals, or both short-term and long-term. The session also included reviewing key findings from Session 1 (which were also used to help inform the design of Session 2). This included learning a process for identifying and creating SMART Goals, figuring out when work on goals should be done by, and who will work on such goals. Eleven people showed up to participate.

Key Findings from Session 1 and recommendations for future action included:

1. Clarity of tasks / need for SMART goals,
2. Need for better communication/coordination,
3. Top Issues / Focus Areas; Finances & Fundraising, Building / Property, Volunteer Recruitment & Management, and Membership Development,
4. Recommend changing Short-term Focus Area Groups to: Finances & Fundraising,

Building / Property, Volunteer Recruitment & Management, and Membership Development (folding Fundraising under Finances, but all really inter-connected),

5. Identification of Group Coordinators; responsible for project management & communication within and between groups, including those like Council, and
6. More support/skill development in project management and meeting / group facilitation.

After introductions, **Part I** was a review of how to develop SMART goals.

SPECIFIC            MEASURABLE            ACHIEVABLE RESULTS-ORIENTED            TIME-LIMITED

Participants were invited to only work on developing SMART goals for the short-term groups they were most interested in, and if they were interested in more than one, then they were asked to start with the one they were most interested in and then go on to the next. They were also asked to not fill out the WHO column until they were told to. All the SMART goals were reviewed together, first. Goal was to practice developing SMART goals.

**Part 2** included discussion of the role of Group Coordinators, and an invitation for anyone interested in that role to sign up. No one did. Note: this might be because not the right people were invited to this session. This was mentioned by the SFT later. The idea of a Communications and Engagement group was also mentioned.

## Results

The results for **Part I** included some more clarity for short-term goals.

For **Part 2**, no one signed up for the role of Group Coordinator(s). This might be because the right people were not invited to this session. This work might need to be done with more members of the working groups (mentioned by the SFT later), but it also highlighted how overwhelmed people are feeling and the need for more volunteer recruitment. The idea of a Communications and Engagement group was also mentioned.

See Appendix B for more detail. Names have been removed, but the SFT has copies of the documents with names.

## Session 3

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### Methods

The third session was designed to develop an organizational Vision and identify what the interests of members of the long-term group might be. Participants were asked to share what they thought a reporter five years from now might say in a story about BUC to help develop a draft Vision. From the ideas shared, recurring themes were identified and compiled to create one Vision statement.

## Results

The Vision drafted here is a composite of the ideas expressed by participants in the 3rd Session. It is meant as a 'stepping stone' Vision that could be used for consideration, potential revision and then maybe approval at BUC's AGM in March 2024. It is based on data from the 3rd Session focused on long-term transformation of Bedford United Church. If a Vision is adopted in March, it can be updated and revised at future AGM's.

Note, a Vision is not the same as a Mission for an organization. A Mission is usually a one sentence statement including 'what benefit, for whom.' A Vision can be as detailed as it needs to be, but without including ideas that might be more appropriate as goals to help accomplish the vision. Interest in the transformation of the Church and its role in the community was partly inspired by deep reflection that occurred during the Covid pandemic of the last few years.

### **Draft Vision for Bedford United Church (BUC)**

In 2029, Bedford United Church is financially secure and playing an integral role in the spiritual and community life of the Bedford area of Halifax Regional Municipality (HRM). It is grounded in the Christian faith and the values of the United Church, but it is also openly collaborating with other faith groups and local community groups to create a creative, inspirational and vibrant space that nourishes the 'spirit' of all. This includes redeveloping the 'church' as a multi-purpose space and community hub that is 'buzzing' with a wide range of activities for members of the congregation, but also those in the community who might not identify as Christian.

BUC is actively working to engage people of all ages, providing support for those that are marginalized, isolated or lonely, and advocating for social justice and wellbeing for all in collaboration with other Churches and faith groups, and the HRM community at large. It is known as an organization through which the community supports others. It also collaborates with other United Churches in the area to enhance its offerings to members of BUC's congregation, the congregations of other churches and the community of HRM at large. Membership in BUC's congregation has increased, and is more diverse and inclusive. There are many volunteers to share the work, but volunteers from outside the Church are also contributing to various activities.

See also the Recommendations section for some highlights from some more tangible, concrete ideas that came up as part of this session, and were separated from the more visionary ideas.

See also Appendix C for more detail. Names have been removed, but the SFT has copies of the documents with names.

## Conclusion

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This was Phase I of what would need to be a larger process to address all the needs, interests and goals of BUC. To date this has included:

- Consulting with Council members, members of the Sustainable Futures Steering Committee, Advisory Groups and related Working Groups as needed,
- Reviewing relevant documents as needed, and
- Developing a strategic / transformative planning process including environmental scan; review of vision, mission and values; and development of key focus areas and priorities in complement to work that has already been done and structures created (see Recommendations section for more on this).

The deliverables for Phase I of this project included:

- 3 meetings / workshops (online), one with full Council and Steering Committee then one short-term focused and one longer-term focused,
- Clarification of how communication amongst groups currently works, what is working, any worries or concerns, and any changes that might be needed,
- Clarification of current group dynamics, what's working, any worries or concerns, what might need to change, and
- A Report on Phase I including Recommendations for future work to help move the organization forward towards its goals of sustainability and transformation.

All of these things have been done. It is important to note, though, this work is not finished. The results of the work done in these sessions / workshops should be considered preliminary, and further consultation with congregation members must be done. This was a process to brainstorm and consider ideas. It was not meant to be a final decision-making process.

## Recommendations

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As a result of the work done in Phase I, a key recommendation is that a Medium-term group be added to work on creating a strategic plan for the next 5 years. There could still be a Short-term group to work on very urgent concerns, interests and tasks that need to be addressed within the next 6-12 months. The Medium-term group would then focus on finishing some of the Strategic Planning work done here (ie. Vision for the next 5 years), and implementation of that plan (in coordination with the Short-term group) over the next 12-48 months. The Long-term group would then focus on developing a more 'transformational' Vision for BUC beyond the next 5 years.

The other parts of a more comprehensive, formal **Strategic Planning process** would include:

- **Environmental Scans** looking at things like Political, Economic, Social and Technological (PEST) trends and how they could impact or inform the work

BUC is looking to do. A look at the Strengths of BUC, Opportunities that could help it do its work, Aspirations of not just this group of participants but also those of others in BUC's Congregation, and exactly what Results everyone at BUC want to accomplish together (SOAR).

- Development or review of a **Mission** statement if there is not one, and if there is it should be reviewed to see if it still makes sense and aligns with the vision that is approved at the March 2024 AGM, if one is. A Mission statement is usually a one-sentence statement that includes what benefit, for whom.
- Review of **Values & Inclusivity Statement** (as per website) to see if any changes are needed,
- Review of work done here on **Key Focus or Performance Areas (KPA's)** and further consultation with the rest of the congregation,
- **Prioritization** of tasks identified as part of accomplishing work in the various Focus Areas or KPA's, and development of a timeline for such work (more detail on this below),
- More clarity of tasks as **SMART** goals, and
- Development of an **Evaluation** plan to help BUC stay on track for its goals, be able to track and assess its progress, and know when a goal or task has been completed.

## Focus Areas & Priorities

Deciding on Focus Areas / KPA's and priorities needs to consider where the 'energy' to do the work. This means starting with what volunteers are most interested in, but also reviewing staff job descriptions to see how they could help support work in different areas as well. Recruiting volunteers with human resource management expertise and/or hiring an HR consultant are a couple of ways this could be done.

Recruitment of more volunteers also seems very important to allow people to focus on what they are most interested in, and to fill in any gaps in human resources. This could include hosting a volunteer recruitment fair after service, and doing a survey of members to see what interests and skills they have.

Communication of new and more clear goals, priorities and tasks could also help to recruit more volunteers, and personal asks. Short time commitments are good for all volunteers but especially new recruits to help increase engagement. Personal 'asks' are also very important, and many volunteers like to work with people they already know (family, friends, etc).

A cost / benefit analysis of various goals and the potential time required to complete tasks noted below is also important. This could be a key part of the work that the Short-term group could do, or if they are too busy with their primary concerns then the Medium-term group could do this work.

Current Long-term groups should also be re-evaluated. The old groups included: Strategy / Process, Research, Grants, Communication. Groups should instead be designed based on themes / focus areas that have emerged from the data from Phase I, and then reviewed with members of the Congregation as well.

Below are some highlights of the work done in Phase I that could be useful to inform some changes to working groups, and some of the more ‘tangible, concrete’ ideas that came out of Session 3 that were separated from the ideas that helped create the draft Vision included above.

<b>Short-term Group Highlights</b> (somewhat in order of concerns expressed)	<b>Long-term Group Highlights</b> (in order of potential for space rental income to help address financial concerns)
<p><b>Financing &amp; Fundraising</b></p> <p>With other groups, address budget shortfall by championing targeted structural operating changes and fundraising events.</p> <p>Work with Stewardship Team and Sustainable Futures Group to create and execute on an annual calendar of fundraising events.</p> <p>Amalgamation of what were separate Financing &amp; Fundraising groups.</p>	<p><b>Increasing Technological Capacity</b></p> <p>To encourage more groups to rent and use various spaces within the Church, and to enhance the capacity of the Congregation itself to do the work they want to, to be more inclusive, and to make it easier for volunteers to connect and plan the work they want to do.</p>
<p><b>Volunteer Recruitment &amp; Management</b></p> <p>To identify and communicate on volunteer opportunities, to coordinate gaps, and placements within Council and Sustainable Futures Group, to solicit, train and recognize the contributions of volunteers.</p>	<p><b>Upgrading the Kitchen</b></p> <p>To meet safety requirements; increase use and rentals of kitchen space; increase capacity to serve various groups including people who are marginalized, isolated or disadvantaged in some way (providing warm meals and a food bank).</p>
<p><b>NEW! Membership Development</b></p> <p>Need to define goals for this group.</p>	<p><b>Re-designing / Upgrading the Sanctuary</b></p> <p>To be a top-notch performance space for music and theatre, and increase rentals of space.</p>
<p><b>NEW! Communications &amp; Engagement</b></p> <p>Need to define goals for this group. Came up as a suggestion in Session 2.</p> <p>Could combine with Membership Development.</p>	<p><b>Re-designing / Upgrading Other Spaces</b></p> <p>To be able to rent spaces to other groups; teach people various types of skills related to art, music and theatre; include an art gallery; provide skill development for BUC volunteers and those of other community groups; provide health care services; provide services to those who need them for warmth, showers, lockers / secure</p>



	<p>storage for personal items, care for children and pets for those who need that while they pursue various work or educational opportunities; provide space for a makers / arts studio, a woodworking space, and a recording / podcast / filmmaking studio.</p>
	<p><b>Re-designing Outdoor Spaces</b></p> <p>To enable meditation and a closer connection to nature; shelters and parking for people that homeless and sleeping in their cars; host more outdoor events related to the pizza oven; create a community garden and provide an accessible food pantry; shed for bicycles; add garage doors that can open to and connect the outdoor spaces to the indoors of the Church; local market on Saturdays (inside on bad weather days); fast charger for electric vehicles; digital sign; Summer Ice Cream booth; and outdoor seating and performance spaces.</p>

**Group Coordinators**

Another recommendation is that Group Coordinator(s) (ideally a couple of people so the role can be shared and if one person can't be at all meetings, etc then the other can) should be identified for each working group. This should also be the only role they would play - unless they are sure of their capacity to do more.

The purpose of the role is to help coordinate activities and communication within and between groups to ensure everyone is up to date on what is happening and progress towards goals, or if help is needed because someone(s) can't follow through on a goal. Both Synchronous (like meetings where everyone is together) and Asynchronous (distribution of meeting minutes, use of an online platform like Basecamp) communication methods should be used.

Group Coordinators would also be responsible for identifying key themes and areas for action from this document, and ways to consult other members of the congregation. They will also be responsible for calling / arranging any future group meetings, and identifying any group volunteer needs and communicating those to the Volunteer Recruitment & Management Group.

These are key roles that so far no one has volunteered for. Potentially staff could play this role (within new job descriptions), and/or specific recruitment of volunteers with relevant skill sets should be

personally approached to see if they would be willing to fulfill such roles (allowing them to determine how long they might be willing to play such a role). These roles could also be filled with volunteers with specific staff supporting them.

## **Learning and Skill Development**

A last recommendation is that volunteers should be offered more support and skill development opportunities in Group Facilitation, Project Management, Volunteer Recruitment & Management, Teambuilding & Group Dynamics, Financial Diversification, Grant Writing, and Communication and Engagement. Some members of BUC already have a lot of experience in these areas, and if possible they should be invited to be part of this work if they are not already. A survey of congregation members' existing skills and experience with similar work would also be a good idea.

One of the things that could help engage many people who might be interested in volunteering though is to help them learn new skills. This would then also help them be more effective in the work they might choose to do. BUC could also invite volunteers and staff from other community organizations to participate in such opportunities as well to help BUC engage more with other community organizations in their area, and to help offset any costs for such learning and skill development opportunities.

## Appendix A

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### **Sustaining & Transforming Bedford United Church**

Nov 13th Workshop with Chutzpah Consulting, Laurie Cook

\*\*Note: Names have been removed.

## **WORKBOOK**

### **Grounding**

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### **How to use a Google Doc**

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Look for a link in the Zoom Chat (under More at the bottom). Then click on the google doc link in the chat. This should open a google doc with WORKBOOK near the top. You can scroll up and down using your touch pad and two fingers, or the arrows in the bottom right of your keyboard,

If you lose connection, or I freeze, you can leave the zoom call for a bit and then use the same zoom link to get back in. If I'm still frozen or not on, give me 5 min and then try again.

If there is still a problem, and you don't know what to do, you can call me at 902-209-6838.

## Introductions

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Please look for your name and put your cursor in the box beside your name and type and answer to the question at the top. I have put the people who RSVP'd in first and then others who said they might be able to attend.

Something others might not know about you	Something others might not know about you
I love all food (savory and sweet) that has peanut butter in it.	When I was a kid they called me Big Bird
I was 60 miles from the magnetic north pole	I lived in a tent for 4 months in the NWT (work as undergrad in Geology)
My nickname was Teddy	I am an adrenaline junkie.
I have been at BUC since 1984	
I'm 76	I am married to Peter Dykhuis (who is representing me tonight...)
I had my private pilot's license and flew out of Toronto Island for 9 years	Worked on oil rigs in Mid-East for 3 years
I'm really into plants. . . to the point where my family staged an intervention.	I am in and just computer challenged.
I was once a health inspector	I was the youngest person to receive a life time membership With UCW. I was president of 2 units. One I created in memory of my Mom. I was editor of Martime Conference UCW. Smarter then you know 😊
I've been inside a nuclear reactor	Lived in the Arctic for 2 1/2 years .
I know how to make maple syrup, butter and candy.	I am a middle child, 2 brothers
I was rescued after my ship sank 500 km off Brazil.	I am not a Donald Trump supporter.
I'm quite good at strategic board games (at least against my family 😊)	

I am counting down to retirement - 207 days!	
I have lived in 4 provinces in Canada.	

## Plan for this Session

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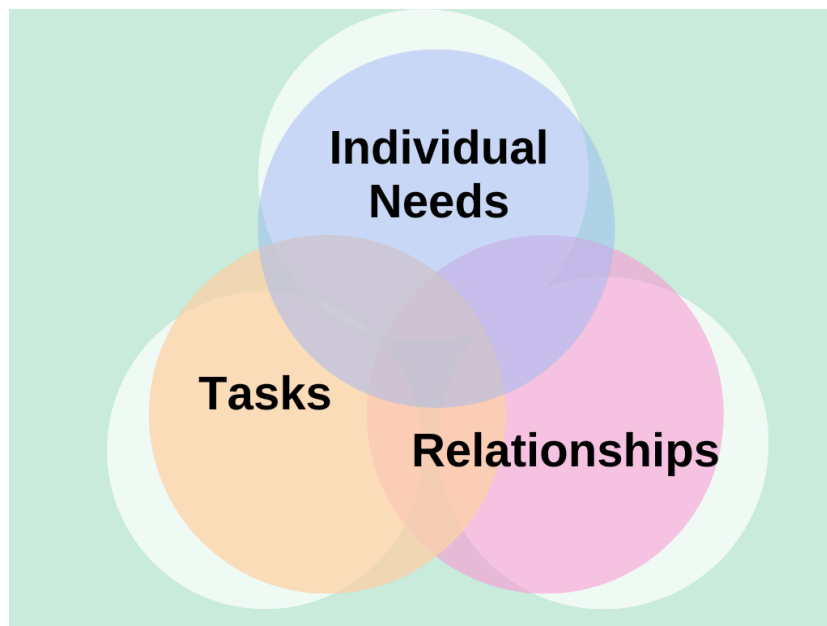
Strategic planning often has a typical process that unfolds in a typical way. Usually there is a process to develop a vision, mission, environmental scan, focus areas and priorities.

Scenario planning is a similar process but more so for times when there is high uncertainty about what is going on in and around an organization, and when there is an interest in 'transformational' change which can be very messy, chaotic and highly emergent.

My understanding is there is an interest in both from BUC. To do this, we want to make sure we have the right structure, and the appropriate people in the right groups to be working on different tasks.

Different people can prefer different tasks,  
and it could be possible to explore different tasks in parallel.

Also, for groups of people to work well together, there are 3 things that need to be in balance: Clarity of Tasks, Knowledge of Individual Needs & Interests (especially if volunteers), and strong skills and knowledge of how to work well together as a group and foster strong Relationships.



**Review Tasks, can include:**

- Operational - Short-Term (6-12 months)
- Strategic / Transformational - Long-term (12+ months)

**Determine, People’s Interests:**

- Operational; tend to like things to be more concrete, straightforward
- Strategic / Conceptual; need to be comfortable with emergence, working with the unknown
- Can be both

**Evaluate Group Dynamics**

1. What has been working well so far in your groups?
2. What if anything you think could improve how you work together?
3. Does everyone understand the tasks or goals for the group?
4. Does everyone feel they are in the right group?
5. Do you feel your needs and interests are being addressed?

**Goals / Tasks & Groups so far...**

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**Overall Goal for the Sustainable Futures Group...**

To research and develop recommendations to BUC Council for a future direction for BUC that is sustainable in relevance, in effort and financially, and will be synthesized into a Congregational vision which would be confirmed at the 2024 AGM end March).

**Current Groups**

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**Steering Committee**

<b>Working Groups (Long-term)</b>	<b>Strategy / Process</b>	<b>Research</b>	<b>Grants</b>	<b>Communication</b>
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Goals / Tasks	To develop & assist in implementing process based on principles of strategic planning that will result in a vision of what BUC will evolve to over the next 5-10 years.	To research and present / report to SF on trends and data relevant to current short & long term planning.	To create a calendar of relevant operating & capital grants and their criteria, recommend grants to pursue, research, coordinate, write & prepare grants for submission, and report back to funding agencies on grant outcomes.	???
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<b>Working Groups (Short-term)</b>	<b>Financing Deficit</b>	<b>Building Changes</b>	<b>Fundraising</b>	<b>Volunteers / Teambuilding</b>
Goals / Tasks	With other groups, address budget shortfall by championing targeted structural operating changes and fundraising events.	Working with Property Team, WAM, CDC, Trustees, UCW and staff to propose business and mission sound projects to upgrade / modernize discrete areas within the BUC facility and property.	Work with Stewardship Team and SF working groups to create and execute on an annual calendar of fundraising events.	To identify and communicate on volunteer opportunities, to coordinate gaps, and placements within Council and SF, to solicit, train and recognize the contributions of volunteers.

<b>Ad Hoc Advisory Group</b>	To be formed when required to advise any groups.
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**Issues**

- 1) Is everyone happy with the groups they are in? Does anyone want to change what they are doing? How might the gaps be filled? Is anyone feeling overworked or overwhelmed?

Answers to Questions	Answers to Questions
Overwhelmed with other commitments, so not signed up for above groups	<p>I do find that I do a bit of everything, not limited to the one group my name is with</p> <p>I think we need more volunteers, but then you need to manage more volunteers</p> <p>I do feel a bit overwhelmed by times with the task(s) of being effective</p>
No problem	<p>Yes, overwhelmed. Would like to see clearer structure among different elements so the pressure of coordination is reduced.</p> <p>Difficulty balancing with other roles at church.</p>
I'm away in Feb and March	<p>Not sure where Council Chair could properly serve. Looking forward to suggestions.</p>
<p>suggest we contact David Hart re volunteers</p> <p>I spoke w a member of another church who suggests we ask the level of financial support our members are prepared to commit to</p>	
still figuring out where I fit and where my energy can best be focussed	
I'm not clear on what my role is in regards to these groups	<ol style="list-style-type: none"> <li>1. Have not selected a group as of yet</li> <li>2. I am extremely committed to work with Beacon House Shelter, BUC outreach and feel that I do not have a tremendous amount of time for more to add. Although, I am interested and feel there is value in this process.</li> </ol>
My time is extremely limited/non existent right now but will open up in December	<p>Building changes question. Volunteer interested. I personally looking at this time the way the committee is going. But I am willing to help but know my limits</p>
I just added my name to one of the committees. Not currently overwhelmed but reserve the right to feel that way later ;)	<p>I am not currently involved in any groups with the SF and am trying to figure out where I can contribute.</p>
Life is always complicated. Willing to make time for this work.	<p>Not yet, would like to get involved but not sure where. I enjoy project work</p>



I haven't decided as yet, where I might make the best contribution.	I am one of a very small group tasked with the operational building responsibilities so will liaise with the buildings group.
Yes overworked / overwhelmed but not because of Sustaining Futures Hope to have more time in the New Year. For grant writing, I will need some training / guidance	I support with communications, sit on Council and SF. I have been challenged to make meeting times given my work schedule and the evening routine of my young kids.
My time is freeing up a little, I hope to be more available than I have been of late	
Quite interested but waiting for a surgery date and so have resisted putting my hand up for more at this time	

2) Who would consider themselves interested in the following?

<b>LIKE concrete, straightforward tasks (Y / N)</b>	<b>OK with uncertainty, a bit of messiness, and emergence of ideas (Y / N)</b>	<b>LIKE / OK with Both (Y / N)</b>
Can do if needed	yes	
		yes
Y	Not so much	
		yes
yes	not so much	perhaps
		yes
		Yup
	yes	some
		Y
yes	yes	yes
yes	Had a full professional life of this.	

yes	Not so much, but can manage when needed	
yes	Yes, to a point	yes
		Very comfortable with both. Worked in IT for 30+ years and in the facilitation world for 20+ years. Different processes but similar - transformative change.
	yes	yes
	yes	yes
		yes
yes	yes	yes
	Thats my life ;) yes	Yes
yes	yes	yes
		Yes
yes		
Yes	Yes	

3) Do you feel you understand what you are being asked to do, or work on?

Answers to Questions	Answers to Questions
Not really, unless it relates to work that comes out of question 2	Sort of
Not completely	Yes currently, but feel the weight or expectation of filling in the gaps for others
In general, but I don't have any answers	Limited understanding

Sort of	
not 100%	
mostly	
Not within the mandate of this group, no	I believe so
More or less but more direction and shape would be welcomed	No not completely.
Generally yes	No ,not at all.
somewhat	No, not at all
I am not certain.	yes
Yes and no, direction is welcome	
Yes regarding volunteers. No regarding building changes	
I'm totally uncertain at this moment. First time I'm attending.	
I understand the mandate and want to move to solutions. Momentum over perfection.	

4) SMART Goals, groups above are focus areas and don't contain specific, measurable, achievable, results-oriented, time limited goals. Unless these are somewhere else, and they just haven't been shared with me.

What do you think are the TOP 3 things that BUC needs to be working on? Please be as specific as you can related to developing SMART goals.

Answers to Questions	Answers to Questions
1. Securing permanent Lead Minister 2. Increasing membership 3. Diversifying modes of income	1) Review Constitution and prescription for volunteer activities by January 30. What is outside the C? Do we need to change/update the C based on current needs. 2) Double the number of volunteers by May 2024. 3) Research and develop a sustainable

	<p>system (leveraging technology and best practices) for recruiting, supporting and recognizing volunteers in key roles. Finish by August 2024.</p>
<p>Resolve the financial issue for the foreseeable future. Could be done quickly. Increase the attendees at church. Hire a minister that concentrates on membership. Revitalize and increase the volunteers. Relates to previous goals.</p>	<p>Short-term: Finalize congregational survey and implement to collect data elements on who we are, timeframe = by end of december. Done after individuals not responding are contacted by phone...ie no more replies coming in. Medium term: Analyze giving patterns at BUC to inform evaluation of BUC's financial sustainability. (need survey data, and other BUC reports first) Done when analysis is confirmed by SF SC and Council (no more questions, requests for info). Long-term: Collect and evaluate ideas on future options for BUC. Missing the "how" to be a SMART goal. Timeframe: over next year?? First stage is done when the designed plan is completed, and the ideas are recorded and presented to SFSC and Council.</p>
<p>Decide on 1-3 goals where BUC can make a difference in the community by March 24</p>	<ol style="list-style-type: none"> <li>1) Complete Lead Minister recruitment.</li> <li>2) Volunteer recruitment - 10 new people/year</li> </ol>
<p>1. Census, 2. survey, 3. Use facility differently to have it used</p>	
<p>Getting more folks into the seats and on PAR Considering selling Property Finding a new amalgamated leased space within the next 24 months OR PERHAPS WITHIN 5 YEARS</p>	
<p>5 years plus: be relevant to local communities and, ideally, all members of our multicultural and diverse society  Within 24 months: maximize the real estate footprint for the community good and, whenever possible, BUC income</p>	

<p>Becoming financially sustainable within 18-24 months; experiencing ourselves as a faith community that meets the emergent spiritual and religious needs of the people of Bedford, through programming, in reach and outreach, within 24-36 months; to understand that *God is not finished with us* even though we are going through something messy and difficult, and to be guided through this process by our faith rather than by our anxiety about change and loss</p>	<ol style="list-style-type: none"> <li>1. Increase the number of people who feel passionate about being a part of the BUC community as evidenced by participation, active involvement, financial and time contribution and commitment. This would include an analysis as to why some people have withdrawn from BUC. Maybe the why is a crucial piece in solving the decline.</li> <li>2. Develop a clear vision for the future operation of BUC; when, where, how, who/ that meets the needs of community</li> <li>3. If we decide to continue with current space, how do we use the space in broader ways to serve community better.</li> </ol> <p>I CANNOT ANSWER THESE QUICKLY I AM HERE!!!!</p>
<ol style="list-style-type: none"> <li>1. Determine new sources of revenue extending longer term (may require deep transformation)</li> <li>2. Fill the building preferably with rent payers</li> <li>3. Extend our offerings in a way that meets broader spiritual needs</li> </ol>	<p>We need to focus on a few short goals for community. Things we can create more revenue. We have more people using the church. We have a greater presence in community. We can see and feel it. We have increase revenue from the building. More inclusive groups . Diversity upgrade facilities to make this happen .rearrange how the building is used.</p>
<p>Securing new revenue streams to offset losses in congregational givings (12+)</p> <ul style="list-style-type: none"> <li>● We will know this need has been met when we have a balanced or surplus budget</li> </ul> <p>Growing the programming and supports we provide to the community and promoting what we have to offer (short and long)</p> <ul style="list-style-type: none"> <li>● We will know this has been achieved when we have new programs on offer</li> </ul> <p>This one is less <i>specific</i> but we need to rethink our role as a church. Finding a way to be relevant in an increasingly secular world that still meets people's</p>	<ol style="list-style-type: none"> <li>1. Increase family membership in the</li> <li>2. congregation.</li> </ol> <p>Make data a priority in our decision making so we need to first establish an accurate data base in various areas of the programs within the Church, senior involvement in afternoon worship, coffee time etc..i.e. Music, Sunday school .3. Increase the number of volunteers from our younger members of the congregation with a targeted approach.</p>

<p>spiritual needs. (12+)</p> <ul style="list-style-type: none"> <li>We will know this has been achieved when community reaches out to us for partnership projects</li> </ul>	
<ul style="list-style-type: none"> <li>New revenue streams - short term</li> <li>Greater community presence (do we know our neighbours ?) - ongoing</li> <li>Reexamination of the social structures that aren't working in religion and finding out if/how folks get their spiritual needs met (are we relevant?) - long term</li> </ul>	<p>S – Create a training / Meeting environment that could be used for businesses  M – Budget and plan a room for technology upgrade and marketability, forecast revenue  A – Built a project plan – get quotes – fundraise  R – Timelines and sales objectives  T – Up and running for market in 6 months</p> <p>-----</p> <p>S – Increase Community involvement</p> <p>M – Usage of Crossing has increased</p> <p>A – Training for pizza oven, regular night fire and community meal</p> <p>R – increase people coming to church and donations for services</p> <p>T – 6 – 12 Months</p> <p>-----</p> <p>Get rid of Pews, we could seat more for charitable purposes, more seats for Dinner Theater, more room for banquets etc. Pews are replaced with more stackable, moving pieces of furniture</p>
<p>Determining whether the post Covid Sunday attendance numbers have altered (or will) alter BUC's longer term financial circumstances, and week to week church involvement.</p>	<ul style="list-style-type: none"> <li>- Match operational expenditures and revenues</li> <li>- Identify additional revenue sources beyond the current congregation</li> <li>- Grow the congregational membership</li> </ul>
<ol style="list-style-type: none"> <li>More rentals</li> <li>Getting more people on PAR</li> <li>Attracting new families to BUC</li> </ol>	<ol style="list-style-type: none"> <li>Increase congregational givings - accomplished by more people in pews. This is accomplished by additional participants feeling included / welcomed</li> </ol>

<p>I think these are all short term but can extend into the long term. I would love to see the building become something “more” in the long term. The “more” is what we are after.</p>	<p>in the church.</p> <ol style="list-style-type: none"> <li>2. Determine alternate sources of revenue to offset cost of BUC operations. <ol style="list-style-type: none"> <li>a. How do we maximize the benefit of the facility while meeting the needs of community??</li> </ol> </li> </ol>
<ol style="list-style-type: none"> <li>1. Find and develop alternate sources of revenue. (Achieved when revenue is greater than expenses)</li> <li>2. Attract and engage new people to BUC who will contribute financially AND get involved (Achieved when teams and groups have a full slate of active volunteers).</li> <li>3. Find ways to “advertise” BUC to people who are not currently involved so people will visit and perhaps decide to become part of the congregation</li> </ol>	
<ol style="list-style-type: none"> <li>1. Long-term rentals in alignment with values of BUC</li> <li>2. Recruiting volunteers to work on fundraising initiatives. 6-12 mos.</li> <li>3. Ongoing encouragement of PAR for online and in-person services</li> </ol>	

## Evaluating Group Dynamics

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1. What has been working well so far in your groups?
2. What if anything you think could improve how you work together?
3. Does everyone understand the tasks or goals for the group?
4. Do you feel your needs and interests are being addressed?
5. What do you think is most important for how groups can work well together?

Answers to Questions	Answers to Questions
<p>I am not involved in any of the above SF groups. I am on church Council. My thoughts on how groups can work well together - clarity on the vision/goals of the group, enough people in the group to do the work needed, a clear agenda/timeline, evaluation</p>	<ol style="list-style-type: none"> <li>1. The people who are involved really care and they are talented and generous with their time. They generally have a good sense of humour.</li> <li>2. We need more leadership at all levels of</li> </ol>

<p>along the journey before the timeline is reached to check in and see if things are working well or if people in the group need support. That the right people are in the right groups of involvement according to their interest and skill set.</p>	<p>volunteering. Too few people are wearing too many hats. They are seldom free to concentrate on one thing and work towards that.</p> <ol style="list-style-type: none"> <li>3. No.</li> <li>4. No.</li> <li>5. Patience? Not sure. I appreciate that we are looking for clarity; there is a plethora of views about even short-term tasks. A bunch of stuff has to drop off the to-do list for many of these groups to be successful. Some people want a tangible, galvanizing short -term goal that people can get behind....what should that be? Who will do it?</li> </ol>
<p>Strategy worked well.  Large group meetings were repetitive with lots of storming.  Need to have small groups with specific tasks well defined except for transformative.  My needs do not need to be met. The work of the SF Committee is what is important.  Mid term goals 1-5 years are required.  Most people don't understand tasks.  Regular attendance at meetings would reduce iteration.</p>	<p>Well: respectful, considerate of team member availability and skills;  Desire for BUC success.  Improve: improved structure for decision-making. Absences/returns and so many interested and skilled individuals mean we re-open and cycle through items which is creating inefficiencies;  I feel like the ideas come readily to us, but the "how" and "who" and "when" seems to be assumed to be done by someone else (or presumed to be known?)  Q3: No I don't feel the differentiation between short-term and longer-term goals is understood; and we don't have a mechanism to sync them.  Q4: Yes  Q5: Clarity of tasks and how they fit together....and clarity of when something is a longer term or shorter term item. For instance, significant building changes should likely await longer term directions to be known?</p>
<p>I don't think we've got a clear picture of what we're trying to achieve, from a big picture point of view  Also don't think groups have a clear structure, for leading, making decisions, etc</p>	<p>I am concerned with focus; choosing a number of worthy causes/actions, but not focusing/prioritizing</p>
<p>I'm not in an SF group yet - no group seems to fit</p>	



<p>what I can offer</p>	
<p>keep groups small</p>	
<p>I'm happy to serve on Sustainable Futures as a community member and enjoy it as a think tank of sorts. But I feel like a tourist who is trying to understand the managerial culture of BUC.</p>	
<p>I've only been in the role 2.5 months so still doing a lot of listening and observing. I sense panic due to lack of volunteers to tackle what feels like an insurmountable project – which comes in addition to calling a new Lead Minister. For me, at this moment, most important is acknowledging the capacity and scale that we are able to work within. The gigantic vision that we once had about who and how we are going to be needs to be exchanged for something that is actually manageable within our human resources, and life-giving for volunteers, as well.</p>	<p>I have not been working in a group for sustainable futures other than our initial group last year.  Working in groups; coming with an open mind, practice active listening, respecting the ideas and opinions of others, valuing time and input of others, collaboration to achieve an outcome that represents group consensus and meets the needs of all concerned,  Willingness to provide the energy required to achieve the outcomes.  Perhaps a belief that we will all be led to the exact place/outcome where we are supposed to be!!!</p>
<p>People involved have strong passion for sustaining BUC.  We could work better if our tasks and timelines were better articulated. And we need to include a reporting back feature. Also we need to involve fresh energy as many volunteers are overwhelmed or burned out.  We do not yet understand our goals as we haven't agreed on them yet.  My own needs and interests are being met.  For groups to work well together, it helps to have an outside voice (facilitator), we need to define and organize our tasks, mark, communicate and celebrate our progress.</p>	<p>I am not in a working group. Open mind.  Listening. Respecting others.  Direction, clarity. Understanding. . We are all working to a common goal  Understanding of what we Are doing.  Transparency, asking others who may want to help.. think outside the  Box  Everyone has Something to contribute.</p>
<ol style="list-style-type: none"> <li>1. A recognition that we need to do something!</li> <li>2. Openness to transformation. In person meetings would also improve collaboration (though I recognize that can impact availability and willingness to volunteer)</li> <li>3. ---</li> <li>4. Yes needs and interests are being addressed</li> </ol>	<p>I have not been involved in a Sustainable Futures Group. I would like to be but need some more clarity in the expectations of the work to determine where I might contribute. My sense is that I might wish to be involved in the short term Team however I am not sure if there is an actual short term group itemizing short term objectives</p>

<p>5. Groups need to be open to completely new, outside the box ideas that may not be fully formed but working through them in a collaborative way. Also, setting short term targets so that long term goals don't feel insurmountable.</p>	<p>.</p>
<p>There has been a wonderful willingness to hear all points of view - this also bogs us down. Struggling in a hierarchical society to work in a collaborative setting. BUC has a silo problem. Go fast with a few Go far with many.</p>	<p>Communication and understanding of expectation, desire, night meetings</p>
<p>I have not been involved in 'new' group sessions, for the most part, to date.</p>	<p>Future planning groups should have multi generational representation to elicit different perspectives. My group is strictly operational.</p>
<p>Unfortunately, I have not contributed much to SF since it began. I have attended most of the meetings but have not been doing any active work. The main reasons are time constraints and I am already very involved in many aspects of BUC so it is hard to fit it in. One area that I am struggling with is that I am not sure how I can help / where my place is with SF. I truly appreciate the amount of work that has been put in already by the folks in this group. We all care deeply about BUC.</p>	<p>We won't be perfect. It's time to take action and make mistakes. The brainstorming feels like no end in sight.  I think we have a group of talented volunteers who care deeply about BUC and community. How do we link passion with action?  Focus will lead to action - long term and short term.</p>
<p>1. We have good and fairly consistent understanding of the issues, as evidenced by the consistent and common responses to question 4, improved finances and more volunteers are consistently mentioned. 2. I feel the need to identify the short term tasks and start working on them. Also, it would be helpful to identify the longer term directions to ensure the short term activities are in the right direction. 3. The longer term, over-arching goals are understood, the shorter term steps are not. 5. Communication within and between the groups and also to the congregation are important</p>	
<p>Working with the Inclusivity Team, singing with the</p>	

<p>choir and taking on a role of Community Care Liason has been a lot for me.... And ... I have enjoyed how the Inclusivity Team functions. We keep a calendar and follow a loose agenda and then determine who is willing and able to show up. Have appreciated each and everyone at BUC.</p>	
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**Closing**

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<b>What was something that stood out for you tonight?</b>	<b>What was something that stood out for you tonight?</b>
<p>I enjoyed the format of everyone working on a document together at the same time. The need for more people really stands out.</p>	<p>I do like the way that it moved along. I learned something about that.</p>
<p>First structured meeting with recorded thoughtful comments. Should allow progress.</p>	<p>Really terrific way to collect everyone's opinions.</p>
<p>We seem to be revisiting what we've already said and done - no progress and nothing new achieved Are all the people on this tonight now sitting on the SF group?</p>	
<p>Mostly already talked about - We need to DO something or plan something more concrete</p>	
<p>ease of completing info Danger of failure to maintain sustainability Getting financial commitment from folks who wish BUC to remain as an on going organization Issue is to get younger folks involved</p>	
<p>Building a record through Google Docs is valuable</p>	
<p>Having a shared document is a good way to share information broadly among the group. Not feeling we have any further clarity of tasks or strategy for understanding the difference between short and medium term goals. Looking forward to the next two meetings!</p>	<p>The process has been structured and the wheels need to start turning in a forward motion at a reasonable, achievable pace. There is certainly an amazing group of competent individuals participating in this process which gives me confidence in the future evolution of BUC!</p>
<p>Its clear to me that having a facilitator really helps to organize us. Sometimes our meetings have felt</p>	<p>We need to start moving. Looking to move forward. Next steps. Add more more that can</p>

like herding cats. Also, at a glance its reassuring to see that many agree on priorities.	help.more volunteers.
I agree with Carol that tonight feels like a review of what we've talked about already, but perhaps this is necessary to get things moving. SMART goals was a great strategy and should be kept front of mind to avoid spinning wheels as committees get working.	This process tonight was new for me and I found it helpful.The meeting worked well as far as moving along. Am anxious to do something for this work and to be involved in a process where we can come up with some concrete priorities.
Google doc worked well. Was hoping to move beyond dynamics to concrete actions.	You need volunteers and to allow more people in the circle to get help with starting some of these ideas. Draw the circle wide :) Wanting to help out
The importance of organizational specifics.	General unanimity with regard to the financial sustainability requirements. We can't help others or grow our outreach until we get our own fiscal house in order.
Really appreciated the google doc sharing / populating info as we go. I feel like this would have been very helpful a year ago to quickly and efficiently gather everyone's ideas. Another thing that has stood out is that many of us are on the same page about making change, but are unsure about how to do it. We need to do something... what's our next step?	
The shared Google doc is an excellent tool! The content is somewhat repetitive of previous conversations, but reasonable to bring Laurie up to speed.	
Appreciated stepping in. Good to have one place to gather thoughts. Hopefully someday to collate information and find a way to prioritize challenges.	

**THANK YOU & NEXT STEPS!**

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Andrea or someone will be in touch about other meeting dates.

Short-term: November 26 or 27th  
 Long-term: December 3rd or 4th

## Appendix B

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### **Sustaining & Transforming Bedford United Church**

Nov 27th Workshop #2 with Chutzpah Consulting, Laurie Cook

\*\*Note: Names have been removed.

### **SHORT-TERM WORKBOOK**

#### **Grounding**

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#### **How to use a Google Doc**

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Look for a link in the Zoom Chat (under More at the bottom). Then click on the google doc link in the chat. This should open a google doc with **WORKBOOK** near the top. You can scroll up and down using your touch pad and two fingers, or the arrows in the bottom right of your keyboard,

If you lose connection, or I freeze, you can leave the zoom call for a bit and then use the same zoom link to get back in. If I'm still frozen or not on, give me 5 min and then try again.

If there is still a problem, and you don't know what to do, you can call me at 902-209-6838.

**Who is here?**

Please look for your name and put your cursor in the box beside your name and type and answer to the question at the top.

Thoughts from last week?	Thoughts from last week?
	I am anxious about this session, just given how much difficulty we have had getting traction/sanction/action.
I hope we can get somewhere concrete tonight - I found that last week was mostly repetitive and what I call 'fluffiness' - that is not me.	
I am interested in making progress. Not sure if the results will be as expected.	
I am okay with the progress. Time to get at it.	
More interested in the long term but want to stay in touch with short term	I was initially worried at the beginning of our last session as it seemed to take us a while to get organized. However, I was pleasantly surprised how we eventually pulled ourselves together and worked our way through the workbook and began to visualize our short term tasks .
I am excited by the idea of reconsidering how we organize ourselves and our visioning to move beyond feeling stuck and anxious	Lots to cover looking to see what project task we are looking to accomplish, curious of what has been identified already
I like seeing our thought processes in the shared workbook.	
Glad that we are getting some momentum going tonight	
I appreciate the format and the efficiency of the shared workbook. I am keen to actually begin implementing some positive changes.	

## Recommendations & Plan for this Session

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Key findings from last session:

1. Clarity of tasks / need for SMART goals
2. Need for better communication/coordination
3. Top Issues / Focus Areas; Finances & Fundraising, Building / Property, Volunteer Recruitment & Management, and Membership Development
4. Recommend changing Short-term Focus Area Groups to: Finances & Fundraising, Building / Property, Volunteer Recruitment & Management, and Membership Development (folding Fundraising under Finances, but all really inter-connected)
5. Identification of Group Coordinators; responsible for project management & communication within and between groups, including those like Council
6. More support/skill development in project management and meeting / group facilitation

Goals for tonight, address the first 5 items mentioned, also learn a process for identifying and creating SMART Goals, figuring out when work on goals should be done by, and who will work on such goals.

### Identifying Short-term SMART Goals

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SPECIFIC    MEASURABLE    ACHIEVABLE    RESULTS-ORIENTED    TIME-LIMITED

Please only work on the FOCUS GROUPS you are most interested in. If you are interested in more than one, then start with the one you are most interested in and then go on to the next. DO NOT! Fill out the WHO column until you are told to. We review all the SMART goals together, first. Goal is to also PRACTICE developing SMART goals.

Focus Area:	Ideas for SMART Goals	When Complete by?	Who willing to work on?
<b>FINANCES &amp; FUNDRAISING</b>	With other groups, address budget shortfall by championing targeted structural operating changes and fundraising events.		(don't answer this until SMART goals complete)
	Develop and implement an information campaign on Planned Giving (bequests and estate giving) with the aim of getting people to plan their affairs to provide funds and/or longer-term monies to BUC.	Info seminar (Jan) Reminder re updating wills (March/April)	

	<p>Any knowledge now who have indicated a plan for this already? Are there members who have indicated to partake in this?</p> <p>Was in funeral ministry, Gloria developed, conversation about planned giving and requests. Changed a lot in past 5 year, new policy was written in 2023. Used to have a place, but not now - too much work. Jim was the one spearheading that. No longer with us. Loss of knowledge.</p> <p>Stewardship looking closely at this. Not just when you die need to look at this. Some webinars done on this. Lots of resources online. All Saints Day talk about legacy. Some interest in Stewardship to do this.</p>	<p>Resources (Sept) Focus on legacy (Nov)</p>	
	<p>Data analysis needed to provide feedback to congregation regarding givings by age group(s) demographic.</p> <p>Where would data come from? Not a lot of access to data.</p> <p>Years ago Ken had access, don't need specifics but by-age ie. mid-70's.</p> <p>Need to address privacy concerns.</p>	<p>FEB 24</p>	
	<p>Provide base data for donations and required donations to meet budget.</p> <p>Limit spending to a balanced budget by 24 AGM, March.</p>	<p>June 24 Feb 24</p>	





	<p>property by either side of the Bedford Highway. Do analysis of building status in terms of expected and planned capital investments required as opposed to general maintenance. Get cost of church construction to better understand “what we have” and how much it may cost to replace.</p>		
	<p>Provide base data re value of properties. Determine cost of land and cost to build a new church.</p>	<p>Feb 24 Jun 24</p>	
	<p>Assessment of weaknesses and strengths of current property/building with a realistic plan to analyze expense of: necessary repairs; mild renovations; major renovations; or major architectural rebuild with new construction Monetizing the current facilities through rentals and community investment Segue to long-term development, consider how the facilities can reach out to the broader community and be useful beyond ‘just’ being a church  Seems ambitious.</p>	<p>I Dec ‘24  I Sept ‘24  I Dec ‘24</p>	
	<p>I see this more as addressing any current maintenance risks that are going to bite us from a safety/compliance point of view.  Interesting no one mentioning changing sanctuary or kitchen.  Talked to other clergy in HRM, not enough. Has to be part of a bigger strategy. Some have had success with that, but need to assess return on investment.  What is the longer term prospect?  Need a real world analysis about what costs would be &amp; ROI. Friends in music, like to have them come in and assess acoustics before tearing out pews. Assess feasibility 1st. Wedding planners, events - assess in next year.  Reconstruction of kitchen, long-term endeavors.</p>	<p>6-12 months</p>	

	From other churches, issue with asbestos. Need to assess this, when change things unexpected things can come up.		
	<p>Create a training / Meeting environment that could be used for businesses - create a multipurpose room</p> <p>S – Create a training / Meeting environment that could be used for businesses</p> <p>M – Budget and plan a room for technology upgrade and marketability, forecast revenue</p> <p>A – Built a project plan – get quotes – fundraise</p> <p>R – Timelines and sales objectives</p> <p>Good opportunity to do more hybrid meetings, some people at home easier to participate, be more inclusive. Also good to know what other businesses / organizations might need to encourage rentals as well.</p>	6 months	

<b>Focus Area:</b>	<b>Ideas for SMART Goals</b>	<b>When Complete by?</b>	<b>Who willing to work on?</b>
<b>VOLUNTEER RECRUITMENT &amp; MANAGEMENT</b>	To identify and communicate on volunteer opportunities, to coordinate gaps, and placements within Council and SF, to solicit, train and recognize the contributions of volunteers.		(don't answer this until SMART goals complete)
	Should volunteer management be put in someone's job description, either Congregational Care or Lead Minister? Or is volunteer organization a unique volunteer role that, for example, replaces the role of "Congregational Care Liaison"??		
	<i>Interested in financial work in general</i>		
	I. Weekly or monthly info in email regarding opportunities to get involved with person to contact. Although this may not seem to generate new volunteers immediately, it increases	Begin in January	

	<p>awareness and prepares people for future activities.</p> <p>2. Weekly messages repeated on BUC Facebook page</p> <p>3. Hold a "Committee Fair" in the porch after worship (advertise for a couple of weeks, food). mid-January feels like good timing. Measure results by the number of people who agree to become involved in different activities. Separately tabulate the number of NEW people, who were not previously involved in any areas.</p> <p>Need to assess current #'s of volunteers to measure difference. Google docs might help, but might need to assess other activities as well.</p> <p>4. Share opportunities with on-line folks the same Sunday as the "Committee Fair"</p> <p>5. Frequently highlight activities of different groups (weekly email, mention during service, perhaps videos before service) so others are made aware of opportunities for fun and fellowship</p> <p>No events listed on website, maybe a form for committees to inform about events, have some one to update website. Maybe google form.</p> <p>Currently, no one to update website, try to do every Katie. Not in staff job descriptions and no volunteer. Goal to get someone. Terry used to be person. Jenn knows how, but so busy.</p> <p>Part of membership goals.</p>	<p>mid-Jan</p> <p>mid-Jan</p> <p>ongoing</p>	
	<p>1. Identify what volunteer work we shouldn't be doing. Is there anything that we can leave aside for the short term, in order to accomplish other activities? Target those folks who would be "freed up" to support gaps.</p> <p>2. Publish a list of the SMART activities that</p>	<p>June 2024, before summer recess</p>	

	<p>we are doing over the next 12 months and any resourcing gaps.</p> <ol style="list-style-type: none"> <li>3. Every week get up in Church and talk about one of the activities and where we need help next. Ok, maybe every other week.</li> <li>4. Do a volunteer recognition event around the time of the AGM, March.</li> <li>5. Evaluate and adopt a volunteer management software tool that is like Constant Contact or something like that</li> <li>6. Create a volunteer manual and a training/welcoming session that can be run twice a year.</li> </ol> <p>Either needs to go into ministry staff position or find a volunteer(s) to do.</p>		
	<p>Utilize our website more - there was talk that we could have a portlet that could be accessed by members - Create profiles review vulnerable sector, seniors and children. Be aware of safety.</p> <p>In museum &amp; gallery world, have 40% more presence online, but no labour / resources to do. Need to avoid tombstone websites.</p> <p>During Covid, something that became more important.</p> <p>Especially important for engaging more youth &amp; families.</p> <p>Made choice to use one platform &amp; do really well, dropped facebook, didn't have labour to keep up and focused on instagram instead and that's where people now know where to go.</p> <p>Maybe a rotation of people and guidelines re: posting. Smaller commitments.</p>	1 - 3 months	

Focus Area:	Ideas for SMART Goals	When Complete	Who willing to work on?
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<b>NEW! MEMBERSHIP DEVELOPMENT</b>		<b>by?</b>	(don't answer this until SMART goals complete)
	<p>Specific: we need to be able to connect with new folks who drop into worship, to keep them engaged; we need to be able to draw folk from the larger Bedford community who come for our community offerings (Hot Spot, Trunk or Treat, Christmas services) into the life of the worshipping community. We also need to engage folks who are already in the pews with small groups, rather than to feel overwhelmed by sitting in a room full of 'strangers'. The staff team has laid our plans for winter 2024 with the intention of offering a variety of small groups to help those already among us to connect more deeply with their spiritual lives and/or their personal interests</p> <p>Measurable: membership development always needs to be on-going, but for the purposes of this exercise, let's say we are looking at adding 20 new families within the next 12 months</p> <p>Achievable: this increase in membership would be visible through PAR givings, participation in the life of the worshipping community such as Sunday school, reading in worship, joining a committee or small group, connecting with others</p> <p>Result Oriented: we are seeing new growth and vitality in the community throughout small groups, committees, numbers of folks in worship in person and online</p> <p>QR codes at Halloween used, another potential tool.</p>	End of 2024	Lead Minister should naturally be involved in this
	<p>Improve BUC growth through better messaging and communications</p> <p>1/ to acquire members</p> <p>2/ to retain members</p> <p><b>SPECIFIC</b> <b>ReBuild Communications team and Develop Plan</b></p>	Team in place by end of January 2024	

	<p><b>MEASURABLE</b> 5 people min on team, traffic increase on social media</p> <p><b>ACHIEVABLE</b> Yes!</p> <p><b>RELEVANT</b> Messaging to internal and external peeps builds community</p> <p><b>TIME-LIMITED</b> Team in place by end January 2024</p> <p><b>SPECIFIC</b> The communications Team at BUC took a hit during Covid, with remaining team lead supported by one member. The main project for 2022 was the rebuild of the BUC website and moving the worship service to Youtube. Now it's time to build community with other platforms.</p> <p>Volunteers – tap our volunteer base for photographers, videographers, writers, storytellers, digital media users, and people who are keen to play with their cell phone!</p> <p>Digital Infrastructure – survey to see what is already in place (email, FB main, FB Family, FB Makers) and where there are gaps (text, Instagram, Tiktok). Exploration to see what services would help (Hootsuite, content calendar, google analytics, UCC resources) Tech experts – who is in house?</p> <p><b>MEASURABLE</b> Digital media is labour intensive and requires a broad base of skills from tech to content, beginner to expert. A small but mighty group can accomplish much. 5 members minimum.</p> <p>Posts on the main BUC FB page (and co-opted for others) increase by 3 per week – a BUC story/blog, weekly sermon/reading prep, and events. Track engagement.</p>		
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	<p><b>ACHIEVABLE</b> Yes! Basic digital engagement skills are something that many members already have. Social media posts can be quick and easy, and a buy-in from all teams to promote their work will easily populate our feeds.</p> <p><b>RELEVANT</b> Building community requires communication. We can't know our neighbour, internal or external, if we don't engage with them. BUC is large enough that not everyone can easily know everyone else, especially if they are only engaging on Sunday mornings. Religious organizations widely vary in messaging around theology and social engagement. Someone is looking for this community. How do they find it if they don't get told about it? Often BUC teams are in silos and working harder than they would if information was shared widely.</p> <p><b>TIME-LINE</b> A concerted effort of seed planting during Advent, followed by active recruiting in January should garner 5 members. There are past members who could be revisited, and new members who could be approached. Posts on existing platforms to begin in the New Year following tech survey re: permissions, passwords, etc.</p> <p>Goals Not developed yet Develop church visitor follow-up strategy Bring a Friend Day Revamp visitor cards Partner with local organizations Develop Branding strategy Develop Marketing strategy</p>		
	<p><i>Interested in welcoming and connecting new members</i></p>		
	<p>I. Re-introduce Pew Cards so that new people</p>	<p>Quickly, to</p>	



	<p>who attend Sunday service have an easy way to be noticed.</p> <p>a. Develop new pew cards, perhaps handed out at door</p> <p>b. Re-establish team to follow-up</p> <p>2. Intentionally connect with on-line folks</p> <p>Process when someone new filled out card.</p> <p>When Covid hit, fell apart.</p>	<p>capture Christmas crowd</p>	
	<p>I think that we could offer some personal development/skill development/spiritual development opportunities for members - we have so many talented people in the congregation. People love that feeling that they are going deeper on certain topics. So like one course per “semester”. Build up a roster (this would be with the volunteer folk)</p>	<p>September 2024</p>	
	<p>1.utilize data from 2022 wellness check in phone calls and determine whether the notes made from those calls were used to update the membership numbers.</p> <p>2. Determine whether new memberships or transfer of memberships is occurring into the membership spreadsheet</p> <p>3.in discussion with CDC determine of Family Ministry Lead and determine whether families that are involved with the Sunday school and youth programs are actually BUC members</p> <p>4.develop a process to update our membership list strategy</p> <p>5. Determine a recruitment strategy or a feedback process for the online community to determine the numbers as to whether or not our online community are BUC members</p> <p>Something to check about families &amp; youth, whether members</p> <p>How do we track families or individuals who attend BUC but are not members?</p>	<p>Spreadsheet in 2 months, update</p> <p>Have conversation with ministry team</p> <p>3-6 months for rest</p>	
	<p>1. Get a digital sign for the front to communicate</p>	<p>3-6 months</p>	

	<p>more to the driving community. Feature activities and events          Have a digital marquee on the website with activities</p> <p>2. S – Increase Community involvement</p> <p>M – Usage of Crossing</p> <p>A – Training for pizza oven, regular night fire and community meal</p> <p>R – increase people coming to church and donations for services</p> <p>T – 6 – 12 Months</p> <p>Was a crossing team, hit during Covid, haven't met for awhile. Last was developing guidelines. Revamping team would help.</p> <p>Looked at years ago, over \$100k, but be great to have. Easier to update.</p> <p>Crossing, getting things to last. Cheaper, put a light on it. Relinquish copyright and have why was created.</p>		
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**Identifying Group Coordinators**

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Group Coordinator(s) ideally should be a couple of people so the role can be shared and if one person can't be at all meetings, etc then the other can, and ideally this is the only role they will play - unless they are sure of their capacity to do more.

The PURPOSE OF THE ROLE is to oversee project management related to the SMART Goals in each Focus Area, and communication within and between groups to ensure everyone is up to date on what is happening and progress towards goals, or if help is needed because someone(s) can't follow through on a goal. Communication should include both SYNCHRONOUS (like meetings where everyone is together) and ASYNCHRONOUS (distribution of meeting minutes).

Group Coordinators will also be responsible for identifying duplicate SMART Goals from this document, and collating data for their groups so each group has a clear plan of what they will be working on in the

New Year, what the timelines for action will be and who will be working on what. They will also be responsible for calling / arranging any future group meetings, and identifying any group volunteer needs and communicating those to the Volunteer Recruitment & Management Group.

Group / Focus Area	Names (ideally 2)
Short-term Group Overall	
Finances & Fundraising	
Building / Property	May commit after next meeting with long-term committee
Volunteer Recruitment & Management	
Membership Development	

\*\*May need another group for Communications & Engagement. Has come up in more than one group.

### Closing Check Out

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Anything stand out for you this week / session? How are you feeling?	Anything stand out for you this week? How are you feeling?
	<p>I am pretty impressed with the laser-sharp contributions of this group. And what they left out.</p> <p>We probably need to drop some of these goals, really, with the resources that we have. How long would it take us to figure out that we don't have the people to accomplish some of these goals? That activity could cause delay.</p> <p>So much competence and inspiration, but I do note we lack project management, at this point. Maybe it will come!</p>
Very ambitious - same people who have been involve all along; we need more assistance to achieve some of these goals.	
Hope we can develop some momentum. Wish there was an area for anonymous comments. Think Page	

should be asked to join in	
Progress is being made. More commitment needed	
A-OK tonight, results TBD	We progressed quite nicely ! Feel the goals need to be tightened up a bit. Also think that we may have further interest in the congregation for short term volunteer help.
This group really sees BUC as it is, I believe, but I am unsure whether a group this small can tackle these focus areas with sustained energy. This feels like an effort towards revitalization; perhaps transformation is the long-term group's goal? From my perspective, the short and long term goals need to be incorporated into updated or tweaked job descriptions for every member of the BUC staff.	I feel like we have alot we want to accomplish, but need a priority of goals so that we can focus on short term. It is important that we are able to start and finish goals and show results for short term. Also we need a way to bridge future goals to be deliver to this committee what is coming up and how to transition to our group and what to take on. Some sort of governance.
Lots of work ahead, but clearer. The homework on SMART goal generation was helpful. Small projects seem likely, overall management not filled - daunting?	
Feeling great. Impressive and ambitious	Lots of good, actionable ideas. Seems like a lot of structure for a small group of people. If these focus areas are composed only of the 11 people in attendance tonight, seems like there should be more efficient ways to communicate with each other.

**Thank you & Next Steps!**

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If you said you were interested in the LONG-TERM Group, someone will be in touch about the other meeting date on Monday, December 4th at 6:30 to 9pm.

The JAM Group will also get copies of the recording, transcript & chat notes from this session.

After the last session in this phase of work, I will also develop recommendations and a proposal for how I might be able to support groups continuing their work in the New Year.

## Appendix C

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### Sustaining & Transforming Bedford United Church

Dec 4th 2023, Workshop #3 with Chutzpah Consulting, Laurie Cook

\*\*No names included.

## LONG-TERM WORKBOOK

### Grounding

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### How to use a Google Doc

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If you lose connection, or I freeze, you can leave the zoom call for a bit and then use the same zoom link to get back in. If I'm still frozen or not on, give me 5 min and then try again.

If there is still a problem, and you don't know what to do, you can call me at 902-209-6838.

### Who is here?

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Please look for your name and put your cursor in the box beside your name and type and answer the question at the top.

Thoughts from session 2 weeks ago? Or from Bus Article?	Thoughts from session 2 weeks ago? Or from Bus Article?
	Bus article excellent. A clearer picture is emerging.
Good - I circulated my 'article' to most of you	Feel like there is some momentum. Echo about Bus.
I very much enjoyed the article. And happy to say that Grant is a long term personal/professional friend of our family. I know where he "is coming from".	I apologize I haven't had a moment to read the Bus article. The good connections growing among the folks at BUC who want to engage the project of what BUC is becoming/can become is exciting for me.
Bus article was a good review emphasizing external engagement....the value of it and how to do it successfully.	<ul style="list-style-type: none"> <li>● Where are we going and where are we NOT going?</li> <li>● How do we distinguish ourselves from others in the field?</li> <li>● How effective are we in what we do?                             <ul style="list-style-type: none"> <li>○ Aside: what do we do??</li> </ul> </li> </ul>
	Enjoyed the Bus article. Very familiar with generative concepts, on the ground strategic initiatives. Purpose (mission) and values driven. Connected to what is happening.
I took a class with Gareth Morgan during MBA studies at York U. many decades ago. Interesting to read some of his ideas again. The idea of a generative mode is very interesting and relevant to our situation.	Governance seems like a real meaty piece that is necessary and will support the visioning/transformation, but it is a bit opaque for us. Like how do we bring that along. People get bored to death/are de-energized by it.
Appreciative to Andrea and Laurie for keeping us moving. Re: Bus article. Definitely need to get off the bus!	
	We are getting ready for something big to come, interested to find out more

**FYI, SHORT-TERM Group**

- 
- Clarity of tasks / need for SMART goals
  - Need for better communication / coordination

- Focus Area Groups:
  - Finances & Fundraising,
  - Building / Property,
  - Volunteer Recruitment & Management,
  - Membership Development, and
  - There was a suggestion of New! Group for Communications & Engagement
- Identification of Group Coordinators; responsible for project management & communication within and between groups, including those like Council
- More support/skill development in project management and meeting / group facilitation, and
- Identified reviewing staff job descriptions as key to help resource action on new SMART Goals

**Current LONG-TERM Groups should also be re-evaluated after this session.**

Strategy / Process, Research, Grants, Communication

## Visioning

<p><b>Visioning</b></p> <p>It is 5 years in the future, a reporter is writing a story about BUC.</p> <p>What would you want that story to say about the changes BUC has made in the last 5 years, and how those changes have helped it to contribute more and have a bigger impact in its community?</p>	<p><b>What would it take to make this vision real? What could be some next steps?</b></p>	<p><b>Who interested in working on what?</b></p> <p>PLEASE DON'T! fill out until we review answers to other questions together.</p>
<p>TRANSFORMATION WORKING WELL</p> <p>As Bedford United Church came out of the pandemic they decided to transform their ministry.</p> <p>During the pandemic, they had developed an excellent online presence, which included many who were not able to get out in person or who lived too far away (ie. Toronto). "The Crossing" (the outdoor pizza oven space) hosted events for BUC &amp; the community.</p> <p>Today, they have become a busy community hub where love and kindness are offered to all comers and well appreciated.</p>	<p>FOR THIS TO HAPPEN ... WE NEED TO</p> <p>Find people to head up the renovations, fund raise for them, find grants, and do them we already have links to some of the above, ie Bridging the Gap,</p>	

<p>The congregation still meets weekly for worship (with extra services of worship when wanted - ie funerals, weddings, receptions) but is open all week for various community activities.</p> <p>Growing Go is a group offering care for autistic children. It meets daily all year. The AIA non group meets weekly. The Seniors' Coffee Group meets weekly. The Korean Christian congregation shares the space on Sundays. Youth groups, choirs &amp; children/s events thrive, on Sundays and through the week.</p> <p>The former sanctuary has become a performance space as well as for worship services.</p> <p>Bedford does not yet have a 'performing arts centre' so BUC offers an acoustically first rate place to offer plays and musical events.</p> <p>A parish nurse is on site most days to offer blood/urine services, blood pressure, consultations, etc.</p> <p>Other weekly or monthly community and church groups use the facilities in the evening.</p> <p>The kitchen has been upgraded to meet safety inspections and the 'Bridging the Gap' team is beginning to offer services onsite for disadvantaged folk</p>	<p>music, play people, retired or active nurses</p>	
<p>The current sanctuary is an architectural jewel and is the hub of a vibrant community/cultural centre that "BUC" uses as a place of worship as needed. After careful assessment, the remaining architecture is either torn down and/or rebuilt to have multi-purpose spaces that are of full community value. Reconsider the entire property with an ethical developer that maximizes income potential in the real estate, go vertical as possible. Make "BUC" an useful, vibrant 24/7 site for spiritual and social purposes for people of all faiths, classes and identities.</p>	<p>Old-school SWOT analysis on the properties. I'd like to bring in musician friends and performers to get their sense of the acoustics of the sanctuary, is it even viable as a performance space. This is but one stress test for the facilities. What are the future assets and</p>	



	<p>what are the liabilities that could 'sink the ship'?</p>	
<p>BUCCommunity hums with people and activity that benefits people of all ages in the community. It has grown beyond the description of a church to a center for personal and spiritual growth and wellness. This organization has moved from a place of struggling finances and other resources to an organization that not only pays its own bills but is able to support other groups. Youth , seniors, parents and singles all find comfort and the ability for growth from the various programs and services represented.</p>	<p>Need to carry out an organized and coordinated external engagement with other organizations, community and thought leaders and municipal and possibly provincial governments. From this we want to pull out what the needs and opportunities are of the community. This would inform what BUC could be.</p> <p>At the same time, others would develop and carry out internal engagement, probably through our survey process and perhaps a workshop.</p>	
<p>The BUC facility is utilized for many hours on most days of the week by a variety of community organizations which contributes to financial security for the congregation. Members of the congregation are inspired to be involved in the work of the congregation because involvement supports their personal growth goals and contributes to strengthening and improving the Bedford community.</p>	<p>Need to find out what needs exist in the community in order to learn what organizations may be interested in joining forces or</p>	<p>My intention tonight was to learn how the LT group would be organized before exiting this group in favour of one or</p>

	<p>using the BUC space.</p> <p>Understand the interests and passions of congregation members in order to know what would energize their involvement. This is related to the Volunteer Recruitment and Management Short Term group.</p>	<p>two of the ST working groups. That remains my intention.</p>
<p>BUC has become known as a haven for the spirit supporting the mental and spiritual health of the community.. It's known as an organization through which the community supports others.</p> <p>The building is fully-used, coordinating with other non-profit organizations or charities. BUC volunteers do not deliver all the programs, though BUC provides the structure/framework for this collaboration. We've become a well-oiled machine, with many volunteers floating into and among roles so the work is shared among many.</p> <p>{I should have just written "ditto" under Val's!!}</p> <p>Building on Matt's comment on communication: have webpage created to keep congregation informed?</p> <p>How do we combat mis-information or misunderstanding moving forward?</p>	<p>Determination of mechanism/governance between L-T and S-T (what's the approval process, criteria, how do we share info);</p> <p>Plan for engagement to collect more specific ideas ....external and internal.</p> <p>Research difference organizational structures that could be available thru which to bring our vision to fruition (thinking here of charity status, foundation, etc.) What do we need to create our vision?</p> <p>Need to come up</p>	<p>Contributing to governance</p>

	<p>with way to discuss ideas where we diverge and determine how we move forward</p> <p>Need to document how this process is working so we don't recreate the wheel</p> <p>Research on volunteer trends and evaluation of our volunteer needs in relation to various vision options.</p> <p>Communication plan for congregation.</p>	
<p>The Dying to Resurrection Story</p> <p>It is 2028, and I need to tell you the former Bedford United Church has transformed itself into a vibrant large community. Several United churches decided that their longevity and contribution to society would be best served by combining their resources and talents. All church properties were sold and a modern alternative-abled building was built that would have sufficient ministerial staff, volunteers and financial stability to implement their chosen programs. A new governance model, that was supported by the congregation, was put in place. A new Mission, Vision and Strategic Plan, supported by the congregation, was put in place. The new church increased membership by hiring a growth-oriented Lead minister with four support ministers. The new church initially concentrated on the church community. The new church used the 'rifle' approach in selecting a limited number of programs and implemented them. I am pleased to report that the new church is financially stable, has a large membership and is serving the larger community.</p>	<p>Find leadership for ST and LT.</p> <p>Form small groups to implement projects.</p>	
<p><i>I'd like to say that the spirit presented itself to BUC and that as a community we made some hard and at times very difficult</i></p>	<p><i>Alternatives need to be studied.</i></p>	<p>Alternatives Renovate</p>

<p><i>choices.</i></p> <p><i>Expenses were minimized but with a view to right -size as soon as we were more financially in balance.</i></p> <p><i>Both the men and women of BUC together and separately stepped forward at that time, and since then, with a vision and committed purpose of creating a strong and vibrant Christian community.</i></p> <p><i>The best part of what happened back then in 2023 and 2024 was that differences of opinions were expressed but that, as if by magic, they vanished as the group of folks who gathered at that time faced the uncertainty of the future with a commitment to succeed. It was an amazing time.</i></p> <p><i>Older folks contributed more of both their time and talents, inc \$\$\$\$ and the best part was that despite all of the distractions of the day such as email, streaming and internet stuff the young set that all aside realizing and appreciating the leadership and courage of the older folks.</i></p> <p><i>It was a really amazing time of huge challenge and change and it ended in a wonderful outcome.</i></p> <p><i>What can I do?</i></p> <p><i>Anything I can.</i></p>	<p><i>Financial stability is paramountly important.</i></p> <p><i>So alternatives to slow demise need to be explored.</i></p> <p><i>New Build</i></p> <p><i>Lease</i></p> <p><i>Reduced service level</i></p> <p><i>Increased service level</i></p> <p><i>Set priorities of what we do?</i></p> <p><i>Are we first of all:</i></p> <p><i>A spiritual community</i></p> <p><i>Or are we a social club?</i></p> <p><i>It is important that we really understand our “who we are” question.</i></p> <p><i>Is Christianity a needed value of expression in our society or is it in a serious slope of decline.</i></p> <p><i>The new lead minister is key to our long term direction and health.</i></p>	<p>Build New</p> <p>Amalgamate</p> <p>Lease</p> <p>Bob</p> <p>Peter</p> <p>Studying current market value of our property.</p> <p>Getting professional opinions of alternatives in this area.</p>
<p>I’m most interested in reading what other folks envision for us than chiming in; although for me as an ordained minister, I am interested to know whether the positive changes this group envisions are grounded spiritual belonging to a faith community, or come from a secular belief in moral duty. That is to say: is BUC looking for an executive director or a minister? Or both? Is being a community of faith of interest to BUC in 5 years, or is the movement towards becoming a not-for-profit organization that is no longer part of the United Church of Canada?</p>	<p>Clearly define the goals of Short and Long term sustainability groups, as distinct in purpose and vision. *If* we are successful in recruiting volunteers– which is key to both</p>	

	<p>groups– I would like to see this group begin by looking at the monies available through the United Church of Canada to kick-start or underwrite so many of these projects. Further to that, I can't quite envision yet or is already written in this column</p>	
<p>BUC has become a leader for equity and social justice in HRM and a community hub for Bedford.</p> <p>Renovations to the third floor have created office space for a Nurse Practitioner as well as other health professionals. The renovated kitchen is providing hot meals to those in need 3 days a week and works as a food bank 6 days a week. The building is bustling, with rentals running nearly every evening and most weekdays, including music and theatre groups using the updated sanctuary.</p> <p>BUC has also become one of the louder voices in Halifax social justice circles. The church has spoken out against poverty and homelessness in the HRM and members of council have been part of working groups to find solutions to these issues. The church has continued to build a strong relationship with Al-Rasoul, offering interfaith services throughout the year. There is also an active youth group that has been working closely with 2SLGBTQ+ organizations. BUC has also taken the lead on initiating multiple inclusivity initiatives for the including Decolonized Faith and AntiRacism.</p>	<p>It would take convincing the congregation that the status quo is not an option (<b>communication</b>)</p> <p><b>Research</b></p> <ul style="list-style-type: none"> <li>- Identify community needs</li> <li>- identify potential partners</li> <li>- review current affiliations and obligations</li> <li>- viability of current facilities</li> </ul> <p>RE: needs</p> <p><b>Grants</b></p> <ul style="list-style-type: none"> <li>- identify potential funding</li> <li>- identify potential rentals</li> </ul> <p><b>Process</b></p>	

	- Update facilities to meet needs	
<p><i>BUC in 2028 is a thriving, multi-generational, all-inclusive, affirming church which continues to have roots in the community as it evolves in an ever-changing world.</i></p> <p><i>BUC has shown the way forward in how to be a vibrant, faith-filled church rooted in trust in GOD and resilience. With a clear understanding that with a belief in the divine and connection to one another, the impossible is always possible.</i></p> <p><i>Through the challenges and willingness to face what is current while always looking to a future which INCLUDES rather than EXCLUDES, BUC is relevant and continues to thrive and stays grounded in a possibility of a world where peace and the highest good is often incomprehensible and yet is immensely practical.</i></p> <p><i>It continues to offer a place where community can come together and finds ways to join hands with the broader community in which its members live.</i></p> <p><i>Healing, wholeness and faith are fundamental to the core beliefs.</i></p>	<p><i>Create a vision statement</i></p> <p><i>Review the Mission Statement to see if it supports the vision statement</i></p> <p><i>Communicate both the Vision Statement and the Mission Statement to the broader community</i></p> <p><i>Establish working groups for moving forward</i></p> <p><i>Establish divergent/convergent processes</i></p>	
<p>BUC has transformed from a group of passive prescribed values-consumers, to a group of dynamic value-leaders in the local community who make connections and engender creativity and meaningful growth. Members and leaders of the organization are Christians and from other faiths who align with Bedford United’s (notice, no “church) explicit and inclusive statement of purpose having to do with community social justice. Community leadership is driven by intergenerational “people development” where skills are valued, developed, recognized and freely and purposefully transferred to others. Volunteers and staff alike participate in a cycle of meaningful development and support. Other local community organizations look to Bedford United to help them to train and energize their own volunteers through BU’s outreach and in-house education programs.</p> <p>Bedford United’s physical space provides wraparound support for a limited number of folks who require it. Core activities are to provide food programs of various types (gardening, cooking classes, grocery budgeting). BU has a community garden, and several physical shelters on the property where people can sleep independently 4 seasons of the year. A shelter on the property</p>	<p>We need to explicitly agree on the vision and short-term priorities and God help us stop doing the things that don’t contribute to that sustainability/viability and flourishing.</p> <p>We need to communicate the vision and priorities and magnetize more effort/energy beyond this group.</p> <p>We need to learn</p>	<p>So I am talking to and about myself here....</p> <p>I am so worried about volunteers and staff. I feel like this is where I want/need to spend my energy, even though this is only tangentially related to all things long-term and visioning, which is really where I am most comfortable</p>

<p>offers physical shelter during the day – warmth, simple showers, running water, lockers for belongings, a shed for bicycles and propane tanks and outdoor stoves. During the day, BU offers care for pets and children when its term residents need to go to work. There are parking spaces designated for people who are living out of their vehicles. These supports are managed in cooperation with HRM.</p> <p>Inside the main building, BUC is a thriving arts and creative centre. There is a permanent art gallery with revolving exhibits that showcase in particular local talent, a woodworking shop with tools for repair and building and skilled volunteers/staff to assist/train folks. There is a “Makers” centre, where people can come to knit, quilt, repair, and sew. An art studio has a program for children and adults to learn and practice in various media. There is a recording studio with good acoustics and equipment worthy of recording podcasts and short digital film. Workshops are regularly run in each of these spaces.</p> <p>The facility has a number of rooms of different sizes that can be rented for meetings of various types that are technology-enabled. We can cater through our commercial kitchen offerings of simple, healthy food. We have a classroom that is dedicated to teaching. There are smaller rooms that are used for one-on-ones that are video-monitored. These can be used for teaching voice and instrument.</p> <p>There is a performance space that doubles as a worship space for various denominations. There are garage doors at the Bedford Basin end that open in good weather to the outdoor space, which has some wild areas and exploring paths. From the Bedford Highway, Bedford United is obviously a meeting place. There are wide stairs from the highway to the garage-door entry.</p> <p>On Saturdays we have a local market in the parking lot, or in the performance space in bad weather.</p> <p>The parking lot has a fast charger for electric vehicles. People can exchange propane tanks for a sliding scale price. There is a solar-powered refrigerator and a freezer.</p> <p>Folks in Bedford---students, retirees, people from all walks of life, love to be involved in the organization/come to the “place” because they learn practical skills that they can use in other areas of their life. Their volunteer-ism and internships are</p>	<p>how to break these projects down, own, delegate, lead, execute. Finish, celebrate, document And MOVE ON to the next thing.</p> <p>Probably a change in governance required.</p>	<p>operating.</p> <p>Could someone else please take on the leadership of the long- and short-term groups, or else step up to lead the volunteer recruitment?</p> <p>I can't do it all, I feel like I really need to focus on something meaningful and helpful. Not that I am that good at it or knowledgeable /skilled, but there is a gap here.</p>
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<p>time-boxed, recognized, and they receive feedback on the arc of their development as a volunteer.</p>		
<p>Space is being used and rented out throughout the week, Teens have a place/space where they can access tutoring, pc and access other resources. It would be great to have an outdoor space that the children can run around in, the rocky place in the back lot for more recreational activity outside to deepen the spiritual connection outside.</p> <p>Nice to have a community pantry outside in the crossing for people to get food when in need. Have a digital sign outside displaying events and activities. Summer Ice cream booth, like holy cones in Cole Harbour, as we have great community seating at the crossing. We take a more active role in social justice through the arts offering movies, plays and other mediums to educate all ages.</p> <p>Continue being the spiritual space for all to join. Focus on our ties and continue to seek understanding of our friends in the community of faith.</p> <p>Understand relationships better with our neighbours.</p>	<p>Conversations in the community, reaching out to other churches that maybe doing or have what we want to offer.</p> <p>Develop project plans and put together starting plans and prepare a vision for short-term group to execute</p>	

**Identifying Group Coordinators, for LONG-TERM Group**

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Group Coordinator(s) ideally should be a couple of people so the role can be shared and if one person can't be at all meetings, etc then the other can, and ideally this is the only role they will play - unless they are sure of their capacity to do more.

The **PURPOSE OF THE ROLE** is to help coordinate activities and communication within and between groups to ensure everyone is up to date on what is happening and progress towards goals, or if help is needed because someone(s) can't follow through on a goal. Communication should include both **SYNCHRONOUS** (like meetings where everyone is together) and **ASYNCHRONOUS** (distribution of meeting minutes).

Group Coordinators will also be responsible for identifying key themes and areas for action from this document. They will also be responsible for calling / arranging any future group meetings, and identifying any group volunteer needs and communicating those to the Volunteer Recruitment & Management Group.

**Who is willing to be Group Coordinators, for the LONG-TERM Group?** (for the next 6-12 months)



<b>Names</b>

**Closing Check Out**

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<b>Anything stood out for you this session? How are you feeling?</b>	<b>Anything stood out for you this session? How are you feeling?</b>
	Progress slower than other meetings. Concerned with the lack of people accepting leadership.
	More focused than previous sessions
We seem to be coming together as a team. Its clear there is so much work ahead of us!	Many folks are interested in transforming Bedford United - exciting!
	Appreciate the energy being generated and aware that health challenges are dominating all my current choices - already quite committed as a volunteer at BUC
ST Volunteer Recruitment feels like the best place for me	
I need to think through the governance piece.	

**Thank you & Next Steps!**

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The JAM Group will get copies of the recording, transcript & chat notes from this session.