This outlines the various methods the First Unitarian Church Board has used both to gather and disperse information.
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Process Name: Internet Survey

Target Audience:
Anyone who looks for it on the First Unitarian Website. You can request a person to be within a target audience of some type (e.g. part of the RE community), but there is currently no way to enforce a filter or limit.

Process Description / Steps:
1. Board requests Comm Comm to capture information that is suitable for a survey.
2. Comm Comm brainstorms questions and cross checks that information received will provide the information being requested.
3. Notify Church Office / Communications that a survey is being planned. Set tentative dates and communication methods.
4. Someone puts the questions into a survey format (check to see if the church has a current subscription for a commercial tool like Survey Monkey or Zoomerang. Google Documents (File -> New -> Form) works well, too).
5. Survey text should include who to contact if they have questions (use generic email: board@firstunitarianportland.org)
6. Have the committee take the survey so that we can check that everything is working and discuss if the results are what we want. Check/Adjust as needed.
7. Finalize the Start and End date.
8. Create some promotional materials that can be used to publicize this. Promotional material should specify purpose/value of survey to the Board, how to find the survey online, start/end dates, how results will be publicized or used.
9. Work with Church Office to adapt promotional material to different formats.
10. If communication includes a skit - plan that out and inform Church office.
11. Launch survey.
12. Periodically check summarized results to see if entries are being made.
13. Continue communications through survey period as reminders.
14. Following end date, change survey to no longer receive entries. Capture final results graphically.
15. Review final results with Board and post to Website.
16. Summarize results to congregation or post in common areas if that was promised.
17. Review this set of instructions and add/change/delete these instructions as needed.

Roles needed:
1. Survey questions creator (assume this is done within the Comm Comm)
2. Survey designer (based on the questions and the tool - select the best format for each question)
3. Internet Poster: Someone who has access to update the First UU website to post this survey on the start date and take it down at the end.
4. Reviewer/Presenter: Someone to capture the results for review at a Board meeting and publication on our website.

Equipment needed:
- Computer with editing capabilities and internet access (and spell checker!)

Ways to advertise this or talk about this:
- E-News,
- Front Steps,
- Weekly Bulletin,
- Skit during church or during coffee hour

What is this forum/process specifically useful for:
- Questions with a limited answer set - not open ended questions.
- Ranking a list, multiple choice selection
- Collecting a baseline of ‘facts’ (generating ideas, going deeper into a subject, etc.)
Process Name: Café Conversations

Target Audience: Congregation-wide

Optimal Size: 40-50

How Selected: Open invitation to congregation with some personally invited members

Process Description:

- Facilitator introduces topic & ground rules for discussion of important questions for a few minutes of silent reflection before starting.
- Guests are seated 4-5 per table with one host at each and encouraged to scribble, doodle, note themes on the paper table cover.
- After 15 minutes guests will move separately to other tables, bringing with them ideas from their first grouping and continue the discussion, generally with a follow-on topic. Host remains at table and welcomes new guests with a brief summary of the first group’s thoughts to encourage linking of ideas.
- For the third 15-minute period guests might either return to first grouping or move on to new table configurations, possibly with a third question relating to the overall topic.
- After 3 15-minute table discussions there will be a whole group discussion of the topic, with a person assigned to record the proceedings on an easel pad. “Questions like ‘what were the most surprising things you heard?’ ‘what did you learn that inspires or encourages you?’” help to bring central themes into focus.
- Compiling and reporting results to be done through looking over table notes as well as those from easel.

Roles needed:
- Facilitator
- Scribe for flip chart
- Table hosts
- Snack organizer

Equipment needed:
- Easel with flip chart & markers & painters tape for posting
- Tables to seat groups of 4-6
- Paper table covers suitable for writing/drawings
- Colored pens & markers for each table
- Refreshments for a group of 40-50
- Bell or singing bowl to mark end of sessions
- Microphone for group discussion – preferably hand-held for use by guests as well as facilitator
- Small vases and flowers for tables
Advertising:
- Sunday Bulletin
- E-news
- Pulpit announcement
- Skits
- Individual invitations

Useful for:
Involving congregation in creative and collaborative discussion of topics of particular interest to the church as a whole

Communication:
- Back to Board
- Other?
Process Name: Blog Questions

**Target Audience:** all church members with access to a computer; random/inclusive selection via notices in e-news, email invite, etc.

**Process Description / Steps:**
1. Determine purpose
2. Determine length of time blog will be available.
3. Formulate open ended questions.
4. Post online.
5. Invite responses.
6. Monitor responses (based on our shared values)
7. Close the window for responses.
8. Summarize and present to Board

**Roles needed:**
- Moderator for the forum (to keep an eye for spamming, etc.),
- Small group to summarize responses afterward to present back to Board (and publish)

**Equipment needed:**
- Possibly a computer in Fuller Hall during social hours to facilitate participation

**Ways to advertise this or talk about this:**
- e-news
- email invite
- pulpit announcement

**What is this forum/process specifically useful for:**
- more open ended questions with threaded conversation responses;
- useful for getting input from a younger demographic;
- people can go as deep as they want

**Additional notes:**
- not anonymous,
- defined period of time,
- everyone can see each other’s response,
- need to have someone monitoring this to pull anything inappropriate based on covenant
Process Name: Panel Q&A

Target Audience: Congregation –wide

How Selected: open invitation to all

Process Description:
● Panel of several people with knowledge of a particular process or issue of interest to congregation, possibly a “hot” topic with passionate points of view attending
● Panel leader introduces topic with summary of current situation and sets ground rules/format for following session
● Audience members present questions, either by raising hands or by submitting questions in writing and are called on by panel leader
● Members of the panel answer questions & take notes

Roles needed:
● Panel leader
● Panelists
● Scribe or note taker

Equipment needed:
● Seating for panel and guests
● be heard by all

Advertising:
● Sunday bulletin
● E-news
● Pulpit
● Skit

Useful for:
● Hot or contentious topics requiring explanation of complex situations
● Taking “temperature” of congregation on a certain topic

Communication:
1 Back to Board
2 Web site possibly
Process Name: Listening Project

Target Audience: Cross-section of individuals within a set of demographic criteria aimed at ensuring diverse voices (e.g. young adults, new members, parents with children in RE, etc.)

Optimal Size: Twelve

How Selected: Randomly selected from within demographic sets (see target audience).

Process Description:
1. Facilitated discussion around a topic selected by the board.
2. Discussion points are created ahead of time and shared with participants prior to the meeting.
3. Board members call to personally invite participants (ensures better participation).
4. Three or four separate meetings to be held.
5. Meetings should be held on different days of the week and weekend, at different times of the day and evening to provide greatest opportunity to participate.
6. Let participants know you will provide beverages and snacks.
7. Schedule for 90 minutes.
8. Use a small meeting room for a more intimate feel.

Roles needed:
1. Facilitator
2. Scribe for flip chart
3. Scribe taking notes on computer
4. Snack provider
5. Board invited to listen

Equipment needed:
- Computer for note taking
- Flip chart on easel with markers
- Snacks and beverages

Advertising:
- Sunday bulletin
- Announce from pulpit
- eNews

Useful for:
- Narrow and deep focus
- Could be “ends” or conceptual focus.
Communication:
- Back to board
- Published on web site
- Summary of each meeting sent to those meetings participants.
- Maintain participant confidentiality