



**The Mountain Retreat and Learning Center, Inc.
Strategic Plan**

2018–2023

Introduction

At the request of the Board of Trustees, a Strategic Planning Committee was formed to prepare a five-year strategic plan for The Mountain Retreat and Learning Center, Inc. The Strategic Planning Committee was chaired by Marty Beech, and included Rob Marcy, Paul Clipp, Reverend Sherman Logan, Reverend Julie Kain, Chris Purcell, Ted Wisniewski, and Laurel Amabile.

The goals and strategies included in the plan are based on input gathered from Mountain members and staff in 2016. Each goal describes a general outcome with criteria to define success and accomplishment of the goal. The strategies describe necessary actions to meet each goal with target dates. The goals and strategies were structured in six areas.

- Youth Programs at The Mountain
- Mountain Programs for Adults and Families
- Conferences, UU Retreats and Personal Retreats at The Mountain
- Management and Operations at The Mountain
- Facilities, Property and Infrastructure
- Member Involvement and Development

The Mountain Retreat and Learning Center, Inc.

The Mountain was founded by a group of Unitarian Universalists in 1979. It has grown from a family and youth camp facility to a full-service retreat and learning center open to all.

Mission: The Mountain enriches lives, fosters an appreciation of the natural world, honors the interconnectedness of all things, and inspires people to build inclusive, meaningful, sustainable communities throughout their lives.

Vision: An exemplary retreat, camp and learning center that celebrates Unitarian Universalist principles, inspires people of all ages, transforms lives, and builds a more compassionate world.

Core Values: Our core values, central to all philosophies and practices of The Mountain Retreat and Learning Center, Inc., are based on the Purposes and Principles of the Unitarian Universalist Association:

- The inherent worth and dignity of every individual
- Justice, equity and compassion in human relations
- Acceptance of one another and encouragement to spiritual growth
- A free and responsible search for truth and meaning
- The right of conscience and the use of the democratic process
- The goal of world community with peace, liberty and justice for all
- Respect for the interdependent web of all existence of which we are a part

Youth Programs at The Mountain

Goal 1. Provide enriching youth programs on The Mountain that engage campers in recreation, adventure, education and creativity.

Success Criteria:

- Increased participation in sessions reaching 100% planned enrollment per event
- Positive evaluations and testimonies from staff and participants
- Cost effective: program revenue meets program expenses

MountainCamp currently offers one-to-two week sessions during the summer for elementary through high school youth, with longer Ascender and Counselor in Training (CIT) leadership programs. Intergenerational Family Camp is a week-long program in the summer with traditional camp activities.

Youth Conferences (CONs) provide weekend experiences in the fall and spring for elementary through high school youth with the support of Peer Advocate Leaders (PALs) and parent advisors.

All programs comply with the Youth Inclusion and Safety Guidelines for Staff of the Unitarian Universalist Association.

Strategies and Proposed Completion Dates

- 1.1 Articulate the purpose of youth programs at The Mountain—MountainCamp and youth conferences (CONs)—with a focus on the MRLC mission (2018).
- 1.2. Align MountainCamp program activities (camp community, crafts, adventure and wilderness skills, sports and games, etc.) with the identified purpose (2018–2019).
- 1.3 Enhance youth leadership programs, including MountainCamp counselors, counselors in training (CITs), Ascenders, and Peer Advocate Leaders (PALs) (2018–2020).
- 1.4 Increase paid participation in youth programs (MountainCamp, Youth CONs, Intergenerational Family Camp) by 10% each year to reach 100% planned enrollment per session (2018–2020).

Goal 1. Provide enriching youth programs on The Mountain that engage campers in recreation, adventure, education and creativity.

- 1.1. Articulate the purpose of youth programs at The Mountain—MountainCamp and youth conferences (CONs)—with a focus on the MRLC mission (2018).**
 - a. Solicit input and feedback from Mountain members, parents and youth program alumni and staff (2018).
 - b. Determine the value, cost and impact of seeking accreditation with the American Camp Association (ACA) (2018).
 - c. Work with an advisory group to develop a written statement of the purpose(s) of youth programs at The Mountain (2018).

- 1.2. Align MountainCamp program activities (camp community, crafts, adventure and wilderness skills, sports and games, etc.) with the identified purpose (2018–2019).**
 - a. Solicit feedback from staff, campers, and parents at the end of each session (surveys, interviews, focus groups) to evaluate program elements (begin 2018).
 - b. Recruit former counselors, campers, or SUUSI workshop leaders to assist with youth programs (e.g., kayaking, yoga, self-reflection, photography, writing, arts, etc.) (2019).
 - c. Design and implement innovative and exemplary elements and programs, such as adventure and leadership or MountainCamp for adults (2019).
 - d. Determine cost effectiveness of each type of youth program to make needed adjustments in budgeting. Registration and program fees must cover programming, staff, and overhead costs.

- 1.3. Enhance youth leadership programs, including MountainCamp counselors, counselors in training (CITs), Ascenders, and Peer Advocate Leaders (PALs) (2018–2020).**
 - a. Solicit feedback from staff and participants at the end of each session (e.g., surveys, interviews, focus groups) to evaluate training, activities and procedures, such as registration, administration, and safety practices (beginning 2018).
 - b. Develop clear descriptions of the responsibilities, expectations and leadership skills for counselors, CITs, Ascenders, and PALs (2019).
 - c. Update procedures for orientation and training, coaching and evaluation with a focus on the MountainCamp/CON experience, child development and participants with special needs, etc. (2019).
 - d. Determine need and provide funding and support for systematic training for staff (2020).
 - e. Provide a tangible form of recognition for participants in youth leadership programs upon successful completion (2020).

- f. Determine cost effectiveness of each youth leadership program to make needed adjustments in budgeting. Registration and program fees must cover programming, staff and overhead costs.

1.4 Increase paid participation in youth programs (MountainCamp, Youth CONs, Intergenerational Family Camp) to reach 100% planned enrollment per session (2018–2020).

- a. Evaluate patterns/trends in enrollment and camper and parent satisfaction in traditional Mountain programs for youth for the past five years (2018).
- b. Increase marketing to members and potential campers, including using the Mountain Mover program for personal contact and outreach to UU congregations and other like-minded groups (2020).
- c. Determine cost effectiveness of each Mountain program for youth to make needed adjustments in budgeting. Registration and program fees must cover programming, staff, and overhead costs.

Mountain Programs for Adults and Families

Goal 2. Offer traditional and new programs on The Mountain for adults and families seeking enrichment, appreciation of the natural world and interconnectedness within an inclusive, meaningful community.

Success Criteria:

- Increased participation in programs to reach 100% planned enrollment per event
- Positive evaluations and testimonies from participants
- Cost effective: program revenue meets program expenses

Mountain programs for adults and families have included traditional events, such Homecoming and Members' Annual Meeting in the spring and Thanksgiving since opening in 1979. Recently new recurring programs, like SUUFI, Appalachian Spring, and Music Week have been successfully launched. One time topical programs have also been developed by Mountain staff and volunteer program leaders.

Strategies

- 2.1. Grow participation in traditional Mountain programs (Homecoming and Thanksgiving) to reach 100% planned enrollment per event (2018–2019).
- 2.2. Offer four recurring Mountain programs each year with 100% planned enrollment per event (2018–2020).
- 2.3. Offer new Mountain programs to respond to current interests and needs (2020–2022).
- 2.4. Enhance adventure programming elements on The Mountain (2018–2020).
- 2.5. Improve the use of ropes and challenge courses on The Mountain (2019–2022).

Goal 2. Provide programs on The Mountain for adults and families seeking enrichment, appreciation of the natural world, as well as interconnectedness within an inclusive, meaningful community.

2.1. Grow participation in traditional Mountain programs (Homecoming and Thanksgiving) to reach 100% planned enrollment (2018–2019).

- a. Evaluate patterns/trends in participation and guest satisfaction in traditional Mountain programs in the previous five years (2018).
- b. Offer innovative activities and options to attract more participants (2018–2019).
- c. Increase marketing to members and potential participants using the Mountain Mover program for personal contact and outreach to UU congregations and other like-minded groups (2018).
- d. Determine cost effectiveness of each traditional Mountain program to make needed adjustments in budgeting. Registration and program fees must cover direct costs.

2.2. Offer four recurring Mountain programs (e.g., SUUFI, Music Week, Appalachian Spring) each year with 100% planned enrollment (2018–2022).

- a. Evaluate patterns/trends in participation and guest satisfaction in existing recurring Mountain programs (2018).
- b. Offer innovative activities and options for existing programs to attract more participants (beginning 2018).
- c. Increase marketing to potential participants and other like-minded groups (2018).
- d. Reconnect with Roads Scholar or other networks that market programs to expand participation in Mountain programs. Initially advertise existing programs, such as SUUFI, Appalachian Spring, or Music Week through at least one of these networks (2019).
- e. Add one new recurring Mountain program. Consider a new program on environmental sustainability for adults and youth. (2022).
- f. Determine cost effectiveness of each recurring Mountain program to make needed adjustments in budgeting. Registration and program fees must cover programming, staff, and overhead costs.

2.3. Offer new innovative and exemplary Mountain programs (2019–2022).

- a. Consider new programs and audiences, such as home-schooling, nature study and environmental literacy; social justice issues; UU Principles, history, and current events; and creativity, arts and music (2019).
- b. Determine which programs are in demand, potential customers, and how to be competitive (2019).
- c. Create descriptions of new programs with intended outcomes; target audience; marketing plans, schedule; activities and workshops; providers; supplies, equipment and facilities; costs and fees; and evaluation strategy (2020–2022).

- d. Seek grant funding and local partners to defray costs for resources and staffing (2020–2022).
- e. Offer new programs should on a trial basis, with success measured by attendance, and satisfaction, and cost effectiveness. Registration, program fees, and subsidies (if obtained) must cover programming, staff and overhead costs.

2.4. Enhance adventure programming elements on The Mountain (2018–2020).

- a. Evaluate existing adventure programming elements for youth and adults to identify current needs, including staff qualifications and training, equipment and facilities (2018).
- b. Create descriptions of adventure programming elements with desired outcomes, activities, and evaluation strategies for specific groups of participants (e.g., different ages, abilities, and purposes) (2019).
- c. Implement at least two new adventure elements, such as trail blazing and maintenance, water sports, wilderness skills, hiking and backpacking, or rock climbing and rappelling (2020).
- d. Offer adventure programming within Mountain programs for youth and adults, and make it available for retreats, conferences, and external groups (special program fee) (2020).
- e. Registration, program fees, and subsidies (if obtained) must cover programming, staff and overhead costs.

2.5. Improve the use of ropes and challenge courses on The Mountain (2019–2022).

- a. Evaluate existing low and high ropes challenge equipment and qualifications of staff to identify needs for training and inspection, maintenance and repair of equipment (2019).
- b. Make the ropes and challenges courses available for retreats, conferences, and external groups (special program fee) (2020). Registration or program fees must cover direct costs.
- c. Implement low and high ropes challenge course options that have a description of specific objectives and outcomes, detailed description of activities, target participants (youth and adults), safety rules and precautions, and evaluation strategy (2020).
- d. Replace existing equipment within five to seven years (2022).

Conferences, UU Retreats and Personal Retreats at The Mountain

Goal 3. Increase the use of The Mountain by UUs and like-minded groups for conferences, UU retreats, and personal retreats.

Success Criteria:

- Increased number of paid guests and groups in conferences and retreats to reach 90% available capacity
- Increased numbers of paid guests for personal retreats, based on available space
- Positive evaluations and testimonies from participants
- Cost effective: program revenue meets expenses

The Mountain Retreat & Learning Center, Inc. depends on revenue from external groups and individuals to sustain operations. It hosts a variety of retreats for UU organizations and congregational, such as SEUMMA, LREDA, and UU Womenspirit, and conferences for community groups like Gay Spirit Visions.

The Mountain can house 80–100 adult guests each night. This represents a potential of 27,000 person-nights annually, based on operating ~10 months a year with 30 days per month and an average of 90 enrollments per day. Recent history reveals an annual paid occupancy rate at 36–38% capacity. The table below compares person-night occupancy data by program types for 2014–2016.

Adult and Youth Person Nights

| | Youth Programs | Conferences | UU Retreats | Mountain Programs | Personal Retreats | Complimentary | Total |
|------|----------------|-------------|-------------|-------------------|-------------------|---------------|-------|
| 2014 | 3919 | 2590 | 2038 | 949 | 156 | 567 | 10219 |
| | 38% | 25% | 20% | 9% | 1.5% | 6% | |
| 2015 | 3816 | 3154 | 1981 | 1147 | 90 | 744 | 10932 |
| | 35% | 29% | 18% | 10% | 0.8% | 7% | |
| 2016 | 4009 | 2899 | 1780 | 1032 | 161 | 984 | 10865 |
| | 37% | 27% | 16% | 9% | 1.5% | 9% | |

Strategies

- 3.1. Implement comprehensive communication and marketing plans to disseminate information about The Mountain (beginning 2018).
- 3.2. Improve services to attract groups and personal retreats (2019–2020).
- 3.3. Increase use of The Mountain by groups and individuals to reach 90% utilization of available capacity (2018–2023).

Goal 3. Increase the use of The Mountain for UUs and like-minded groups for conferences, UU retreats, and personal retreats.

3.1. Implement marketing plans to disseminate information about the availability of The Mountain for UU retreats, conferences, and personal retreats (beginning 2018).

- a. Advertise availability for retreats in UU World, UUA website, and websites of like-minded groups. Revise the note in UUA affiliate website that personal retreats are possible on The Mountain (2018).
- b. Increase direct marketing and communication with like-minded groups, such as churches, social justice organizations, corporate business and leadership retreats; organizations for artists, crafts, photographers, writers, musicians, nature study; youth groups, K-12 school and university groups, and Highlands community groups (2019).

3.2. Improve services to attract conference groups and retreats (2019–2020).

- a. Provide services to make it easier for guests get to the Mountain, such as airport shuttles from Atlanta or Asheville and local shuttles from the base of The Mountain (2019).
- b. Provide program elements for conferences and retreat groups by contracting with staff for special program fees, such as performers and workshop leaders (2020).

3.3. Increase use of The Mountain by groups and individuals to annually reach 90% use of available capacity (2018–2023).

- a. Identify current patterns and analyze the impact of factors related to use of The Mountain for groups and individuals (personal retreats), including bookings, contracts and cancellation practices (2018).
- b. Increase use of The Mountain for UU retreats by congregations, regional or national groups (leadership school; LREDA, SEUMMA, Musicians Network, etc.) through regular communications with UU groups at the national, regional, and congregational level (2019).
- c. Develop collaborative programs with a mission-driven focus with businesses in the local area (e.g., Appalachian culture, outdoor adventure, winter sports, Western North Carolina attractions; Highlands Chamber of Commerce, Highlands Nature Center, Bascom) (2020).

Management and Operations at The Mountain

Goal 4. Ensure the stability of the organization through optimizing operations and sound financial management.

Success Criteria:

- Balanced annual budget covers all operating expenses
- Successful fundraising for targeted programs and camperships
- Compliance with federal, state, and local laws and regulations,
- Staff performance, satisfaction, and retention
- Guest satisfaction with services

The fulfillment of the mission and vision of The Mountain requires a skilled and committed staff and a network of volunteers to perform the necessary functions for year round operations, to improve and maintain all facilities and infrastructure, and to be stewards of the Mountain environment and natural resources, in partnership with the Highlands-Cashiers Land Trust. The current budget is made of 75% program revenue and 25% development funds. We are proud of these recent accomplishments:

- Hiring a new executive director and maintaining a qualified, dedicated staff
- Implementing an internship program for the Many Hands Peace Farm
- Achieving a balanced budget in 2014, 2015, and 2016

The Mountain currently disseminates information about its facilities, programs, and organization through the MRLC website (updated in 2015), a quarterly newsletter, and Facebook page. Copies of annual reports, newsletters, flyers, and videos are readily available on the website.

Strategies

- 4.1 Ensure stability of the organization through sound financial management (2018–2023).
- 4.2 Recruit, hire, and adequately compensate skilled, qualified and committed staff to perform the functions necessary for operation of The Mountain (2019–2020).
- 4.3 Implement a comprehensive communication plan to disseminate information about The Mountain (2018–2020).
- 4.4 Implement a coordinated and integrated environmental sustainability program for The Mountain (2018–2021).
- 4.5 Improve the productivity and impact of the Many Hands Peace Farm (2019–2022).

Goal 4. Ensure the stability of the organization through optimizing operations and sound financial management.

4.1. Ensure stability of the organization through sound financial management (2018–2023).

- a. Establish policies and procedures with schedules for planning, quarterly forecasting and optimizing the annual budget to result in a balanced budget (2018).
- b. Increase program revenue 3% per year by maximizing use of The Mountain by 1) analyzing pricing practices and options for each type of program (rates, group size, services, seasons) to maximize profit margins; 2) evaluating contract and cancellation policies and practices; and 3) leveraging strengthened marketing strategies to optimize Mountain revenues (2019).
- c. Identify and pursue alternative revenue streams and resources (e.g., grants, partnerships, gifts, etc.) to support operating and infrastructure costs, including seeking dedicated funding for camperships for Mountain programs and MountainCamp and CONs, donations and in-kind contributions from members and organizations, and other revenue streams that align with our Mission (2019).
- d. Create and test a sustainable capital improvement plan to support infrastructure needs not funded through the annual budget (2019). Conduct a capital campaign in 2020–2023.
- e. Operate with a balanced annual budget that covers operating expenses (Program Revenue—80% and Development —20%) (2022).

4.2. Recruit, hire, and adequately compensate skilled, qualified and committed staff to perform functions necessary for operation of The Mountain (2019–2020).

- a. Develop a comprehensive staffing plan with job descriptions, compensation, benefits, and housing costs for year round and seasonal staff and projected needs for additional staff and services (2019).
- b. Increase the use of on-site and off-site volunteers for operational tasks and special projects by 1) maintaining a database of volunteers detailing specific skills, talents and areas of interest; and 2) providing orientation, training, and coaching for volunteers (2019).
- c. Establish internship programs with colleges and universities to recruit and train personnel for specific tasks/programs on The Mountain and determine costs of room/board and stipends (2020).

4.3. Implement a comprehensive communication plan to disseminate information about The Mountain (2018–2020).

- a. Improve the use of social media (e.g., Facebook and Twitter) by articulating the purpose and desired uses of social media for The Mountain and managing social media posting (content and video or still images, frequency, person(s) responsible) and documenting usage (2018).
- b. Coordinate content with communications by 1) “automating” mechanisms for updating content on web, images and videos, communication materials, press releases on a regular basis; and 2) developing a brief orientation program that highlights our Mission/Vision. Customize for different groups, as needed (e.g., UU retreats, conferences, etc.) and encourage membership and donations (2019).
- c. Improve website and social media presence for communication by 1) analyzing website statistics to evaluate usage and improve engagement (2018, then annually); 2) increasing and tracking links on the web beyond MRLC webpage (e.g., UU Association of Camps and Conferences Centers [UUACC], other camp and conference centers); and 3) implementing Search Engine Optimization (SEO) on the website to improve the visibility of the website on free search engine results pages (est. cost \$350 per month and up) (2018–2020).

4.4. Implement a coordinated and integrated environmental sustainability program for The Mountain (2018–2021).

- a. Evaluate and implement needed improvements in reduce, reuse, recycle and composting practices and procedures across The Mountain (2018).
- b. Identify deficiencies in lighting, heating, and insulation through an energy audit conducted by a local utility in all facilities (2018) and make needed improvements (e.g., smart technology, such as thermostats) (2020).
- c. Add alternate energy sources (e.g., wind or solar) for hot water in Lodge, mini Lodge, and kitchen, where economically feasible (2021).

4.5. Improve the productivity and impact of the Many Hands Peace Farm (2019–2022).

- a. Work with an advisory group to develop a three-year strategic plan for the operation and use of the Many Hands Peace Farm that contributes to The Mountain and addresses the relationship with food service and kitchen management (2019).
- b. Implement the strategic plan (2020) and evaluate outcomes (annually).
- c. Repurpose the Farm as needed to meet the goals of The Mountain (2022).

Facilities, Property and Infrastructure

Goal 5. Ensure the stability of the organization by maintaining and improving the property, facilities and infrastructure.

Success Criteria:

- Balanced annual budget covers necessary maintenance and repairs
- Successful fundraising for targeted capital improvements
- Compliance with federal, state, and local laws, and requirements of land trust
- Guest satisfaction with facilities and infrastructure

The fulfillment of the mission and vision of The Mountain requires a skilled and committed staff and volunteers to maintain all facilities and infrastructure, and to be stewards of the Mountain environment and natural resources, in partnership with the Highlands-Cashiers Land Trust. We are proud of these recent accomplishments.

- Development efforts resulting in targeted donations for facilities
- Repaving the road from the base
- Replacing the roof of the Lodge, Sally's deck and the windows in the Great Room and refurbishing the library
- Replacing the furnace in the dining hall
- Renovating AJ's Garage
- Remodeling Milestone and White Oak

Strategies

- 5.1. Ensure preventative maintenance, repair, and replacement of facilities, equipment, and furniture (2018–2020).
- 5.2. Improve technology and communications connectivity and equipment (2018–2020).
- 5.3. Improve the efficiency of the water and sewer system (2018–2019).
- 5.4. Improve roads and grounds on The Mountain property (2018–2020).
- 5.5. Improve kitchen, dining hall, and Commons meeting space (2018–2020).
- 5.6. Improve offices and program areas, including the Craft Barn and Stables (2020–2021).
- 5.7. Improve the quality and increase the availability of staff and volunteer housing (trailers, director's house, Planetarium, Ascender, and Riley) (2018–2021).
- 5.8. Improve meeting rooms and program spaces in the Lodge, Tree House, and White Oak (2018–2022).
- 5.9. Ensure accessibility (ADA standards) for all facilities and program areas on The Mountain (2020).
- 5.10. Improve the quality and increase the number of sleeping rooms available on The Mountain property (2023).

Goal 5. Ensure the stability of the organization by maintaining and improving the property, facilities and infrastructure.

5.1 Ensure preventative maintenance, repair, and replacement of facilities, equipment and furniture (2018–2020).

- a. Implement a plan to prioritize and accomplish ongoing preventive repair and replacement of facilities, equipment, and furniture with adequate funding for the schedule of work to ensure that facilities and equipment meet all state and local regulations, including
 1. Inventory and inspection of all facilities, equipment, and furnishings to identify and prioritize needs (2018)
 2. Needed repair or replacement of furniture and equipment (e.g., indoor and outdoor furniture, video projectors, sound systems, outdoor equipment) (beginning 2018)
 3. Needed repair of facilities (beginning 2018)
 4. Replacement (purchase or through donations) of vehicles to support programs and maintenance (pick up truck—\$40,000 (2019); 2 vans—\$40,000 each (2020))

5.2. Improve technology and communications connectivity and equipment (2018–2020).

- a. Review current equipment and technology to articulate a plan for updating equipment, connectivity, and software that includes 1) high speed internet access for all spaces (e.g., meeting spaces, dining hall, sleeping rooms, program areas, including those at the base); 2) upgraded computer systems (hardware, data storage, and software use for Mountain business operations, registration, and donations); and 3) communications (phone systems) used by staff and guests (2018).
- b. Investigate possible use of microcell/network extenders from AT&T, Verizon, T-Mobile or services such as teamviewer.com to provide guests and staff with phone service (2019).
- c. Implement plan to update equipment, software, and connectivity (2020).

5.3. Improve the efficiency of the water and sewer system (2018–2019).

- a. Automate the operation of the wells by 1) finishing fiber optic cable hook up; 2) setting up server in craft barn area; and 3) setting up computer in well house (\$3000) (2018).
- b. Evaluate long term (3–5 years) needs for the water and sewer system (2018).
- c. Complete sewer plant equipment room repair (2019).

5.4. Improve roads and grounds on The Mountain property (2018–2020).

- a. Implement a plan regarding appearance of grounds, including expectations for equipment, parking, trash, smoking areas, etc. The plan should also address: 1) consistency of signage (\$2500) (2018); 2) spaces that provide the first

- impression for guests (kitchen and recycle area, craft barn) (2019); and 3) exteriors and doors on facilities (2019).
- b. Maintain or improve roads on The Mountain property by 1) maintaining Little Scaly Mountain Road from base to top; and repaving Ring Road including drainage, leveling, and repair of base. Temporary repairs may be needed to ensure safety until funds are available for repaving (\$30,000) (2019).
 - c. Improve the lakes and dam at the base of The Mountain property by 1) stabilizing the lakes and dam to meet local code requirements (\$100,000 to \$300,000) (2018); 2) implementing a schedule and funding maintenance for lakes and piers, beaches, trails, and boat storage (2019); and refurbishing surrounding areas used for swimming, boating, and hiking (2020).
 - d. Implement a responsible management plan for the environment to protect unique plants and trees (e.g., white oak trees, hemlocks, chestnuts, meadow) on The Mountain property and improve interpretive signage (2019).
 - e. Enhance Memorial Gardens using an advisory committee to guide decisions on landscaping and where / if names will be in the garden. Upgrades will include a landscaped trail that is wheelchair accessible; upper level seating, a stone floor to both seating areas (est. cost \$30,000) (2019–2020).

5.5. Improve kitchen, dining hall, and Commons meeting space. (2018–2020).

- a. Repair roof leaks and ceiling tiles, add sound baffles in dining hall and replace electrical system in kitchen and dining hall (2018–2019).
- b. Replace outdated kitchen equipment (e.g., stove, dishwasher (\$6000), propane heater (\$1,000).) (2019–2020).
- c. Refinish walls and cabinets in the dining hall and Commons (\$10,000) (2019).

5.6. Improve offices and program areas, including the Craft Barn and Stables (2020–2021).

- a. Renovate the Craft Barn by adding 6-7 rooms (12 sleeping spaces) usable year-round; winterizing and adding heating and plumbing. (\$10,000); and using reclaimed lumber to add a deck (2020).
- b. Make needed repairs and renovations to all office areas (2020).
- c. Remodel Stables by 1) adding water and electricity; 2) separating classroom space and workrooms; 3) adding showers and sinks; 4) adding insulation and heat for year-round use and 5) repairing roof (\$50,000) (2021).

5.7. Improve the quality and increase the availability of staff and volunteer housing (trailers, director's house, Planetarium, Ascender, and Riley) (1918–2021).

- a. Complete needed maintenance and renovations for staff housing (\$5000 to \$10,000 each trailer) and the director's house (roof leaks, electrical issues and unfinished rooms, inside and outside painting) roof and rotting wood around windows (\$20,000) (2018–2019).

- b. Replace the Planetarium and Kinsman with an 8 unit building (each unit has 2 bedrooms and a bathroom; 32 beds) (\$75,000) (2020).
- c. Repair or rebuild Ascender building for staff: sleeping rooms, common area, and bathroom(s) (2021).

5.8. Improve meeting rooms and program spaces in the Lodge, Tree House, and White Oak (2018–2022).

- a. Upgrade meeting and common spaces in Lodge by repainting walls, refinishing woodwork, and replacing carpet in library (2018); and replacing worn furniture in lobby, Great Room, and library (2019); and replacing heating unit (2020).
- b. Upgrade meeting spaces in Tree House, by 1) remodeling lower level recreation room to allow for flexible use as meeting space (e.g., portable dividers, refinish floor, walls, and fireplace; replace furniture and equipment, and repairing the wall by the lightroom); 2) renovating the stage; 3) adding a water source on top floor for housekeeping; and 4) turning attic into meeting space, classroom, or nature center (2019–2022).
- c. Renovate White Oak by 1) removing wall between room and “farm office” to increase the size of the main meeting room; 2) adding carpet; and 3) adding a bathroom (2019).

5.9 Ensure accessibility (ADA standards) for all facilities and program areas on The Mountain (2020).

- a. Add automatic door openers in the main doors for the office, Commons and dining hall, Lodge, and Tree House.
- b. Add hand railings on all boardwalks.
- c. Provide smooth surfaces for paths leading to outdoor areas, such as fire pits, amphitheater and Mediation Rock.
- d. Ensure accessible public bathrooms in all public areas.

5.10. Improve the quality and increase the number of sleeping rooms available on The Mountain property (2018–2023).

- a. Improve existing sleeping rooms in the Lodge, Milestone, and Emerson by determining current issues and making needed repairs, upgrades or replacement of furniture and equipment (e.g., mattresses, flooring, furniture) (2018–2019).
- b. Make improvements to Cabins 1–20, including replacing mattresses and worn furniture, cleaning or refinishing walls and floors, replacing light fixtures. Renovate bathrooms (e.g., replace shower stalls, toilets, and outdated plumbing (2018–2019).
- c. Complete deck and walkway repairs for all cabins (2019).
- d. Add air conditioning or moisture barriers in all facilities as needed (2022).
- e. Construct a new self-contained structure attached to the Lodge (aka mini-Lodge) to accommodate 18 guests with nine sleeping rooms, meeting space, kitchen and dining, and bathrooms) (\$300,000; \$25,000 already funded) (2023).

Member Involvement and Development

Goal 6. Increase involvement of Mountain membership and development (donations).

Success Criteria:

- Number of annual memberships (300 members in 2018 then 3% increase per year)
- Participation in Mountain governance (engagement on Mountain Board of Trustees and ad hoc committees; 3% increase in voting members per year)
- General donations (5% increase per year)
- Donations designated for special projects and capital improvement
- Donations designated for endowment fund (3% increase per year)

The Mountain is a membership organization. From the beginning, a group of committed Unitarian Universalists envisioned a place where people could gather and create the kind of community that makes a positive difference in people's lives. This vision and mission continues today.

Each year members elect a Board of Trustees to oversee the operations and programs on The Mountain. Specific duties and membership composition are outlined in Section Six of the By Laws. Members continue to enjoy the programs and contribute generously in terms of money, time, and talent. Donations are solicited to support the annual operations budget and capital improvement, and the Endowment Fund.

Strategies

- 6.1 Update policies and practices regarding annual membership, institutional membership, and life membership (2018–2019).
- 6.2 Increase the knowledge, engagement, and effectiveness of the Mountain Board of Trustees (2018–2019).
- 6.3 Promote major giving programs including the annual campaign, capital improvement, the Endowment Fund and planned giving (beginning 2018).

Goal 6. Increase involvement of Mountain membership and development (donations).

6.1 Update policies and practices regarding annual membership, institutional membership, and life membership (2018–2019).

- a. Clarify policies and practices regarding Mountain membership: 1) definition of annual, life and institutional membership; 2) member rights and responsibilities (voting, participation, donations); and annual member renewals (begun in 2017–2019).
- b. Increase awareness and recruitment efforts for membership through communications (website, social media, newsletter, congregational updates, etc.) and program presentations (2018–2019).

6.2. Increase the knowledge, engagement, and effectiveness of the Mountain Board of Trustees (2018–2019).

- a. Engage in a process of visioning around governance for The Mountain by 1) crafting a covenant for the board; 2) developing a mission and vision for the board; and 3) determining which leadership capacities are critical for The Mountain's next four to seven years.
- b. Provide regular training for trustees, committee members, and team chairs, including 1) orientation to role and responsibilities; 2) history and background of The Mountain; 3) working with staff; and 4) participating in Mountain programs outside of board meetings (2018).
- c. Embrace a governance structure that invites broader membership and participation, including 1) standing and ad hoc advisory committees of trustees and Mountain members to support the work of the Board and staff; 2) youth representation on the Board; 3) multicultural and racial diversity on the Board; and 4) engagement of individuals supporting The Mountain through Mountain Movers (2018).
- d. Encourage and support continued engagement with former trustees through participation in committees, outreach, advisory groups, partnership with other UU groups, and roles such as program leaders, Mountain Stewards and volunteers (2019).
- e. Institutionalize the Trustee Nominating Committee by documenting and updating current practices and amending the Bylaws and Board policy handbook (2019).

6.3 Promote major giving programs including the annual campaign, capital improvement, the Endowment Fund and planned giving (beginning 2018).

- a. Collaborate with the Director of Development and Institutional Development Team of the Board of Trustees to prepare and implement an annual development plan and work toward a capital campaign (2018).
- b. Increase communication with donors about annual funding to strengthen the relationships on a personal level on behalf of the organization. Identify volunteer

- experts on development who have a relationship with The Mountain and potential sources of funding and promotion of the Mountain (2018).
- c. Increase number of donors by encouraging interested individuals and groups (nonmembers) to give to The Mountain (e.g., through Congregational Mountain Movers; website, social media, and newsletters; etc.) (2018).
 - d. Establish targeted fundraising drives to pay for needed capital improvements by 1) combining targeted fundraising for selected projects with annual budget process; 2) coordinating the long term capital campaign with immediate needs and designated donations; and 3) conducting donor planning and feasibility study (2018–2020).
 - e. Collaborate with the Endowment Board to identify potential sources of endowment funding, planned giving, and memorial gifts. Refer to the Wake Now Our Vision UUA legacy challenge—re: planned giving (beginning 2018).