

Strategic Direction #5 (below) was not approved by the congregation, but was deemed necessary by the BoT last year. The BoT is acting upon this Strategic Direction and will likely put it before the congregation (if deemed necessary) at the next regularly scheduled annual meeting.

5. Live out our vision and mission through transformational giving and sound financial planning and management.

Operational definition: Transformational giving

Transformational giving rises from a deep and awakening sense of purpose and personal values. It is a reciprocal process that lifts both the giver and receiver through connected purpose and passions. The transformational gift connects the giver with the congregation at a deep level and results in opportunities for growth and sustainability that are mutually satisfying and meaningful. In its highest form, the dualism of giver and receiver is no longer apparent, because they become one and the same.

- a) Give generously of our time, talent, and treasure.

Outcomes:

1. Cedar Lane has adopted a culture of transformational giving, in which participation and volunteering has increased.- M
2. Members know how to bring their talents to the work of the congregation. - M
3. Income from pledges, gifts, legacies, and fundraisers increases sufficiently each year to meet or exceed increases in expenses.- B

Measure:

1. A Development and Fundraising Committee of the Board has been created.
2. The Development and Fundraising Committee has developed, and the Board has approved, a 5-year plan for development and fundraising that includes assessment of both income and expenses.

3. Progress toward achieving the 5-year development and fundraising plan is being measured and monitored via an annual report from the Development and Fundraising Committee to the Board of Trustees.

- b) Create and follow a path toward financial stability by planning for and managing our resources through responsible stewardship.

Outcomes:

1. Cedar Lane has a balanced operating budget by beginning of Fiscal Year 2022, and has established a capital reserve fund to maintain and improve our facilities. - B

Measure:

1. By 2022, the church adopts an operating budget where current income meets current expenses.
 2. There is demonstrated improvement towards measure #1 through a reduction in the deficit each year.
 3. By 2022, earnings from the endowment are used for capital improvements to Cedar Lane's facilities, for establishing and building a capital reserve fund, and for initial investment to support new initiatives that further Cedar Lane's mission and vision.
2. Cedar Lane has the financial resources available to achieve its mission. - B

Measure:

1. Progress toward accomplishing outcomes and achieving our strategic directions has not been impeded by a lack of resources
 2. Paid staff are being compensated at a level consistent with or greater than UUA guidelines.
 3. Cedar Lane maintains the ability to borrow money to address unforeseen circumstances.
- c) Create and implement a comprehensive asset management plan that includes funding annually into a replacement reserve that anticipates ongoing capital needs over a 20-year period.

Outcome:

1. Cedar Lane has the funds in place for capital needs as they arise.- B

Measure:

1. A comprehensive asset management plan has been developed and is being implemented to ensure that Cedar Lane is funding a replacement reserve that will be able to pay for ongoing capital needs over a 20-year period.