

MONTEAGLE SUNDAY SCHOOL ASSEMBLY



2013-2017 STRATEGIC PLAN



ANN COULTER 516 GRAHAM STREET CHATTANOOGA TN 37405

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EXECUTIVE SUMMARY

Under the direction of the Long Range Planning Committee of the MSSA and with guidance from the Strategic Planning Task Force named by the Committee, the strategic planning process began in early 2013. Ann Coulter of A. Coulter Consulting was hired to assist with the strategic planning process.

One major goal of the process was to provide multiple and varied opportunities for members and other important stakeholders to provide input and to review progress throughout the planning process. This began with a detailed survey instrument sent to all Assembly members, renters and friends and family. During the summer season there were two half day planning sessions for the Task Force and two public forums at the Assembly for additional input. The basic strategic plan was adopted by the Board in December, 2013 and committees and working groups began to create a more detailed Implementation Plan. All plan components are contained in this report.

The purpose of the Monteagle Sunday School assembly is *"...the advancement of science, literary attainment, Sunday School interests, and the promotion of the broadest popular culture in the interest of Christianity without regard to sect or denomination...and to hold stated public meetings from year to year upon the grounds of the Assembly."*

The Mission of the Monteagle Sunday School Assembly is to be a welcoming community of Christian faith where people gather to engage in spiritual growth and renewal, lifelong inquiry and learning, recreational and cultural enrichment, while being good stewards of our natural resources and our Assembly heritage.

We do this through:

- An active and varied program of events and activities for members, guests, and the community at large
- An emphasis on developing values, character, and leadership among our children and young people
- Promoting and fostering an intergenerational and family friendly environment
- A membership engaged in governing the Assembly and guiding its future
- Taking excellent care of the Assembly grounds, buildings, and facilities
- Sound financial management to ensure the sustainability of the Assembly

Values - We believe:

- A safe, caring, and friendly environment promotes spiritual, moral and intellectual growth for people of all ages
- In the value of the Assembly's Chautauqua heritage and in our community traditions
- Our interdenominational Christian beliefs are the bedrock of our community
- In the centrality of our responsibilities to the children and young people in our midst
- Education is key to a happy life, recreation sustains our bodies, and cultural enrichment is central to creating a civil society
- In being good stewards of the natural and built community around us, and in being good neighbors to those beyond our gates

During the 2013 Strategic Planning Process, six broad comprehensive goals were established by the Task Force for the five year period, along with strategies to achieve them. These goals are action oriented, quantifiable, and designed to best accomplish the overall MSSA mission.

Goal 1. Enhance Overall Assembly Quality of Life

- Strategy A. Create a More Welcoming Atmosphere
- Strategy B. Improve Communications among Members, Friends, and Visitors
- Strategy C. Enhance Community Outreach and Community Service Programs
- Strategy D. Be More Environmentally Friendly
- Strategy E. Enhance Our Diversity

Goal 2. Increase Participation Among all Groups in Programs, Events, and Activities

- Strategy A. Increase Platform Appeal to all Participant Groups
- Strategy B. Increase Marketing and Outreach to Potential Visitors

Goal 3. Periodically Evaluate the Governing Structure and Practices of the MSSA

- Strategy A. Periodically Perform a Legal/Tax Status Study
- Strategy B. Periodically Review Board Structure and Governing Policies

Goal 4. Increase the Financial/Fiscal Sustainability of MSSA, Define Measureable Benchmarks

- Strategy A. Facilitate Leasehold Transfers
- Strategy B. Grow the Endowment
- Strategy C. Promote Membership Growth
- Strategy D. Increase Non-member Revenues

Goal 5. Determine the Ideal Physical Plant and Footprint to Enhance and Expand Assembly Grounds

- Strategy A. Evaluate Potential Expansion of Assembly Footprint to protect and enhance the Mission
- Strategy B. Evaluate Feasibility and Need for Year Round Facilities
- Strategy C. Define Facilities Maintenance/Replacement Plan

Goal 6. Increase/Enhance Overall Marketing and Promotional Efforts

- Strategy A. Target Potential Members and Renters
- Strategy B. Market to Increase Gate Revenues

STRATEGIC PLANNING PROCESS

Under the direction of the Long Range Planning Committee of the MSSA and with guidance from the Strategic Planning Task Force named by the Committee, the strategic planning process began in early 2013. One major goal of the process was to provide multiple and varied opportunities for members and other important stakeholders to provide input and to review progress throughout the planning process.

For membership, renters, and visitors in general, the first opportunity to provide input was the issuance of a survey for each of those groups distributed on-line and in hard copy in February, 2013. Questions included basic information about affiliation, family size, frequency of visits, etc. as well as questions about satisfaction with various aspects of Assembly life and offerings.

As the Assembly season began, the following process took place to complete the input and deliberation portions of the strategic planning process.

June 14, 2013

- Breakfast: Consultant meets informally with past Assembly Presidents to gain insights, concerns and advice
- Half Day Planning Session Strategic Planning Task Force. St. Andrews, Sewanee. Committee reviews survey results and provides input on vision, mission and values statements
- Evening: Public Forum in Chapel at Assembly. PowerPoint presentation of planning process and survey results. Feedback from the public on four questions with regard to what participants love most about the Assembly, what it means to them, what they want to see preserved about the Assembly or changed

July 11, 2013

- Goal setting homework completed by all members of Strategic Planning Task Force who attended June meeting.

July 13, 2013

- Evening: Public Forum in Chapel at Assembly. PowerPoint review of process to date, input session on what the Assembly should try to accomplish in the next five years

July 20, 2013

- Half day meeting of Strategic Planning Task Force. St. Andrews, Sewanee. Review of Tax Status of Assembly, goal setting exercise, SWOT analysis, strategies and next steps

In December, 2013 the Assembly Board of Directors reviewed and approved the strategic plan as submitted by the Long Range Planning Committee, and determined to proceed with next steps in producing an Implementation Plan companion to the Strategic Plan.

During the first half of 2014, various working groups deliberated on recommendations for achieving the six goal areas outlined in the strategic plan. This work took for form of completing goal implementation worksheets that are included as the Implementation Plan in this report.

STAKEHOLDER SURVEY RESULTS SUMMARY

Three separate surveys were released in early 2013 using Survey Monkey and as requested by hard copy MSSA members and renters, and to the data base listing of friends and family. By the close of the survey response period near the end of March, 167 of 290 members responded, 101 of 690 renters responded and 83 family and friends responded for a total of 377 completed surveys. A composite survey report is in the appendix.

Because of the desire to offer everyone the opportunity to respond, it was not a random sample survey. Everyone had the chance to fill out one survey each and record their ideas, concerns, suggestions and preferences for a full range of aspect of the MSSA's future. The results were meant to provide input and impressions for the remaining deliberative components of the strategic planning process, and to inform, not determine, any later recommendations or conclusions.

The first portion of each survey asked for demographic information and such things as visitation patterns and history of affiliation with the MSSA. Responses indicated the following:

- 46% members and 70% of friends and family (FF) have at least a 20 year relationship with the Assembly while renters do not.
- 34% of members stay the full summer season and 34% stay between one and three weeks in season. 10% are year round residents.
- 82% of renters who stay in season stay less than two weeks.
- FF generally visit more than once a year in season and their stay is mostly not related to any program offerings.
- 43% of members are in residence less than two weeks during the off-season.
- 47% of renters come during the off-season, 74% of them for Sewanee events.
- 39% of members travel more than 250 miles one way to MSSA, and only 38% of them travel less than 100 miles one way.
- 55% of renters travel more than 250 miles one way and 23% less than 100 miles one way.
- In season, 43% of members have a household size of 4-6 people.
- In season 47% of renters have more than six household members and 45% have 4-6.
- 76% of members expect no changes to their membership in the next five years.
- 56% of renters anticipate renting at least once a year in the next five years.

The remainder of the survey was designed to gauge subjective and qualitative responses to questions about various aspects of Assembly life and polices, and about respondents thoughts for its future.

Members

- In general, members were well satisfied with operational aspects of the MSSA, rating highest levels of satisfaction with staff, facilities, in season activities for adults and children, and ability to be involved in governance.
- Overall levels of satisfaction began to diminish on aspects such as board performance, retention value of leasehold, rental policies, annual costs, and long term prospects for MSSA. Even so, most respondents were satisfied rather than unsatisfied with these areas.
- Two areas in which the most respondents rated complete satisfaction were quality of communication of MSSA with members (37%) and staff management and performance (41%).
- Areas in which the most people were completely unsatisfied were dollar value of annual costs (6%), ability of new members to acquire new leaseholds (7%), and rental policies (8%).
- The four areas most often selected by respondents as needing change included off-season activities, common facilities, grounds and services, summer program offerings, and rental policies.

Friends and Family

- In terms of scheduled activities, favorites included speakers, workshops, and classes, closely followed by youth activities and programming. Only slightly less mentioned were outdoor sports activities and religious programming.
- Favorite unprogrammed aspects of the Assembly included the front porch culture, followed by walking and hiking.
- Reducing the cost of housing gate fees and other fees was the most common suggestion for how to encourage more visits by family and friends.
- Many reported that youth programming was perhaps the single most important aspect of the assembly and for many the primary reason for their attendance.
- Areas rating the highest level of satisfaction included the quality of the housing, staff responsiveness and friendliness, staff management and performance, and the condition of facilities, grounds and services.
- Areas of least satisfaction were the summer season activities for adults and youth, and off-season activities.
- Just over half of respondents said changes should be made to improve the MSSA experience including quality of rental housing and facilities, grounds and services.
- There was also some note of the need for improvements in costs, policies or rules, and staffing.
- Just over one third of respondents had considered acquiring leasehold, yet the cost, in particular the lack of a mortgage possibility is a detriment to those considering acquiring a leasehold.

Renters

- Overall, renters indicated little interest in on or off-season programming or activities.
- Respondents reported the highest level of satisfaction with staff responsiveness and friendliness, staff management and performance, the condition of common facilities and grounds, and the rental cottages themselves.
- There was relatively high satisfaction with the dollar value of rental cost and fees yet 8% of respondents noted they were completely unsatisfied with this aspect.
- 73% reported an overall positive rental experience.
- Two thirds of respondents noted there were some areas that could use improvement.
- The top four areas needing change were the quality or condition of cottages, rental policies or practices, cost of various services and fees, and staffing.

MISSION AND VALUES

Prior to discussing any possible update to the MSSA's mission and values statements, Task Force participants reviewed past and current such statements of the MSSA¹, the MSSA's charter and by-laws, and sample statements of other similar, or non-profit organizations around the country. The following statements were created during the first half-day Task Force meeting, reviewed and tweaked at the second one, and presented for public comment at the second of two public forums before being adopted by the board later in the year.

Mission: Our mission is to be a welcoming Christian community where people gather for spiritual growth and renewal, and for educational, recreational and cultural enrichment, while being good stewards of our natural resources and our Assembly heritage.

To do this we:

- Live together in a Christian community
- Offer an active and varied program of events and activities for members, guests, and the community at large
- Create an environment that supports the development of values, character, and leadership in our children and young people
- Provide an intergenerational and family friendly environment
- Are a membership engaged in governing the Assembly and guiding its future
- Take excellent care of the Assembly grounds, buildings, and facilities
- Practice sound financial management to ensure the sustainability of the Assembly
- Is an interactive and contributing partner with our larger mountain community.

Values: We believe

- Our interdenominational Christian beliefs are the bedrock of our community
- In the value of our community traditions, and in the Assembly's Chautauqua heritage
- A safe, caring, and friendly environment promotes spiritual, moral and intellectual growth for people of all ages
- In the centrality of our responsibilities to the children and young people in our midst
- Education is key to a happy life, recreation sustains our bodies, and cultural enrichment is central to creating a civil society
- In being good stewards of the natural and built community around us, and in being good neighbors to those beyond our gates
- That open and respectful consideration and discussion about divergent issues strengthens our community of faith

¹ *"...the advancement of science, literary attainment, Sunday School interests, and the promotion of the broadest popular culture in the interest of Christianity without regard to sect or denomination...and to hold stated public meetings from year to year upon the grounds of the Assembly."*

FIVE YEAR GOALS WITH SUPPORTING STRATEGIES

During the 2013 Strategic Planning Process, six broad comprehensive goals were established by the Task Force for the five year period. These goals are action oriented, quantifiable, and designed to best accomplish the overall MSSA mission. Each one is briefly discussed below, along with draft strategies for achieving each goal.

Goal 1. Enhance Overall Assembly Quality of Life

- Strategy A. Create a More Welcoming Atmosphere
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- Strategy A. Target Potential Members and Renters
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Goal 1. Enhance Overall Assembly Quality of Life

In general, members, friends and family, and renters are satisfied with the quality of life in the Assembly. But several common themes emerged in the strategic planning process among members in general and in the Task Force meetings. The strategies below reflect those themes.

- A. Create a More Welcoming Atmosphere. Efforts could be made to be a more warm and inviting community, in particular to new members, renters, visitors, children, and neighbors. Community picnics and informal gatherings for anyone who wants to come were mentioned. Might this have a physical aspect as well such as a community bulletin board, or morning coffee truck set up in a central location, etc.? Perhaps some type of festival or offering could be geared specifically to attract neighbors outside the gates to nurture community relations.
- B. Improve Communications Among Members, Friends, and Visitors. This could include more robust use of the website and enhanced communications features available for websites as well as increased use of social media. Communications technologies ranked high on the list of opportunities ahead for the Assembly.
- C. Enhance Community Outreach and Community Service Programs. There is a desire to contribute to programs and efforts beyond the Assembly gates as part of the Christian based mission of the Assembly, particularly given the significant unmet human needs on the Plateau. Yet the tight timeframes of the summer season and the fact that often members live hundreds of miles from Monteagle makes planning and conducting meaningful outreach a challenge. It is recommended that Assembly members work toward one or two topical areas best suited for their outreach efforts where likely community partners exist and evolve those over time. Also, it might be advantageous to create a link to the new community outreach programs at the University of the South.
- D. Be more Environmentally Friendly. Having a recycling program was mentioned regularly. It was felt that the Assembly's value of the natural environment of the mountain should also extend to environmentally sustainable practices on the grounds. Energy efficiency, a community garden, community composting, and further limiting car use on the grounds were mentioned. Perhaps this area is also conducive to some type of outreach program.
- E. Enhance Our Diversity. Lack of diversity of the Assembly was ranked near the top of the list of Assembly weaknesses by Task Force members. Lack of diversity (in background, religion, income, etc.) was mentioned as something that limits the opportunity of members, friends and family to reap the full benefit of coming together every summer in spiritual and educational pursuits, and limited the possible

broader appeal of the Assembly to new members – diverse or not. Diversity could possibly be enhanced through specific platform programming, targeted welcoming events, and focused marketing efforts.

Goal 2. Increase Participation Among all Groups in Programs, Events, and Activities

The very heart of the Assembly is its Platform – the spiritual, educational, cultural and recreational programming it provides to members and visitors of all ages, and to the community at large. It impacts everyone and the community as a whole.

Understandably, more ideas were expressed on the Platform than on any other topic in the strategic planning process.

People appreciate the need for the Platform offerings to be excellent but also to be affordable to the Assembly. And while larger attendance is desired, there are space and access issues to be considered. The single most important threat that task force members noted for the future of the Assembly is the fact that families have busier lives with greater competition from other summer activities such as team sports, and shorter summer breaks, making it less possible for families to spend much of the season in Monteagle. Obviously this issue cannot be fully addressed by changes to the Platform, but members may ask how Platform structure or offerings may help to mitigate its impact. Suggestions can be grouped into two broad strategies, programming itself and improved marketing of offerings.

A. Increase Platform Appeal to all Participant Groups. Even a well-honed annual program can benefit from fresh thinking and fresh approaches. This can start with revisiting the fundamental purposes of the Platform offerings and its overall goals and objectives and then ask how well it has been achieving those goals. Are the most important strengths and opportunities of the Assembly – its location and natural setting, Christian principles, proximity to Sewanee, and intergenerational nature - being maximized? Are there ways to mitigate the shortened time available to families by programming special long weekend programs similar to Elderhostel, etc.? Can off season programs be made more attractive? Be willing to put at least everything on the table at first for examination. A target date should be placed on when the review and new recommendations will be complete. Platform committee led discussion groups could be informed by results of the 2013 survey. Discussion groups might organize around three topical areas – adult, youth, and worship-faith programming.

B. Increase marketing and outreach to potential visitors. Assembly members believe their programs could have much wider public appeal if attention was paid to marketing to the Monteagle area and to Chattanooga, Birmingham, and Nashville. This could also increase rental nights spent at the Assembly. At the same time members don't always adequately support the programming themselves. One of the great appeals of the Assembly is the slower pace and sense of respite and this is not always compatible with taking part in a lot of programmed activities. Could the impulse to slow down be countered with Platform changes? Tapping a professional

marketing consultant might be a good thing to consider as might using focus groups to test new ideas.

Goal 3. Periodically Evaluate the Governing Structure and Practices of the MSSA

A. Periodically Perform a Legal/Tax Status Study. Significant interest was expressed by Task Force members, 2013 Stakeholder Survey respondents, and June and July public forum attendees in addressing issues with a direct bearing on the MSSA's tax status. The crux of the matter hinges on the MSSA's tax code classification as a church and the extent to which this classification allows the Assembly to remain sustainable and operate in a way that reflects its needs and challenges.

This tax status has ramifications for a number of issues, such as changes to the leasehold transfer process to make it easier to buy a house in the Assembly, and the desire to alter the current governing structure to be more efficient. Leasehold transfer and cost issues ranked the top of the prioritized list of MSSA weaknesses, and among the top threats facing the institution.

At the same time, some Task Force and Assembly members strongly oppose considering changes that may in any way call the current tax status into question, including changes to leasehold transfer policies. Given the seriousness and potentially contentious nature of this issue, it is recommended the Board authorize a Legal/Tax Status Study to provide a more current and carefully considered base of information and recommendations. Creation of this study assumes there is a sufficiently compelling case that the Assembly may not be able to successfully defend its status as a church should that status be called into question by the IRS. The study is a proactive measure.

It is recommended that the Board name an ad hoc task force of MSSA members, authorize them to consult legal and financial expertise as appropriate, and to consult with any other relevant Chautauqua organizations. The Task Force will:

1. Be named by the Board by the end of calendar year 2014 and will present its final report to the Board during the 2015 summer season.
2. Operate according to a scope of work as created by the board
3. Operate in a confidential manner until such time as the Board chooses to make the final report public.

B. Periodically Review Board Structure and Governing Policies. While there is considerable satisfaction with board leadership of the Assembly, there is also concern that some longstanding aspects of board structure are not as effective as in the past. Aspects most often discussed for change include the size of the board, the caucus representation system, committee structure, and election process.

It is recommended that a review of board structure and policies be authorized and that non-board and non-governance committee members be included in the group that will review and make recommendations on any changes. At least one of the reviewers should also be a part of the Legal/Tax Status Study. Changes to be reviewed should include:

- Optimal board size and term limits
- Election and succession policies for leadership and committee chairs
- Possible improvements to or removal of caucus system of representation
- More effective procedures for meetings, communications, decision making, etc.
- Increasing board diversity
- Possible alternate types of memberships and voting status
- Appropriate transition to any new structure

Goal 4. Increase the Financial/Fiscal Sustainability of MSSA, Define Measureable Benchmarks

A. Facilitate Leasehold Transfers. At every point in the strategic planning process, the cash in full requirement for purchasing leaseholds was discussed. There is a growing sense of urgency about this due in part to the large number of leaseholds on the market and the slow turnover of those available. The expense of leaseholds was rated the most important weakness of the Assembly by the Task Force and the third most important threat to the Assembly's future.

Because of the nature of changing the leasehold transfer process, and the concern it may have ramifications for the Assembly's tax status, this issue should be debated as part of the Legal/Tax Study recommended for helping achieve goal no. 1.

B. Grow the Endowment. Various target increases for the endowment and for the overall value of Assembly assets were suggested during the planning process. The Board should work to create a specific endowment growth goal. Perhaps the Board may want to consult with an investment specialist to assist in exploring the feasibility of an endowment campaign. Task Force members noted that even though members are heavily invested in their own leaseholds, they do not consider the Assembly near the top for their own personal charitable giving. This presents an opportunity area for revenue growth and a planned giving campaign should be contemplated.

A number of mentions were made of using the endowment to help finance the purchase of leaseholds and this should be explored as part of the recommended Legal/Tax Status Study.

- C. Promote Membership Growth. Currently membership growth equates with ownership of leasehold, so to grow membership means either sale of vacant lots for new houses, or creating other types of memberships not expressly tied to leasehold ownership. There was some reluctance expressed to either of these but also some willingness to explore the topics. In any case, the most important aspect of membership growth seems to be promoting the more rapid sale of leaseholds on the market to new active members.
- D. Increase Non-member Revenues. Non-member revenues are of two kinds, gate revenues from renters and visitors (discussed in goal 1 and 6 as well), and rental fees for assembly residences. The rental revenues are minimal for Assembly owned buildings and probably in the next few years have little revenue growth potential.

It is believed gate revenues can be increased without making the overall Assembly experience less affordable, but they need to be considered as part of the overall costs associated with visiting or residing in the assembly. The thought is to do this through enhanced programming and marketing.

While rental nights have been increasing, with greater attention to marketing, enhanced connections to Sewanee, greater encouragement to leaseholders to rent out their houses, and an improved rental experience in general, significant rental revenue increases could result. Perhaps a rental task force could be charged by the Board to systematically think through a new rental strategy in concert with development of a marketing plan. In any case, a quantifiable goal to increase the rental nights should be made so an appropriate set of strategies can be crafted.

Goal 5. Determine the Ideal Physical Plant and Footprint, to Enhance and Expand Assembly Grounds

- A. Evaluate Potential Expansion of Assembly Footprint to protect and enhance the Mission. The Assembly is a good steward of its landholdings and members know that one of the attractions to being a part of the Assembly, or to visiting there is the incredibly beautiful natural setting. Members understand the importance of adding to the Assembly grounds as adjacent properties may come available, with or without structures, as an investment for the future quality of life of the community. This practice should continue.
- B. Evaluate Feasibility and Need for Year Round Facilities. Task Force members and others noted that the ability to provide more robust off season programming, or to provide a more complete range of possible non-housing rental facilities is limited by lack of adequate climate controlled buildings for common use. Making one or more facilities more convenient for year round use, or providing a new building should be thought through as a part of revisiting Platform planning and as part of any overall increase in rental strategies.

- C. Define Facilities Maintenance/Replacement Plan. General upkeep and quality of the Assembly common buildings and grounds rated a high satisfaction level from all segments responding to the 2013 Survey, there was mention in the Task Force work of the need for a systematic plan for other than routine maintenance and/or system or building replacement.

Goal 6. Increase/Enhance Overall Marketing and Promotional Efforts

- A. Target Potential Members and Renters. The Assembly has taken a rather low key or mouth to mouth approach to marketing but most members seem to realize this is no longer adequate. The untapped potential of marketing the Assembly ranked right behind the geographic location and proximity to Sewanee as important opportunities for the Assembly. The considerable benefits of assembly participation documented during the strategic planning process, they could be valuable in helping create a marketing plan.

It is recommended that the Board of Directors tap any marketing expertise among members and use their advice to engage a marketing professional to create a targeted marketing plan to be implemented in time for the next summer season.

This plan should take into account, at a minimum:

- How to help transition renters into buyers
- How to use existing members to market more effectively to others
- The best geographic target markets
- How to better communicate the benefits to busy families
- How to make better use of the website and social media
- How to reach more potential leasehold purchasers
- How to expand the rental market year round
- How to work more closely on joint marketing with Sewanee

- B. Market to Increase Gate Revenues. It is generally believed the right balance between too many visitors and not enough visitors has not yet been reached. While people value the community's quiet and slow pace, gate revenues do assist the financial bottom line and make it possible to have more resources for programming. It was also mentioned by Task Force members and in the public forums that there are too many types of fees associated with staying or visiting the Assembly and this might be looked at in a more comprehensive way.

The marketing aspect of gate revenues would be to market the attractions of visiting the Assembly for a special event to nearby communities to attract more people who might also consider overnight stays. Perhaps special overnight travel packages could be developed and marketed. Considering the casual visitor should Create and execute a plan for hiring a part time development/marketing manager by end of 2014, to go full time in 2016.

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS ANALYSIS

Following the creation of the broad comprehensive goals, but before the development of specific strategies to achieve those goals, Task Force participants analyzed the road ahead of them by doing a SWOT analysis. They listed the strengths and weaknesses internal to the organization, and the opportunities and threats it faces from the external environment or from external forces that could impact the achievement of the selected goals. Then through a ranking exercise the most important items in each category were selected. Each category lists the priority items in order, with the number of votes recorded for each item during the exercise. The complete listing is contained in the appendix.

Strengths of MSSA

- Location – the location – location (12)
- Christian principles and focus (12)
- Quality of life (12)
- Passion and love of members and families for the MSSA (9)
- Strong staff and board leadership (4)
- Tradition and rich history (3)
- Passion of the full community (2)
- The Manager and overall management (1)
- Diverse talent of members (1)
- Financial management (1)

Weaknesses of MSSA

- Expense of leaseholds (14)
- Desire to remain the same – fear of change (9)
- Not diverse in its membership (9)
- Lack of consistency in governance (7)
- Aging demographic of members (7)
- 80 – 20 rule in force (6)
- Don't tell the story of the MSSA well enough (3)
- Underutilized committee system (2)
- We are not our own philanthropic priority (2)
- Weak appeal of MSSA to the younger generation (1)
- Sense of not being heard by some members (1)
- Small budget (1)
- Board structure and election process (1)

Opportunities in the External Environment

- Location and natural environment (15)
- University of the South and other potential collaborators (10)
- Untapped marketing opportunities (9)
- Technology for communicating (5)
- Need for respite (3)
- Social media (3)
- Golf and Mountain Goat Trail (3)
- Popularity of heritage tourism (2)
- Change of pace – history (1)
- Nearby target residential communities (1)

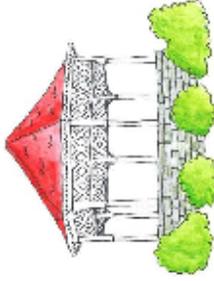
Threats Facing the MSSA

- Busy family lives – youth sports and activities, school calendar (16)
- Not cost competitive for a family vacation (15)
- Overvalued houses – relationship to the external real estate market (14)
- Loss of tax exempt status as a church (3)
- Lack of vision (3)
- Declining societal interest in religion (2)
- Other area places to stay (2)
- Technology (1)
- Ease of travel to other places (1)
- Lack of knowledge of MSSA heritage-history of new members (1)

ONE TO TWO-YEAR IMPLEMENTATION PLAN

Following the intense work of strategic planning during the summer season 2013, creation of a more detailed Implementation Plan offered MSSA members, through the work of various teams and committees, the opportunity to take the strategic plan to a more day to day operation level. This Implementation Plan is meant to guide the ongoing work of staff and volunteers toward the achievement of the six broad goals.

Worksheets were used by each working group to help clarify their thinking and to bring consistency to the level of work projected across all six goals. The worksheets are attached to this report as the Implementation Plan.



Monteagle Sunday School Assembly - Goal Implementation Worksheet

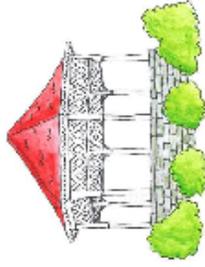
Goal 1: Enhance the overall Assembly quality of life

Work Group/Team Members:

Date:

Strategy A : Create a more welcoming atmosphere

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Improve the front gate experience	2015 season	Education, appearance, staff training	Business Manager		
2. Announce new members in Mountain Voices	2015	Introduce new members with a short bio and story	Membership Committee		
3 Increase use of bulletin boards	2015 season	add additional bulletin boards around the campus	Platform	More bulletin boards	
4 Expand Friends Program	2015	Friends Committee	Friends Committee		
5 Reach visitors through Sunday School and Youth Program	2015 season	Sunday School teachers and youth staff outreach to visitors	Housing office (rental list) Sunday School Committee, Youth Committee		
6 Create a gathering place for morning coffee	2015 season	Provide newspapers, coffee and a gather place	Welcome Committee		



Monteagle Sunday School Assembly - Goal Implementation Worksheet

Goal B: Enhance the overall Assembly quality of life

Work Group/Team Members:

Date:

Strategy B : Improve communication among members, friends, and visitors					
Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Mountain Voices					
2. Social Media					



Monteagle Sunday School Assembly - Goal Implementation Worksheet

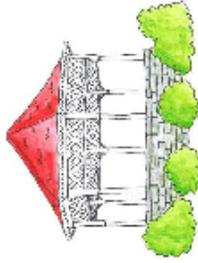
Goal I: Enhance the overall Assembly quality of life

Work Group/Team Members:

Date:

Strategy C : Enhance Community Outreach and Community Service programs

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Continue monetary support for agencies	2015		Outreach Committee	Money	
2. Create an in season activity	2015	Create a community service project during the season to involve members and guests	Outreach Committee		
3. Highlight local organizations which MSSA supports	2015	Increase awareness of our sponsorships and the work they perform	Outreach Committee		



Monteagle Sunday School Assembly - Goal Implementation Worksheet

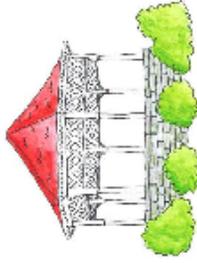
Goal I: Enhance the overall Assembly quality of life

Work Group/Team Members:

Date:

Strategy D : Be more environmentally friendly

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Create a recycling program	2015	Establish recycling bins and procedures	Sustainability Committee	money	
2. Install motion detection for lighting	2016	Reduce energy costs for unused buildings	Property committee	Money	
3. Increase awareness of community garden, biking, walking, golf carts	2015	Reinforce ways to reduce the carbon footprint	Sustainability Committee	MV articles	



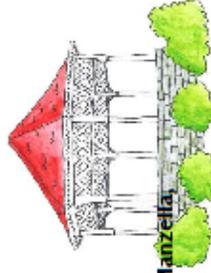
Monteagle Sunday School Assembly - Goal Implementation Worksheet

Goal 1: Enhance the overall Assembly quality of life

Work Group/Team Members:

Date:

Strategy E : Enhance our diversity						
Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks	
1. Define diversity within MSSA	2015	Establish study group	President			
2. Foster openness to a more diverse Membership	2016		President			
3. Embrace different views, cultures, races, religions in programming	2016		Platform Committee			



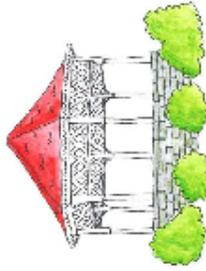
Montegle Sunday School Assembly - Goal Implementation Worksheet

Goal 2: Increase Participation Among all Groups in Programs, Events, and Activities

Work Group/Team Members: Susan Acker, Mary Balfour VanZandt, Anne Worthern, Katie Trahan, Maggie Baxley, Becky Nelson, Louise Manzeila, Ashley Baine

Date:February 14,2014

Strategy A : Increase Platform Appeal to all Participant Groups					
Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. To have 1 "Big Ticket" event each summer featuring a noted speaker or performer.	Ideas for venues received during the course of the season.	<ul style="list-style-type: none"> -To find and hire a keynote speaker or performer that has mass appeal. -Use existing membership and friends of Montegle for suggestions. -Hiring to be done on the off season. -Event should be publicized in other areas beyond website and program. 	<ul style="list-style-type: none"> -Becky Nelson with Assistance from the Platform Committee and member contacts or suggestions. 	<ul style="list-style-type: none"> -Combining multiple endowments to create one big event in place of several smaller venues. -One time family donation to honor a family member. -Create a "Special Event" Endowment. 	<ul style="list-style-type: none"> Email trail can be provided but our team all felt that the program is solid and does it's best to provide for several different age groups as well as interests. The Assembly provides many areas of interest that go beyond the programs. Personal choice and weekly populations are hard to predict.



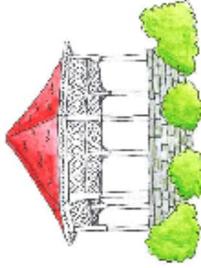
Monteagle Sunday School Assembly - Goal Implementation Worksheet

Goal 3: Evaluate the Governing Structure and Practices of the MSSA

Work Group/Team Members:

Date:

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
<p>Strategy A: Undertake a competitive selection process to identify a tax advisor that provides quality tax advice with a reasonable fee</p> <p>1. Identify tax needs of the MSSA</p>	<p>can be started as soon as strategic plan approved, preferably before so that the RFP process can be started as soon as possible</p>	<p>- form task force</p> <p>- meeting with GM and legal/finance committee</p> <p>- identify MSSA activities that implicate tax issues</p> <p>-develop a statement of needs</p>	<p>Board to appoint task force</p> <p>Task force to develop needs description</p>	<p>Assess to historical tax analysis;</p>	
<p>2. Develop RFP to govern the selection process</p>	<p>- total time for this task: 2 weeks</p>	<p>-develop a selection process</p> <p>-prepare RFP</p>	<p>Task force</p>		



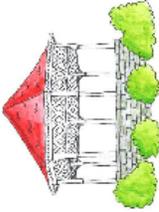
Mont eagle Sunday School Assembly - Goal Implementation Worksheet

Goal 3: Evaluate the Governing Structure and Practices of the MSSA

Work Group/Team Members:

Date:

Strategy B: Undertake a review of Governing Structure and Practices of the MSSA					
Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Identify Task Force to undertake review - recommended size - 5-7 members representing m	4-weeks	- meeting with GM and President Elect and Board Members to identify potential TF members - meet with potential TF members to extend invitation - meet with TF once formed to specify scope of work and format of deliverable	President		

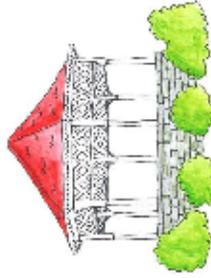


Monteaagle Sunday School Assembly - Goal Implementation Worksheet

Goal: 3: Strategy C - Educate membership on implications of MSSA tax status
Work Group/Team Members:

Date:

Strategy C:					
Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Provide Forum to educate members on the facts of 501(c)(3) church status - including types of activities allowed	During season	Contact platform to secure time at various planned public meetings (town halls etc)	GM/President/Legal Chair		perhaps questions submitted in advance
2. Set out and communicate process for answering questions on a go-forward basis to avoid "rumor"	Ongoing	Identify person to receive/vet questions and gather answers	GM/President/Legal Chair	space in Mountain Voices	



Monteagle Sunday School Assembly - Goal Implementation Worksheet

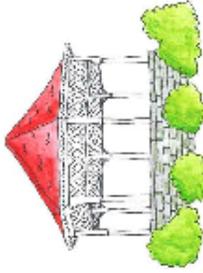
Goal 4: Goal: Increase Financial/Fiscal Sustainability for MSSA and Define Measurable Benchmarks

Work Group/Team Members: Jim Humphreys, Pat Wildman, Dede Clements, Henry Crais

Date: June 25, 2014

Strategy A : Facilitate Leasehold Transfers

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Define objectives and benefits to the Assembly & leaseholders of transferring Leaseholds	As soon as possible after board approves long range plan	Prepare written report for Task force to follow	LRP Comm	None	
2. Form Task Force to study leasehold transfers	One month after board approves plans	Select task force members & outline purpose of task force	President, BOT	None	
3. Compile lists of internal tasks that current committees can do to now increase interest in transferring leaseholds	Within 3 months of formation of task force	Meet with committee heads to assist with assigned tasks (some ideas attached in 6/25/14 document)	Task force	None	
4. Define and evaluate options for facilitating leasehold transfers	9 months	Prepare detailed report on transfer options	Task force	Funds for professional svcs	
4. Present to Board	Summer 2015	Approve or reject program	Task force		



Monteagle Sunday School Assembly - Goal Implementation Worksheet

Goal 4: Increase Financial/Fiscal Sustainability for MSSA and Define Measurable Benchmarks

Work Group/Team Members:

Date:

Strategy B : Grow the Endowment

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Develop range of activities to pursue	3 Months	Meet with Endowment Develop strategies & define which committees can be used to assist with effort Additional ideas from 6/25/14 meeting	MAEFC Committee with selected LRP members	None	



Monteagle Sunday School Assembly - Goal Implementation Worksheet

Goal 4: Increase Financial/Fiscal Sustainability for MSSA and Define Measurable Benchmarks

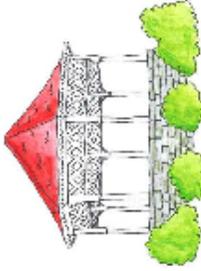
Work Group/Team Members:

Date:

Strategy C : Promote Membership Growth

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Form Marketing staff	1 month	Identify staff & members that would make up a Marketing committee	LRP, GM, President	None	
2. Appoint Committee	1 month	Facilitate first meeting	LRP, GM	None	
3. Develop comprehensive marketing plan	7 months	Plan program and prepare detailed outline of program for board approval	Mktng Committee	Unknown	
4. Implement program	1 month		GM & Committee	Unknown	

Monteagle Sunday School Assembly - Goal Implementation Worksheet



Goal 4: Increase Financial/Fiscal Sustainability for MSSA and Define Measurable Benchmarks

Work Group/Team Members:

Date:

Strategy D : Increase Non-Member Revenues

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Form Task Force	2 Months	Appoint special committee made up of Finance, Marketing Membership (See suggestion from 6/25/14 meeting)	President		
2. Develop plans	6 Months	Prepare report for Board to Implement plan in 2015			



Monteagle Sunday School Assembly - Goal Implementation Worksheet

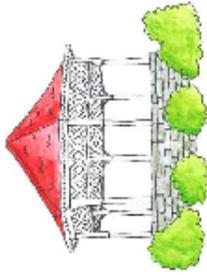
Goal 5: Determine the Ideal Physical Plant and Footprint

Work Group/Team Members:

Date:

Strategy A : Evaluate Potential Expansion of Assembly Footprint to protect and enhance the Mission

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1 Identify task force of members of LRP, Property and other relevant committees; target size 5-7 members	2 weeks	President/GM identify task force members	President/GM		
2 Evaluate current footprint and inventory adjacent land (owner, ownership history, value, location, limits on use and other known information)	6-8 weeks		Task Force	land maps, access to real estate records; consultation with local real estate agent	
3 Evaluate available land in light of strategic goals and prioritize according to goals	6 weeks		Task Force		



Monteagle Sunday School Assembly - Goal Implementation Worksheet

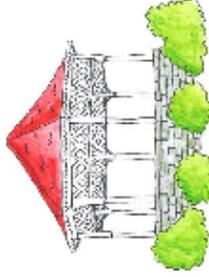
Goal 5: Determine the Ideal Physical Plant and Footprint

Work Group/Team Members:

Date:

Strategy B : Evaluate need for and Feasibility of Year Round Facilities to support strategic plan

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1. Form Task Force (5 members from relevant committees)	3 weeks		President/GM		
2. Evaluate Strategic Plan - goals/strategies/tasks to determine ways year round facilities could assist in achieving goals	6 weeks after plan approved		Task Force	Strategic Plan; access to members of other task forces identified in Goals/strategies	
3. Identify potential Assembly buildings for evaluation for feasibility for year round use	concurrent with evaluation above		Task Force	Access to Facility superintendent	
4. Evaluate feasibility of converting identified Assembly buildings for year round use(including cost, revenue expectation).	8 weeks after potential buildings identified		Task Force	access to Facility Superintendent; contractors who can scope/price work	
5. Make recommendation to Board if any Assembly buildings are identified as feasible prospects	4 weeks after feasibility evaluation completed		Task Force		



Monteagle Sunday School Assembly - Goal Implementation Worksheet

Goal 5: Determine the Ideal Physical Plant and Footprint

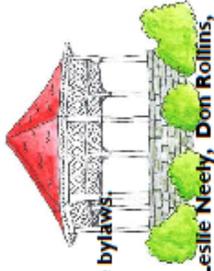
Work Group/Team Members:

Date:

Strategy C : Maintenance/Replacement Plan

Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
1 Form task force (5 members - property and other relevant committees with any experts within membership)	3 weeks		President/GM		
2 Review existing maintenance and capital improvement plans	6 weeks after task force appointed		Task Force	Access to existing maintenance and capital improvement plans); meetings with GM and Facility Superintendent	
3 Work with Ground Superintendent to determine existing gaps/weaknesses and plans	concurrent with review above		Task Force		
4 Identify best practices in maintenance and capital improvement plans	8 weeks after task force appointed		Task Force, Facilities Supt.; GM	time with contractor/ construction expert who can advise on best practices	
5 Recommended needed updates for maintenance/capital improvement plan	12 weeks after task force appointed		Task Force		

Monteagle Sunday School Assembly - Goal Implementation Worksheet

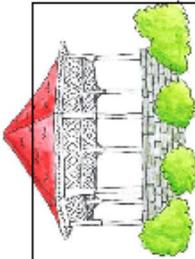


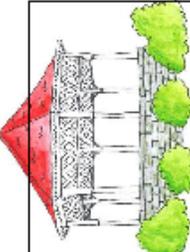
Goal 6: Increase/Enhance Overall Marketing and Promotional Effort that support the mission and purpose of the Assembly as stated in the bylaws.

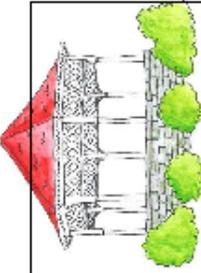
Work Group/Team Members: Lisa Hammett, Amanda Moody, Marty Buffington, Dianne Black, Karen Dismukes Cooper, Perian Strang, Leslie Neely, Don Rollins, Clark Hudgins

Date: July 2014

Strategy A : Market to Increase Gate Revenues					
Objectives	Timeframe	Primary Tasks and Timeframe	Responsible Party(s)	Resources Needed	Dated Remarks
Develop a campaign Theme	3-6 months	Brainstorm using MSSA mission and vision and LRP	marketing manager and committee		
Consider a professionally designed and produced brochure	6-9 months	Confer with GM and housing manager to determine need for print and/or online version. Is a tangible brochure the best way to reach potential renters/buyers or is our target market more technologically and social media savvy?	marketing manager and committee	\$\$	
Distribute brochure to targeted mailing list	9-12 months	Generate mailing lists per narrative (members, rents, other Chautauquas etc)	marketing manager and committee	\$\$	
Change MSSA policy on advertising	9-12 months	Loosen restrictions and guidelines so we have more freedom to promote MSSA while still adhering to our mission and vision	GM, board, marketing manager/committee		

		marketing manager and committee	<p>PR pitches to appropriate outlets (Birmingham Magazine, Nashville Lifestyles, Nashville Parent-type publications along with travel writers at major newspapers and travel publications, Travel channel, offer FAM trips for travel writers</p>	12+ months	PR Outreach
	Buy in from cottage owners to rent for reduced rate, strategic partnerships with local orgs/events	marketing manager and committee	<p>Outside the season, develop travel packages and pitch to groups such as AARP, AAA, travel writers, etc. Could bundle with special events such as Trails and Trilliums, Sewanee Lessons and Carols, hiking adventures. MSSA would offer special weekend rentals and rates and package with dinner for two at Pear's or Ivy Wild; lunch at Shenanigan's, etc. We would work with local businesses to include coupons and other offers.</p>	12+ months	Develop Travel Packages
		Marketing manager with support/coordination with housing manager	<p>Change MSSA policy on advertising and follow with Market the Assembly AS A WHOLE (not individual cottages) through VRBO, Home Away, etc.</p>	12+ months	Leverage Rental Sites

<p>Launch a social media campaign</p>	<p>24 months</p>	<p>Generate full strategy, outlining which platforms we will use and what information/stories will be included. Thoughts: YouTube: create and post videos on private channel so we have to "let" people see them. webisode series featuring performances, day in the life, clips of outings.</p>	<p>Marketing manager and marketing committee</p>		
<p>Examine Our Costs/Fees</p>	<p>6-12 months</p>	<p>Cost of rental and purchases is an issue--can we reduce cost for young families to rent/down? How can we make it more affordable? See narrative for ideas</p>	<p>Marketing and Finance committees</p>		
<p>Make Leasehold Transfers More Financially Viable By Offering Mortgages</p>	<p>12-24 months</p>	<p>MSSA should consider setting up its own finance company (requires policy change)</p>	<p>GM, finance committee, board marketing committee, board</p>		
<p>Search engine optimization</p>	<p>9-12 months</p>	<p>Plan, pay for and implement SEO so that MSSA shows up higher when topics like "Tennessee vacations" are entered.</p>	<p>Marketing manager</p>	<p>\$\$</p>	

<p>Tourism Outreach</p>		<p>Pirch regional Tourism directors/Convention and Visitors Bureaus –can we get into their materials? Talk to them about being spotlighted as they promote accommodations, points of interest and family activities. Place brochures at the South Cumberland recreation area</p>	<p>Marketing manager/committee</p>		
<p>Improve renter/guest relations</p>	<p>6-9 months</p>	<p>Host weekly socials (to retain renters and convert them to buyers) Renters can sometimes feel alienated. This would provide a forum for those who don't have as many connections...and very different from parents' meeting. See narrative for more</p>	<p>Marketing manager/committee</p>		
<p>Connect with potential co-marketing partners</p>	<p>6-12 months</p>	<p>Identify and reach out to like-minded organizations: tennis or golf clubs; REI (outdoorsy people), hiking walking, bird watching clubs, team green (Lightening 100), charities that do work on the mountain, Climb Nashville, architectural schools, historic rehabilitation clubs, Omore School of Design. Consider offering a fee discount for other 501C3 organizations</p>	<p>Marketing manager and committee</p>		

APPENDIX A: COMPOSITE SURVEY REPORT

First General Section

Members – 167 respondents – of 290

Renters – 101 respondents – of 690

Friends/Family (FF) 109 respondents (83% are family of members)

Total – 377

Length of Affiliation

- 46% (56) of members have been so for over 20 years compared to 70% (association rather than membership) for FF. But 62% of renters have less than five years of association with MSSA.
- 14% of members have been so less than five years and 9% of FF have less than five years association.

Length of Stay – in Season

- 34% of members stay the full summer season and 34% stay between one and three weeks in season. 10% are year round residents.
- 82% of renters who stay in season stay less than two weeks.
- FF generally come more than once a year in season – 62% (68) and stay overnight. One third of them come every year. Their visits are mostly not related to any programmed activities.

Length of Stay – Out of Season

- 43% of members are in residence less than two weeks during the off-season
- 47% of renters come during the off-season, 74% of them for Sewanee events and 29% for personal retreats. 66% of out of season renters stay less than week.

Distance Travelled

- 39% of members travel more than 250 miles one way to MSSA, and only 38% of them travel less than 100 miles one way.
- 55% of renters travel more than 250 miles one way and 23% less than 100 miles one way.
- FF travel distance is similar to members, with 38% travelling more than 250 miles and 37% travelling less than 100 miles.

Household Size

- In season, 43% of members have a household size of 4-6 people. 18% have more than six people. Out of season, 60% have three or less household members.
- In season 47% of renters have more than six household members and 45% have 4-6. 54% of out of season renters have 4-6 people.

Anticipated Five Year Changes in Practice

- 76% of members expect no changes to their membership in the next five years. For those who do expect changes the reasons given are plans to spend more time at MSSA (10), house renovations (5), sale of house/share (6), shift of house to children (5), expansion of membership (3), downsizing (1), and addition of a small 2nd dwelling (1).
- 56% of renters anticipate renting at least once a year in the next five years. If they don't plan to come back, reasons given include children graduating from Sewanee (8), too far to travel, (1), too expensive (1) and had a bad rental experience (3).
- 68% of FF foresee no change in their attendance habits but if so 12 of them say they plan to spend more time at MSSA in future years, and seven say they plan to spend less time there.

Membership Specific Survey Results

Overall Satisfaction Level across 12 General Areas

- In general, members were well satisfied with operational aspects of the MSSA, rating highest levels of satisfaction with staff, facilities, in season activities for adults and children, and ability to get involved in governance.
- Overall levels of satisfaction began to diminish on aspects such as board performance, retention value of leasehold, rental policies, annual costs, and long term prospects for MSSA. Even so, most respondents were satisfied rather than unsatisfied with these areas.
- Two areas in which the most respondents rated complete satisfaction were quality of MSSA communication with members (37%) and staff management and performance (41%).
- Areas in which the most people were completely unsatisfied were dollar value of annual costs (6%), ability of new members to acquire new leaseholds (7%), and rental policies (8%).
- 32 respondents registered individual remarks. Some of the most common included:
 - Poor member participation in programs
 - desire to keep the family centered community feel
 - concern for the number of cottages for sale
 - concern about maintaining the church community aspect

Areas Needing Change

- Respondents were invited to choose any of nine areas in which they thought changes should be made and then describe in more detail the changes they would like to see. Over one third of respondents skipped this question.
- The four areas selected the most for changes included off-season activities, common facilities, grounds and services, summer program offerings, and rental policies.

Summer programming suggestions sample (42)

- More relevant timely, and varied lectures and workshops not given by MSSA members
- More challenging, active, and service oriented programs for young people
- More arts and crafts and culinary programs
- Improve children's programs
- More dances
- Higher quality adult programming

Common facilities, grounds, and services suggestions (44)

- Need for recycling services
- Swimming pool maintenance policies and opening hours
- Condition of trees and general landscaping maintenance
- ADA restrooms at the dining hall
- General upkeep of facilities and bridges

Cost of various services, fees (30)

- Look at reducing various costs and fees overall
- Charges for water and sewer are too high
- Need to look at renter and visitors fees

Governing structures or policies (37)

- General dissatisfaction or confusion about caucuses
- Board is too large
- Need for improved communication and transparency
- Committee structure needs reconsideration

Staffing (23)

- Better staffing for young children and youth programming
- Rental and housing staff need improvements
- General manager both praised and critiqued

Leasehold acquisition policies (40)

- Review new options for financing purchases of leaseholds, including mortgages
- Cost of leaseholds are too high
- Open up new lots

Rental policies or practices (40)

- Make the rental process simpler and more efficient
- two respondents don't want rental at all
- Improve outreach to potential renters

Off-season activities (40)

- More outdoor activities such as hiking biking, guided walks
- Extend pool season
- Have more weekend and holiday programming
- Church related gatherings and retreats

Others (13)

- More interaction with Sewanee and St. Mary's spiritual offerings and use of assembly for church retreats
- Hold an annual draw event for visitors from the surrounding area

Concerns about the prospects for the future of the MSSA (77)

Just more than half of respondents skipped this question. A sampling of responses is below.

- Concern for the rising costs of the leasehold and its maintenance and the ability of new people to acquire leasehold
- Fear of losing what has been traditionally special about the MSSA and the family-friendly church centered atmosphere
- Concerns about becoming more exclusive and less diverse as a membership
- Concerned about the resistance to change
- Concerned about continued attractiveness to renters
- Need for better youth programming to continue to be attractive to young people
- Changing family demographics and recreational preferences
- Concern about whether the tax status and costs prohibit making necessary changes

Involvement in strategic planning preferences

Of 131 respondents, 47% don't expect to be very involved but want regular communications about the process. Twenty people left remarks, sampled below.

- I am interested, but very busy, including when at the MSSA
- If I can be of service, let me know

Friends and Family (FF) Specific Survey Results

Expected role in the assembly over the next 10 years.

- 82 respondents left comments to this question and the majority anticipate little or no change in their current visitation and involvement practices.
- About 1/5 of these expect to and want to begin to play a more active role, such as working with the youth programs, spending more time at the assembly, or getting involved in board or committee service.
- 12 indicated an active interest in or intention of becoming members in the future.

Favorite programmed activities

- 97 respondents left comments to this question and sometimes they had multiple favorites.
- In terms of frequent activities, the favorite broad group was speakers, workshops, and classes, closely followed by youth activities and programming. Only slightly less mentioned were outdoor sports activities and religious programming.
- The Fourth of July festivities are a clear favorite with many people and a highlight of the season for some.
- Of less frequently scheduled activities, those most often mentioned were cottage tours and the bazaar, and on and off-site musical events. Evening activities were also commonly mentioned, including movies and dances.

Favorite unprogrammed activities

- More comments were received about with the front porch culture than any other aspect of life at the assembly, other than walking and hiking. Both the social and the solitary natures of the front porch were roundly appreciated. It was most often mentioned in the context of the attraction of visiting with family and friends.
- The beautiful walkable grounds as well as the many opportunities nearby to hike, bird watch, and swim are major components of the quality of life at the assembly. Many people mention specific area hikes and destinations they routinely visit.
- The swimming pool, playground, and tennis courts are also big favorites.
- Other aspects noted but less frequently mentioned included the proximity to activities at Sewanee, the cafeteria, and area restaurants.

What MSSA could do to encourage more visits by family and friends

- Reducing the cost of housing gate fees and other fees was the most common suggestion.
- 15 of 74 respondents noted the need for more activities, particularly on the weekend, more off-season and a wider range of activities. Suggestions included bonfires, organized hiking schedule, and social events for young parents, particularly young mothers.
- There is a definite interest in extending the morning programming hours for young children.
- Other suggestions including using only golf carts, more Christian growth activities for youth, better access to rental information, and a look at some rental house opportunities.

The importance of youth programming

- Of the 82 respondents to this question more than a third felt that youth programming was perhaps the single most important aspect of the assembly and for many the primary reason for their attendance.
- Comments included that the youth program fosters leadership among young people, builds a love of the mountain and appreciation of the outdoors,

provides children with the chance to create lifelong friendships, and teaches them confidence and resilience.

- A number of respondents noted how important a good youth program is for the long term future of the assembly and the perpetuation of its membership.

Satisfaction with various aspects of the MSSA

- Areas rating the highest level of satisfaction included the quality of the housing, staff responsiveness and friendliness, staff management and performance, and the condition of common facilities grounds and services.
- Areas that respondents were least satisfied about where the summer season activities for adults and youth, and off-season activities.

Changes needed

- Just over half of respondents noted changes should be made to improve their MSSA experience.
- The three top areas needing change were the quality of housing, program offerings for the summer season, and facilities grounds and services.
- There was also some note of the need for improvements in costs, policies or rules, and staffing.

Quality of housing

- Common criticisms included cost of housing, need for upgrades to various houses, and lack of good maid service.
- Several respondents noted the need for more bed-and-breakfast accommodations, and easier, particularly online ways to find out about available housing options.

Condition of common facilities grounds and services

- A number of respondents had suggestions about the pool, extending the hours, keeping it cleaner and the area around it picked up, and quicker repair.
- Provide better supervision of children so that there will be less damage to racquetball nets, etc.
- Improve dining hall restrooms and have better handicapped accessibility in general.
- Dog should be prevented from running loose.

Summer season programming

- The most common suggestions seem to be to have more programming for young adults, people aged 25 to 45.
- There is a desire to see programming freshened up a bit from previous years.
- Provide more weekend activities particularly for children.

Cost of various services, fees, etc.

- 20 of 27 respondents noted that various fees and costs were too high. Particularly for families or short-term visitors.

- A number made specific suggestions as to how the pricing structure might be altered.

Policies and rules

- Revamp the renovation approval process.
- Some policies are overly restrictive.
- Provide better oversight of young people.
- Restrict the use of golf carts and require that dogs be on leashes.

Staffing

- Up-grade the quality of the rental housing staff, and youth staff.

Consideration for renting

- Just over one third of respondents have reported they considered renting a cottage at MSSA.
- Most respondents have rented additional space when needed for their family or friends' stay.

Consideration of acquiring a leasehold

- Just over one third of respondents reported they had considered the possibility of acquiring a leasehold.
- The cost of acquiring a leasehold, in particular the lack of a mortgage possibility is a detriment to those considering acquiring a leasehold.
- A number of respondents have adequate access to housing through family members and therefore are not interested in their own leasehold.

Renter Specific Survey Results

Consideration of Acquiring an MSSA Leasehold

- 35% of survey respondents reported they had considered exploring the possibility of acquiring a leasehold. 29 left written responses.
- Two were still considering the prospect. Others reported they were considering other second-home options, that the cost of acquiring and maintaining are too great, the cash purchase requirement is prohibitive, they live too far from Monteagle, and there are too many rules and regulations.

Satisfaction with various aspects of the MSSA

- Overall, respondents indicated little interest in on or off-season programming or activities.
- Respondents reported the highest level of satisfaction with staff responsiveness and friendliness, staff management and performance, the condition of common facilities and grounds, and the rental cottages themselves.
- Only slightly lesser satisfaction was noted for the rental reservations process, and rental policies.

- There was relatively high satisfaction with the dollar value of rental cost and fees yet 8% of respondents noted they were completely unsatisfied with this aspect.
- 73% reported an overall positive rental experience.

Areas Needing Change

- Two thirds of respondents noted there were some areas that could use improvement.
- Of the seven areas, the top four areas needing change were the quality or condition of the cottage itself, rental policies or practices, cost of various services and fees, and staffing.

Condition or quality of the cottage itself

- A number of comments were registered noting dissatisfaction with the cleanliness of the houses and the operating systems, appliances etc.
- Other comments dealt primarily with the age of the of the houses such as obsolete kitchens and baths, and general repair needs.

Programming offerings for summer season

- Only nine comments were received under this category, since most renters did not seem to be there in order to take part in activities. Comments suggested more offerings for little ones, more exercise options, better craft projects for the children, and a greater variety of activities for adults

Common facilities, grounds and services

- Only nine comments were received. Two in particular with regard to the pool closed for repairs.
- Other suggestions had to do with improved roads and signage, a desire for maid and catering services, and some adjustment of dining hall hours and offerings.

Cost of various services, fees, etc.

- 35 comments were registered in this category including nine who found costs acceptable.
- Mostly, respondents seem to react negatively to the array of various add on fees including the parking fee and parking space availability. Several mentioned high gate fees.

Governing structure or policies

- Most respondents noted no concerns but the relative few who did, noted too many or too harsh rules.

Staffing

- Most respondents noted no concerns. A few noted irregular staff quality.

Rental policies or practices

- This subject received more written responses than any other subject area
- Several respondents suggested being able to rent for less than seven days or to have some flexibility on what day the rental begins.
- Some respondents noted the rental process was difficult or inconsistent and prone to mistakes.

- Other comments suggested the ability to make reservations and pay online, and to have maid cleanup included in the rental.
- Only three of 38 respondents mentioned that rental costs or fees were too high.

Motivations for renting or ceasing to rent

- 68 respondents left written remarks about why they rent at MSSA or have ceased renting.
- The primary reasons given by respondents for renting are events at Sewanee or Sewanee traditional gathering times. Other frequently mentioned reasons include a family tradition of being there, and the particularly special atmosphere and feel of the Assembly.
- Only a very few respondents noted they would not be returning and generally this was either because of the bad rental experience or because their Sewanee connection was no longer in place

APPENDIX B: Public Forum #1 Input June 14, 2013*

What do you love the most about the Monteagle Sunday School Assembly?

- Community
- Renewing friendships, traditions, feeling close to family members that are no longer with us
- Family feeling and intergenerational opportunities
- Sense of peace when entering the gates
- The place, the pace, the people
- Platform! Friends, architecture
- Community – slowing down
- Generational tradition
- Tradition, slower pace of life, reconnect with family and self, community, multi-generational friendships
- The best – not perfect but we need to stay as we are if possible
- Traditions- lectures, dining Hall, twilight prayers, movies, games
- A sense of belonging to its history, the fact that my family loves it
- A place for all ages
- Friendships, Christian growth, family
- Religious emphasis and foundation
- Bible programs and study
- Sense of belonging
- Caring environment for all of us
- The people
- The intergenerational nature of the assembly
- Youth program
- Christian nature
- Traditions
- Generations of family and friends
- Imperfect mess - we are not Seaside!
- The love and caring for each other and nurturing of children
- Family and friends
- Laid back and family atmosphere
- Being able to let kids run relatively free without worry
- Natural setting
- Decades long friendships
- Family-friendly – multiple generations can be here together and all enjoying, part of what makes Monteagle our family hub
- Preservation architecture
- The changes in children as they experience “safe world” here
- Family, nature, church, grandchildren
- Faith
- Generational freedom, Bible study, diverse activities, friendliness

What would you like to see changed or different at the Monteagle Sunday School Assembly?

- Special programs and speakers more like Chautauqua New York
- Very closed group of leaders and committee members, need to really look at technology based ways to involve all those living 250 miles away
- Expand participation on committees
- Do not change lease transfer process
- Make it more attractive to become a leaseholder-allow mortgages, reduce transfer fees if trading from one house to another in the assembly
- Ease of cottage purchases
- Annual headliner event
- More events for community outside
- Off-season events
- Be proud of ourselves and talk ourselves up to outsiders
- Smaller board and larger authority vested in staff
- Chapel expanded-AC/heat and restrooms – most important building
- Twilight prayers and Sunday service more current
- Better housing services – so many changes since MSSA took over
- Youth/children's program – more spiritual emphasis
- Tickets for guests too expensive – would have more people
- Mortgage options
- Fund the platform so there's a headliner every week
- Include some off season programs
- More efficient rental program
- Mortgages
- Wider variety of platforms speakers
- Better programs considering all age groups
- Recycling program
- Programs focused on child rearing and or raising teenagers
- Childcare if attending lectures
- Community service opportunities for our teenagers
- Agree that each of us can/will tell the world/church groups, garden clubs, Junior Leagues, etc. about opportunities to vacation and own here – we need a community, a script, a DVD, to take action
- Have different categories of membership beyond homeownership
- Recycling!
- Not much. I fear we may be becoming too institutionalized and corporate
- Financing options on housing to bring/allow family and friends to become members
- Active recruitment, PR for others who could then be members and house owners
- Challenging speakers on hot issues
- More connections with people who are renters so they feel welcome
- Figure out mortgages
- Need mortgage to buy
- Cloud Internet

- Bring back some of the plays, concerts that were here in the 80s. Have really good well-known speakers more often
- Rental needs to be rethought – 15% instead of 20% to MSSA, 10% for sale
- Childcare for 0-2 and programs for younger moms
- Small focus groups to become better acquainted with new members, neighborhood picnics
- Mortgages! Move affordable housing – more ways to have more people afford to purchase a house
- More "edgy" lectures
- Would like to have more diversity in our membership
- Would like some sort of small groups that engage in serious, thoughtful discussion – maybe twice a summer
- A better Internet site – we have repeatedly in the last 24 months had to update our pictures
- Even if we are a non-profit – we can have unrelated businesses we promote and make money on and pay taxes for
- I want the MSSA that I've enjoyed all my life to continue as is. I hope we don't lose the uniqueness of what we have.
- More welcoming to renters
- Mortgages
- More money for platform
- Almost 10% of houses on the market – need to change that – homeowners are members, no homeowners, no participants
- Create more opportunities for community service – especially for our youth
- Provide safe way for staff and crew to report concerns without fear of retaliation
- Increased transparency and committee decisions
- Have scheduled activities on weekends
- Acknowledge there is a perception – reality of racism in our exclusivity
- Get over our fear of losing our not-for-profit status. I feel this is a smokescreen to not change, reach out to new people and communities.
- Have an articulated, planned and acted on commitment to tell people about MSSA
- Welcoming to new families
- Higher expectations of youth staff as a whole, safety of youth program
- Reduce the size of the board of directors
- Program elements that reach all ages
- Dinner or lunch group rotation so we can meet others
- Upgrade youth programs and use some character lessons
- Have a theme or flow for the season

What would you like to see preserved or go unchanged at the Monteagle Sunday School Assembly?

- Sense of community
- Respect for nature
- Quiet hour!
- 9-square at the auditorium
- Current number of lots
- Natural beauty
- Pace – nature
- Sense of community
- Preserve nature and sense of history
- Preserve ability for children to roam free
- Quiet time!
- Natural beauty
- Summer season
- Traditions!
- Role of committees – lifeblood of assembly
- Architectural integrity
- Preserve how it feels to have stepped back in time
- Satisfaction for all ages
- Leasehold transfer process
- Speed limit
- Public buildings – open space – nature trails
- Community feeling of caring for God's earth and each other
- Feeling of retreat
- Meaningful services and programs
- Familiarity and care of members for each other
- No mortgages, do not involve endowment with loans, no expansion of leaseholds (facilities do not support a higher membership)
- Our status as a church both for spiritual reasons and tax ones
- Generations
- Discussions
- Church charter
- The safety I feel for my children not having to lock my doors
- Member participation on committees
- Good programs and lectures for all ages
- Everything

In five words or less, what is the Monteagle Sunday School Assembly to you?

- The way you feel as you enter the gate!
- Multi-generational family camp
- Having family together
- Family, friends, nature, generations
- Community, retreat, renewal
- Family, community, continuity, Christian upbringing, traditional values
- Safe place to grow/relax
- Family gathering spot
- Family, friends, faith renewal, generations
- Generations of family, friends
- Family, youth, multi generations, friends, faith
- Generation connection
- Family, friends, serenity, joy, legacy for my children
- Community, downtime, restoration
- Connection with Miss Bessie
- Family, rest, getaway – escape, camaraderie, nature
- Reset button for hectic lives
- Family comfortable place
- Traditions, family, friends
- Spiritual retreat, grounds, renewal, peace, re-energizing

*Additional input received on boards through July 13 is incorporated above.

APPENDIX C: Public Forum #2 Input July 13, 2013

What should the Assembly seek to accomplish in the next five years?

- I would like to see more funds for platforms speakers
- Develop dollars so that more important summer program may be developed
- increase attendance at twilight prayers
- More exciting temporary speakers and music
- In five years, every seat will be taken in Chapel for platforms speakers
- Youth program to be so strong and so well conducted it continues to draw and increase numbers who always want to come back – as teams, adults, members and cottage owners
- A youth program that allows parents to feel confident their children are being welcomed, treated with kindness, playing in safety
- Have board members participate more in twilight prayers and other spiritual aspects of the program
- Have board members attend more programs
- Encourage committee participation and involvement – Assembly works because of committees
- Bringing in new blood – a way to reach out and get the word out to others about the Assembly
- One free weekend during the season to write friends and to visit – stagger numbers by alphabet
- Boost regional visibility - Nashville, Atlanta, Chattanooga to increase visitors, renters and owners
- Have small videos by children through middle age and older on Facebook to show what Monteagle is
- Emphasize Monteagle as retreat center for individuals and groups off-season and in season
- Create a plan to market appropriate aspects of assembly life more each year
- A safer community on the roads for all ages – bicycles, cars, golf carts
- Rainwater catchment and storage on public buildings
- Recycling
- Truly recognize the architectural assets of the assembly
- Try to get natural gas
- Maintain church status
- Settle tax situation – church? So we won't be surprised or off-balance.
- Totally revise renter program – 20% commission if renter is found by office, 1% commission if found by owner, zero commission owner renting to owner
- To not price itself out of existence
- Offer affordable housing for rental or purchase
- Housing turnover – facilitate sales
- Find an easier way for leaseholders to transfer ownership

- Plan ways to make purchasing Assembly property more affordable – by trial and error if needed
- A way to make cottage transfers easier – so we don't have so many on the market
- Tighten up on expenses so younger families can afford
- Make sure financing is understood by all who want to buy cottage
- Maintain the current character as its base while modernizing its thoughts
- Maintain our history and traditions – we are unique
- Continue providing a place of peace and rest in community while adapting to the 21st century
- Continue efforts to build community amongst members and guests
- Outreach for our own assembly friends who need it
- Continue many things as they are – church status – caucus system – focus on youth and family
- Continue to provide a safe environment for our children and grandchildren
- Continued excellent programs for all ages
- Continue to promote our endowment to continue programs of great quality
- Maintain our uniqueness
- Focus on spiritual contemplation and discipline
- Upgrade safety and security in kids program
- Find ways to improve on the rich history in youth programs, Christian programs
- Add another platform position to planning and focus on upgrading religious program for all ages
- Follow-up extended discussions after lectures – on people's porches for open discussion
- Look at assembly governance and move us more toward a BOT that is made up of those that deserve to serve rather than just a caucus rep-do away with caucuses
- Reduce size of the board

APPENDIX D: SWOT Analysis July 20, 2013

Strengths

- Location – the location – location (12)
- Christian principles and focus (12)
- Quality of life (12)
- Passion and love of members and families – being best (9)
- Strong staff and board leadership (4)
- Tradition – history (3)
- Passion of full community (2)
- Manager – management (1)
- Diverse talent (1)
- Financial management (1)
- Physical place
- Brainpower of the people
- God
- Caring, talented, volunteer oriented community
- Strong endowment
- Predictability of the experience
- Available resources among members
- Educational resources

Weaknesses

- Expense of leaseholds (14)
- Desire to remain the same – fear of change (9)
- Not diverse (9)
- Lack of consistency in governance (7)
- Aging demographic (7)
- 80 – 20 rule (6)
- Don't tell the story well enough (3)
- Underutilized committee system (2)
- We are not our own philanthropic priority (2)
- Weak appeal to the younger generation (1)
- Sense of not being heard (1)
- Small budget (1)
- Board structure and election process (1)
- Lack of cohesive, common goals
- Reluctance to participate
- Lack of year-round continuity
- Allowing preconceived ideas to limit us
- Distance traveled and only short-term residents
- Communication network
- Gossip – lack of trust
- Not enough big idea programming

Opportunities

- Location and natural environment (15)
- University of the South and other potential collaborators (10)
- Untapped marketing opportunities (9)
- Technology for communicating (5)
- Need for respite (3)
- Social media (3)
- Golf and Mountain Goat Trail (3)
- Heritage tourism (2)
- Change of pace – history (1)
- Nearby target residential communities (1)
- State of the world
- ideas festivals and Elderhostels
- Community offerings
- Higher education in the region

Threats

- Busy lives – youth sports and activities, school calendar (16)
- Not cost competitive for a family vacation (15)
- Overvalued houses – relationship to the external real estate market (14)
- Loss of tax exempt status as a church (3)
- Lack of vision (3)
- Declining interest in religion (2)
- Other area places to stay (2)
- Technology (1)
- Ease of travel to other places (1)
- Lack of knowledge of MSSA heritage-history of new members (1)
- National economy
- Cost of travel
- City of Monteagle
- No body of water

APPENDIX E: Long Range Planning Committee, Strategic Planning Task Force, and Goal Review

TEAMS

Strategic Planning Task Force

Kent Ballow
Bill Cox
Henry Crais
Doug Ferris
Ginny Gordon
Lisa Hammett
Jim Humphries
Jenny Jervis
Mary Susan Kennedy
Scott Parrish
Margaret Rixham
Don Rollins
Ann Shayne
Stephanie Smith
Sue Spickard
Sally Stevens
Robin Thompson
Mary Balfour Van Zandt
Paula Walker
Anne Worthen

Long Range Planning Committee

Kent Ballow, chair
Henry Crais
Lephiew Dennington, Jr.
Doug Ferris
Amanda Moody
David Pilcher
Ann Shayne
Paula Walker
Britton Watson

Pat Wildman, ex-officio
Scott Parrish, ex-officio

Goal Review TEAMS

TEAM 1

Frannie Smith-Captain
Mary Clayton Saunders
Robin Thompson
Sue Spickard
Margaret Rixham
Mary Ellen Lovell
Frannie Corzine
Blythe Bowman
Ginny Gordon
Sallie Stroud
Brooke Ballenger

TEAM 2

Susan Acker-Captain
Mary Balfour Van Zandt
Anne Worthen
Katie Trahan
Maggie Baxley
Becky Nelson
Louise Manzella
Ashley Baine
Cullen Hornaday
Anne Williams

TEAM 3

Paula Kunkel-Captain
Agnes Short
Hays Haney
Delk Kennedy
Ellen More

Overton Thompson
Bricke Murfree
Keith Barton

TEAM 4

Jim Humphreys-Captain
Henry Crais
Pat Wildman
Dede Clements
Norman Blake
Gregory Watson
Bob Monfore
Barry Moody

TEAM 5

Joel McAlister-Captain
Sallie Stevens
Bill Cox
Bill Flatley
Lanier Frank
Greg Maloof
Jim Uden, Jr
Lisa Eyster

TEAM 6

Ann Ewing-Captain
Lisa Hammett
Amanda Moody
Marty Buffington
Diane Black
Karen Dismukes Cooper
Perian Strang
Don Rollins
Leslie Neely
Clark Hudgins

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