



Washington Ethical Society
A vibrant humanistic congregation

WES Strategy Saturday

January 26, 2019 | 9:00AM – 4:30PM

Welcome

- Welcome
- Housekeeping & Guiding Principles
- Overview of the Day
- Introductions

Board Q&A Session

- **Lauren Strange**, President, Board of Trustees
- **Contact Information:**
 - **Board of Trustees:** board@ethicalsociety.org
 - **Board + Amanda:** EmailToBoard@ethicalsociety.org
 - **Lauren:** laurens@ethicalsociety.org

Centering

- **Amanda Poppei**, Senior Leader

Developing SMART Goals

- **Kristin Hunter**, Board Member



Specific



Measurable



Attainable



Relevant



Timebound



SMART Framework

- **S**pecific
 - What exactly do we want to achieve?
 - Where, how, when, with whom?
- **M**easurable
 - What will we see, hear, and feel when we reach our goal?
- **A**ttainable
 - Do we have (or can we realistically acquire) the time, talent, and resources to achieve the goal?
- **R**elevant
 - Why do we want to reach this goal?
 - Does the goal advance us closer to where we want to be?
- **T**imebound
 - Have we set a realistic and specific deadline for the goal?

2018-2019 Mid-Year Review

- **Trang Duong**, Board Member
- **Amanda Poppei**, Senior Leader

FOCUS Goal #1

Increase awareness of the financial resources required to sustain and grow WES, empowering members to act as dedicated custodians of WES' future, as measured by an increase in pledges and financial contributions.

1. Offer Wisdom Path
2. Facilitate legacy matching gift program
3. Develop monthly financial statements (visuals)
4. Repeat the Vision & Budget Summit – March 2, 2019
5. Visit members for 2019-2020 annual operating drive
6. Develop WES history panel
7. Engage SEEK children

FOCUS Goal #2

Dedicate the time and resources required for WES to become an increasingly anti-racist, anti-oppressive, multicultural, inclusive congregation, in alignment with the results of the multicultural, anti-racism assessment and plan developed through the 2017-2018 focus goal.

1. Conduct ARAOMC Audit and Assessment Team Work
2. Obtain anti-racism training for the Board
3. Conduct anti-racism/multicultural/intercultural competency trainings at WES
4. Schedule one POC platform speaker per month
5. Conduct intercultural competency training
6. Update Hiring Policies and Practices with an ARAOMC lens
7. Develop policy for “free rentals”

FOCUS Goal #3

Enhance engagement initiatives to inform and connect all WES members, feeding their spirits and sparking their connections to the community under the direction of a new, dedicated membership coordinator.

1. Secure grant to fund Membership Coordinator
2. Develop job description for Membership Coordinator
3. Refine Path to Membership series
4. Work with Lay Leadership Development Committee

Focus Goals Review

Goal #1	Increase awareness of the financial resources required to sustain and grow WES, empowering members to act as dedicated custodians of WES' future, as measured by an increase in pledges and financial contributions.
Goal #2	Dedicate the time and resources required for WES to become an increasingly anti-racist, anti-oppressive, multicultural, inclusive congregation, in alignment with the results of the multicultural, anti-racism assessment and plan developed through the 2017-2018 focus goal.
Goal #3	Enhance engagement initiatives to inform and connect all WES members, feeding their spirits and sparking their connections to the community under the direction of a new, dedicated membership coordinator.

Sticky, Not Stuck

- **Lauren Strange**, Board Member
- **Amanda Poppei**, Senior Leader

Sticky Community

- People can connect quickly into the community
- It's easy to find out about groups and there are low barriers to entry
- People feel accountable to others
- Higher % of visitors become members
- Higher % of new members become leaders
- Members notice and check-in when others disengage



Stuck Community

- Reluctance to transfer leadership roles
- Community feels cliquish
- Unhealthy feelings of ownership = entitlement
- Community cares most about long-term members
- Driven by individual concerns
- Resistance to change
- Culture does not allow growth



Personal Reflection

- What helped you get sticky at WES?
- When have you felt stuck?

Thinking About WES

- In what ways is WES a sticky community?
- Where have you experienced WES as stuck?
- Where do we have the most capacity to get unstuck or enhance stickiness?
- How could we leverage a Sticky Coordinator?
- How should we address demographic differences?

WES Resources

- **Margaret Conway**, Board Member
- **Amanda Poppei**, Senior Leader

"Don't tell me what you value, show me your budget, and I'll tell you what you value."

- Joe Biden

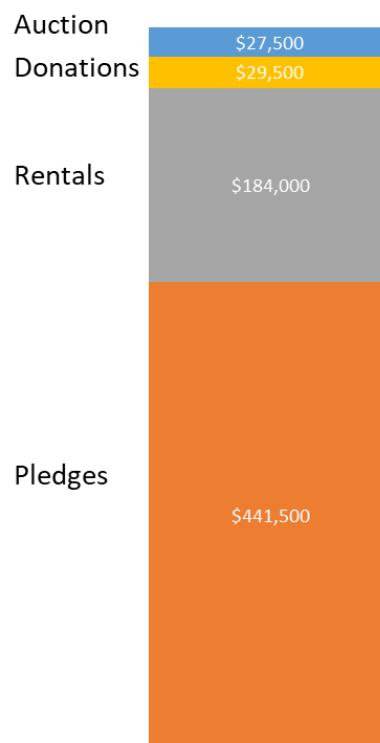


Revenue & Expenses

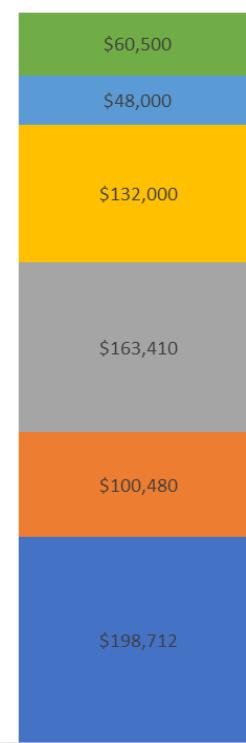
2017-18



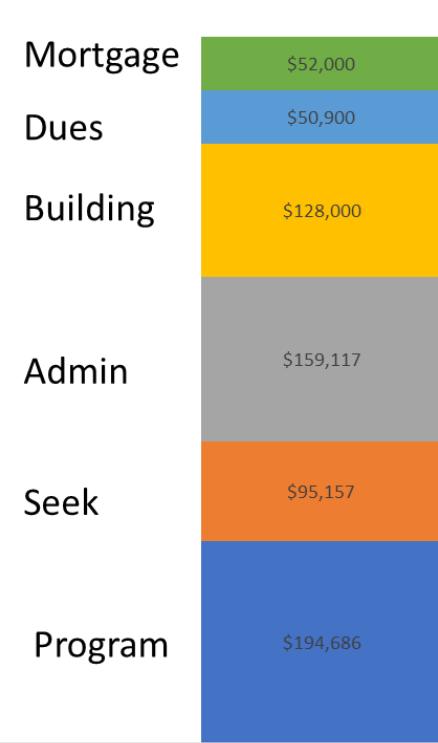
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2017-18



2018-19

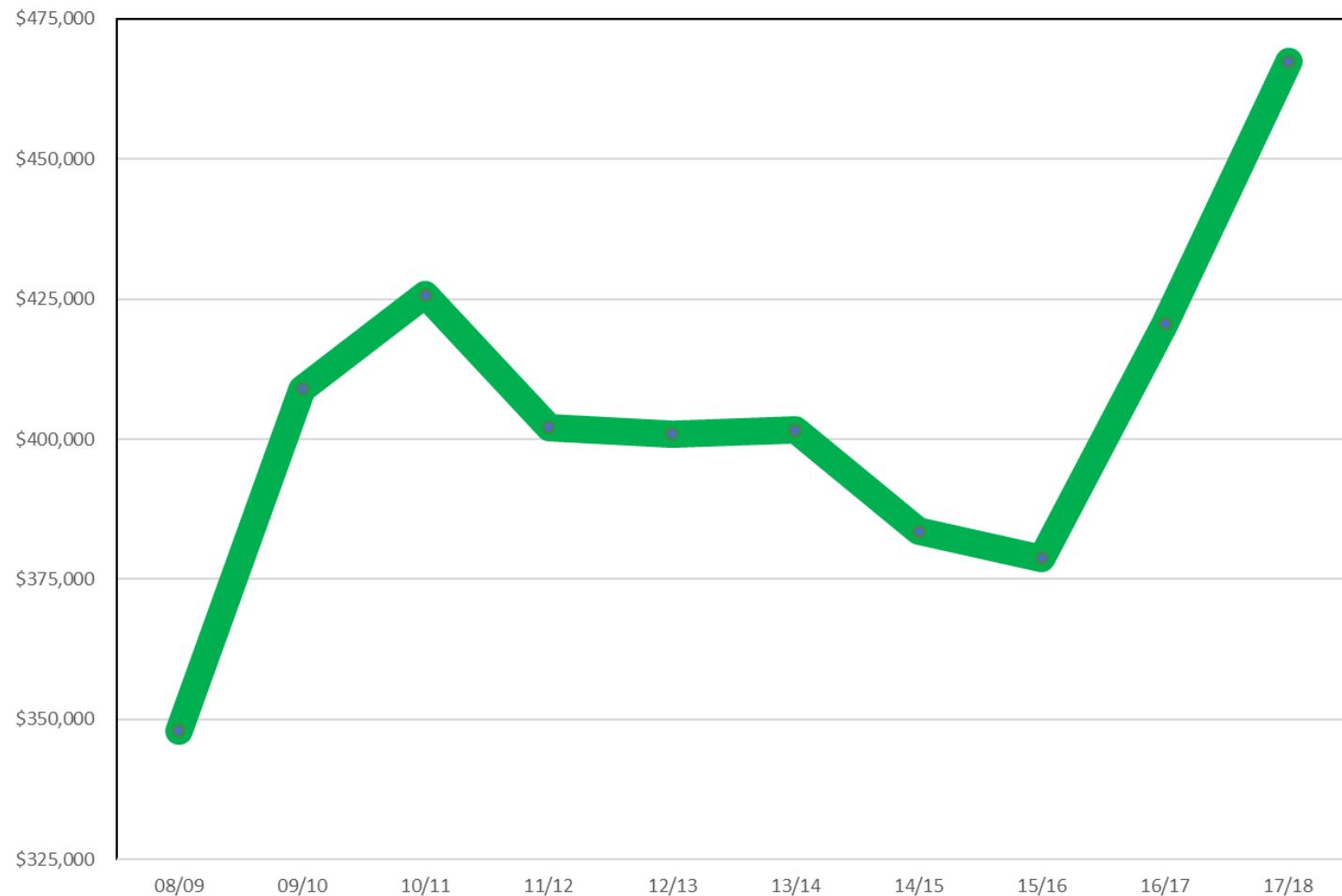


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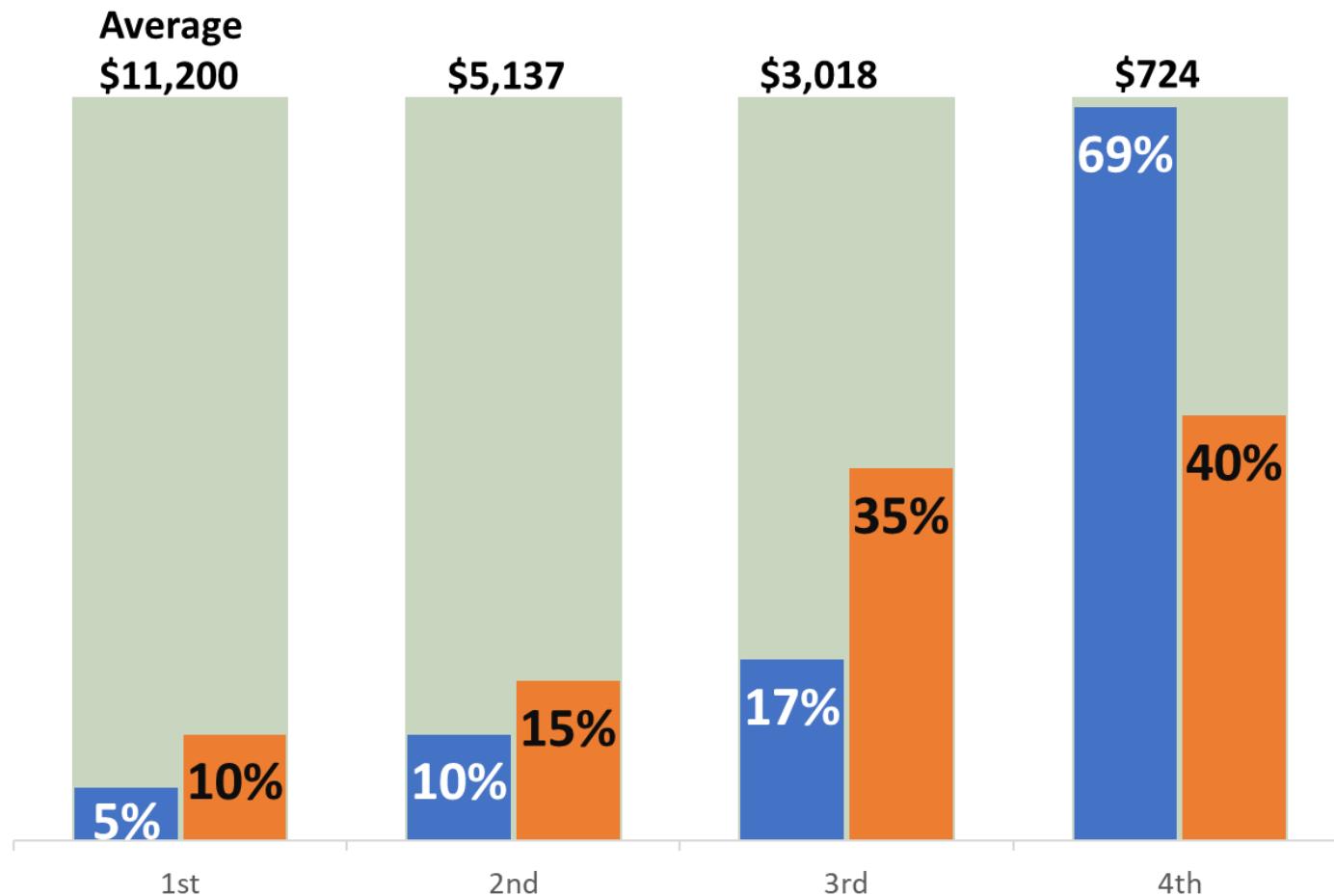
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Pledges: Annual Growth

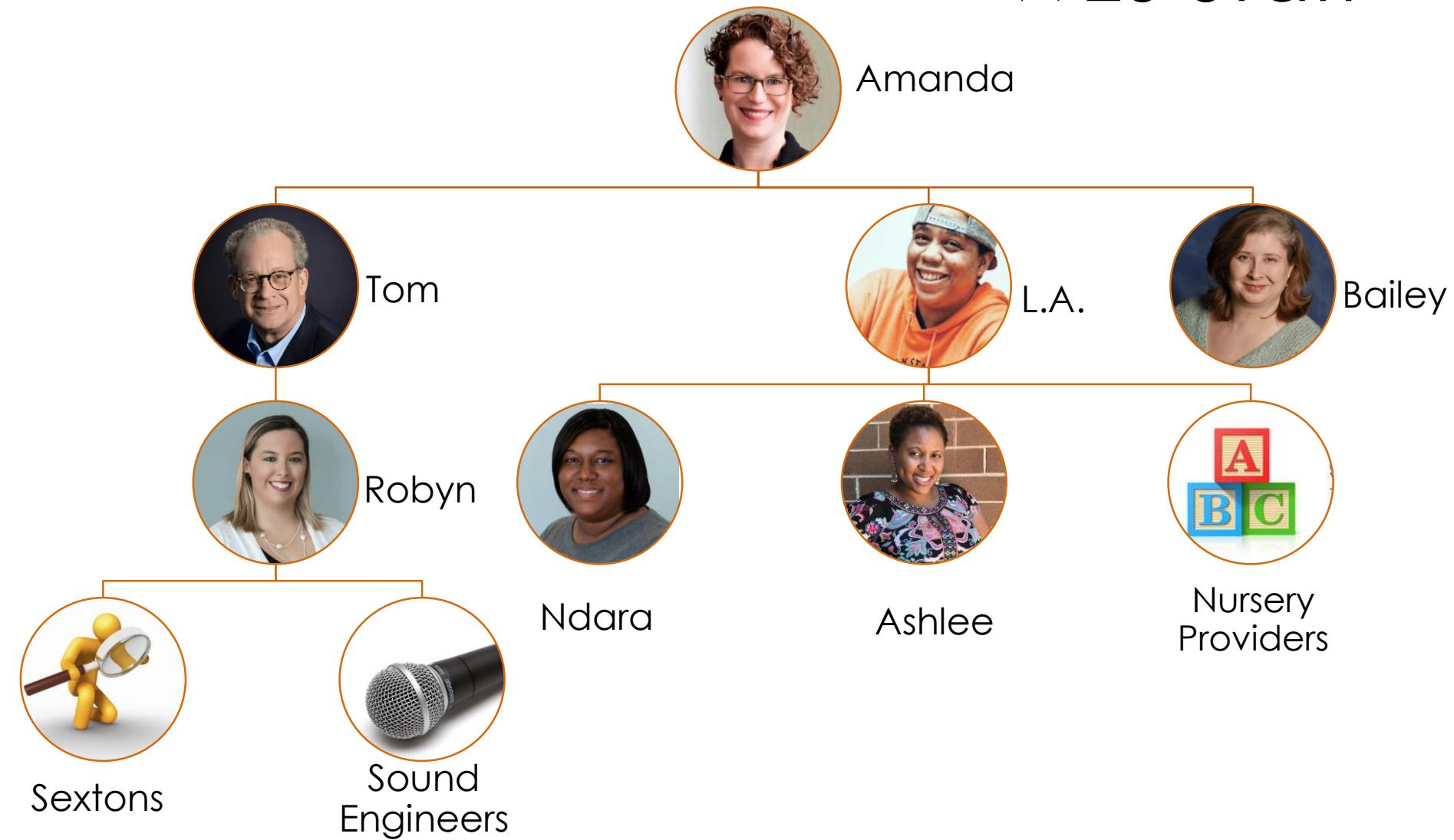
10 Year Pledge History



Distribution of Pledges



WES Staff



WES Organizations



2019-2020 Focus Goals

- **Trang Duong**, Board Member
- **Kate Lang**, Board Member

Instructions

- Small Group Work
- Large Plenary Discussion
- Voting
- Recap

Thank you for sharing your time and talents with us today to move WES towards being a **Sticky Community!**

