

Morristown Unitarian Fellowship DRAFT Five Year Strategic Plan

VISION STATEMENT

We are a dynamic congregation, growing in spirit, community, numbers, and impact seeking to transform ourselves and the world beyond us.

Priority Area: Leadership /Governance

Goal Statement:

Create administrative, program and governance infrastructures that intentionally support the mission of a growing “mid-sized” congregation.

Recommendations:

- 1. Structure the Board to manage and support the assets of the organization.**
 - a. Evaluate the need for additional board members/positions, including:**
 - i. Immediate Past President to serve as ex-officio member**
 - ii. Board Member responsible for Volunteer Development**
 - iii. Other positions as identified to support the strategic plan**
 - b. Evaluate the length of terms for each of the positions**
 - c. Create a leadership development curriculum for board members with respect to their various responsibilities**
 - i. Include a mentoring role for the immediate past Board President**
 - ii. Utilize denominational resources**
- 2. Define the role of the Networks in the overall infrastructure toward the ends of communication and strategic planning.**
 - a. Establish Annual operational goals consistent with the strategic plan**
 - b. Recruit Liaisons from every committee until we have the full complement**
 - c. Formalize the communication system between the Network and Committees**
 - d. Formalize the communication system between the Network and Board**

- 3. Build systematic means of evaluating the ways in which our governance structures support or hinder our strategic goals.**
 - a. Newer members and long term members are represented at every level of leadership (committees, taskforces, councils, board, networks, COM)**
 - b. Annual Spring review of how effective we are at implementing goals at every level of leadership, including how we are doing at making decisions at the right level (minister and board, as well as, staff, congregation, networks)**

- 4. Implement a Staffing Plan for better supported ministries, administration and facilities management that allows for growth of the congregation and accomplishment of the strategic goals.**
 - a. Identify necessary positions and create written job descriptions, role distinctions and responsibilities**
 - b. Hire a Facilities Manager responsible for rentals and building management**
 - c. Designate a Finances Coordinator**
 - d. Hire an Office Assistant**
 - e. Hire a Ministerial Assistant who works on relationship management and calendaring, membership integration and tracking, Sunday morning coordination, and support for major program initiatives of the congregation**
 - f. Increase RE Assistant hours**

- 5. Implement a Volunteer Recruitment, Leadership Development and Evaluation Plan.**
 - a. Identify a Volunteer Coordinator(s)**
 - b. Create a coordinated annual volunteer plan for the various ministries and programs of the fellowship**
 - c. Create a leadership development plan for lead volunteers to help them acquire the skills necessary for their new volunteer positions**
 - d. Enact term limits at all levels of leadership, excepted where there have been intentional conversations with the minister and/or the board about a longer term position**

- e. **Implement a structure of evaluation and feedback for alignment with the strategic direction of the congregation and opportunities for personal growth in that area of ministry**
6. **Grow our members' level of financial commitment and make stewardship a twelve month priority.**
- a. **Set annual financial targets to match the strategic planning goals**
 - b. **Educate members and friends around the various levels of giving in the congregation and foster movement to the next level of giving**
 - i. **Report periodically on numbers of fair share givers; percent of large givers; 5 year pledging trends**
 - c. **Hire a consultant to assess the likely levels of giving to support a capital campaign**
 - d. **Implement a Capital Campaign**

Priority Area: Sharing Our Values in the World Community

Goal Statement:

Expand both the congregation's outreach activities and advocacy by focusing our social justice initiatives. Achieve recognition in the larger community as an agent for change and a liberal religious voice.

Recommendations:

- 1. Appoint a Task Force to develop a comprehensive Social Justice Plan to be presented for adoption by the Board and Congregation.**
 - a. Set intentional criteria for the Social Justice Plan that supports the vision and goals of the Strategic Plan, including education and social change**
 - b. Select delegates from the congregation who represent the demographics and differing life experiences of the MUF community that include:**
 - i. Two representatives from Social Justice Council**
 - ii. Parents participating in Religious Education**
 - iii. Senior High youth**
 - iv. Board Member**
 - v. Minister**
 - vi. Individuals who are single, married, working, retired, etc.**
 - c. Structure the Social Justice Plan to include one signature Social Justice project per year; clear goals and priorities supporting the project; and a series of practical tasks that will permit numerous volunteers to experience avenues for participation that don't include being on a committee**
- 2. Intentionally coordinate activities that are aligned with the Social Justice Plan and strategic goals and allow for intergenerational ownership.**
 - a. Define the roles for leadership and staff**
 - b. Develop and implement a communication plan that defines means (traditional and innovative), frequency, roles and responsibilities**
 - c. Develop, communicate and implement a Volunteer Plan, in coordination with the Networks and Membership Committee, to support the Social Justice Plan activities and to institutionalize a practice of shared volunteerism**

- 3. Evaluate and publish results of outreach and advocacy activities.**
 - a. Document funds utilized which include o/e budget, as well as aggregate giving both internal and external**
 - b. Include assessment of non cash benefits (e.g. volunteer hours, in-kind donations)**
 - c. Report and celebrate outcomes achieved (e.g. houses built, meals served, etc.)**

- 4. Expand our model of collaboration so that we may deepen our relationship with non-profit organizations and other UU congregations to increase the impact of sharing our values.**
 - a. Identify non-profits within the community with whom we will partner**
 - b. Work with Unitarian Universalist Legislative Ministry of NJ (UULMNJ) toward an increased voice in legislative advocacy**
 - c. Identify areas of partnership with the Unitarian Universalist United Nations Office (UU-UNO)**

Priority Area: Life Span Religious Education

Goal Statement:

Offer dynamic programs for all ages that will deepen and transform lives through living out our Unitarian Universalist faith.

Recommendations:

- 1. Develop programming that supports connections and community as membership grows.**
 - a. Small Group Ministries (Covenant Circles)**
 - b. Core Curriculum for Adult RE**
 - c. Multigenerational Programming**
 - d. LifeSpan Programming that will address the needs of different generations such as programming for the elderly, programming for the middle age years when children bridge out of our program, and programming for young adults**
 - e. Support the growth and success of our Religious Education Program and continue to monitor and evaluate the program as our needs change**
- 2. Fully support the Religious Education Program with appropriate infrastructure improvements, including immediate additions to staffing (20 Hours for an RE Coordinator of children's programming).**
 - a. Worship space for Chalice Chapel and group activities**
 - b. Clean functional 2nd floor kitchen**
 - c. Safe fenced-in playground area for children**
 - d. Safety issues addressed such as a new two-way swing gate for the second floor spiral stairs**
- 3. Implement a Small Group Ministry covenant circle for teachers to support their ministry to our children and youth.**
- 4. Provide a second service program for 3 through 6 year olds (Preschool/Kindergarten) and a grades 1 – 6 Small Group Ministry model or Spirit Play model.**

- 5. Continue to develop an excellent Cooperative Sunday School model where our parents are expected to teach and want to teach.**
 - a. Provide good orientations and trainings including discipline training**
 - b. Recruit members of our congregation who do not have children in the program**
- 6. Leverage technology to present LifeSpan Religious Education Programming.**
 - a. Go wireless so that teachers, facilitators, and committee members can use You-Tube and access other websites and blogs that will enhance communication**
 - b. Use software such as Constant Contact to enhance the way we publicize our events**
 - c. Invest in a flat-screen TV for use in the Nursery for our parents to listen and watch the service**
 - d. Invest in a flat-screen TV to publicize all our LifeSpan RE Programming, meetings, and fundraising events**
 - e. All congregation calendar that our congregational leaders can access for better scheduling/calendaring of events**
- 7. Create opportunities for shared programming with community organizations and congregations including Unitarian Universalist congregations.**
 - a. Meet outside our congregational walls to attract potential new members**
 - b. Meet and greet our UU neighboring congregations with shared programming such as OWL**

Priority Area: Community, Caring Connections

Goal Statement:

Use and adapt our palpable sense of community to increase membership growth and integrate new members.

Recommendations:

- 1. Develop and implement a Membership Plan.**
 - a. Evaluate the needs of the demographic population (“likely UUs” of all ages) and include steps toward reaching these potential new members with an eye toward diversity and openness**
 - b. Set membership goals and incremental benchmarks**
 - c. Include outreach and visibility strategies and doorways for newcomers**
 - d. Establish a structured roadmap to membership for newcomers**
 - i. Describe the experience we wish to create**
 - ii. Include newcomers in defining desirable welcoming techniques**
 - iii. Role of minister and her designee**
 - iv. Every committee to recruit one newcomer per year**
 - e. Document how technology will be used for communication; integration of new members; and tracking of members and activities**
 - f. Identify leadership, staff and volunteer roles in achieving stated membership goals across the organization**
- 2. As membership grows, intentionally develop programming that supports and strengthens the sense of community by promoting personal connections and meaningful involvement in our religious community.**
 - a. Develop adult and youth religious education opportunities with these intended goals**
 - b. Include methods, systems and structures to manage calendar of activities and to continuously communicate and direct both members and newcomers to these opportunities**
 - i. Coordinate and integrate activities across the organization using the Board and Networks**
 - ii. Utilize technology, the pulpit, and monthly updates**

Priority Area: Spiritual Growth and Exploration

Goal Statement:

Create opportunities for worship, spiritual practices, and other growth experiences that offer inspiration and personal transformation.

Recommendations:

- 1. Create multiple pathways that allow for spiritual growth and transformation which enable our members to encounter the sacred, be exposed to pluralist influences, explore the “Big Questions” and spiritual concerns, and express our faith through diverse means and gifts.**
 - a. In Worship**
 - i. Building on our current Sunday Services Associates program, develop a team of worship assistants who work alongside of the minister to tend the spiritual lives of our congregants and develop their own worship leadership (aesthetics, liturgy, etc.)**
 - ii. Include high quality theater/dance and movement to bring certain themes to life in services 4 – 8 times per year**
 - iii. Honor and continue annual tradition of preacher/teacher from another faith tradition**
 - b. In Social Justice**
 - i. Offer opportunities for spiritual/theological reflection on the meaning of the current Social Justice initiatives (service, advocacy, education) before the initiative commences and following its completion. (MODEL: Reflection Before – leads to deeper Practice; Reflection After – leads to growth, deepening and learning to carry with you for the next time)**
 - c. In Lifespan Faith Development**
 - i. Mind, body, spirit**
 - d. In Practice Groups**
 - i. Offer four types of practice groups per year with an eye toward rotation (yoga, meditation, nonviolent communication, hiking, prayer, journaling, etc.)**
 - ii. Covenant Circles**
 - e. In Retreats**
 - i. Annual congregation-wide retreat**

2. Leverage Web and Technology opportunities.

- a. Develop a technology team that assists with integration and innovation of technology in our Worship in our Worship and Religious Education classes.**
- b. Develop a web presence that includes more intention about the spiritual growth dimension of our congregation, including:**
 - i. A robust explanation of Unitarian Universalism**
 - ii. High quality video of a selection of services**
 - iii. Blogs/Conversations on spiritual topics**
 - iv. Opportunities for families and individuals to do follow up**
 - v. An area for sharing Milestones and Passages**

3. Cultivate Identity as a Community of Spiritual Learners and Teachers.

- a. Embrace a role of helping to train ministers for service in the larger Association by offering and internship at least twice in five years (with supervision by the Minister and volunteer Internship Committee)**
- b. Create more opportunities for members or guests with high quality and inspiring talents (dance, music, art, film-making, etc.) to share their gifts in worship, classes and events, as well as, for mentoring others to cultivate these gifts**

Priority Area: Facilities

Goal Statement:

Establish and maintain a spiritual home that supports our mission and vision; enables our growth initiatives (including adequate space for worship, life span religious education, meetings, functions and administration); is welcoming, safe and well-maintained.

Process Objective & General Description:

Strategic Planning recommends a broadly participative and dynamic process to develop a solution to the question: How will our community create a home that will support the continued health and wellbeing of our congregation well into our future? Together we must find a solution that addresses space requirements, cost constraints, ongoing maintenance of our current facility and funding options, and should be selected following considered evaluation of the three options presented to the Congregation.

Over the first year of the Strategic Plan implementation, the congregation will engage in an open process facilitated by an expanded Facilities Team established to work with the Strategic Planning Task Force to research and explore each of the three potential facilities options, as well as, a fourth area for identifying potential grants and alternate funding options. Each of the three option areas will be assigned to an Option Sub-Team that will work with a Facilitator selected by the Nominating Committee and will be supported by the Strategic Planning Task Force. The Option Sub-teams will be able to access professional advice from an architect and real estate broker selected to support the process. The teams will be structured and organized to promote cross-fertilization among the sub-teams; the sub-teams will work individually as they develop creative solutions, and collaboratively as they inform each other of key data which may assist and/or identify challenges for any of the option solutions. Following adequate time to work out the most creative solutions, the Facilities Team will present its findings to the Congregation.

Target Timeline and Process:

Summer, 2010

- Three Facilitators are identified by the Nominating Committee to oversee the study and development of how the congregation might pursue each of the three Facilities Options presented to the congregation:
 - Stay, Renovate/Expand
 - Buy Raw Land and Build
 - Buy Existing Facility and Remodel

- **A Fourth Subcommittee is developed by the Board and Strategic Planning Task Force to Explore and Identify Funding Opportunities**
- **Strategic Planning Task Force (SPTF) gathers resources for the Facilities Team, documents the criteria which must be met by any facilities option, finalizes budget with the Board, and identifies professionals to be used by the research sub-teams for their analysis of the options.**

End of September, 2010 – January, 2011

- **Kick off the Community Facilities Process; convene Facilities Team and distribute orientation packages of key background information.**
- **Facilities Team conducts research and brainstorms solutions for the three options.**
- **Sub-team Facilitators meet regularly with a member of Strategic Planning with updates.**
- **Strategic Planning shares team progress, stumbling blocks and ideas with Sub-team Facilitators and encourages broad collaboration.**
- **Sub-teams will have access to documentation and professionals utilizing a small budget (to be managed by the SPTF representative) to be used to complete their research.**
- **Sub-team 4 shares potential grant information with other three teams.**

January, 2011

- **Sub-teams present their findings and recommendations to the Board, the Minister, Strategic Planning Task Force and the Architect. Up to three alternative scenarios may be presented by each Team.**
- **Review criteria including how well each solution addresses space requirements, cost constraints, ongoing maintenance of our current facility and funding options.**
- **Regroup to answer questions or make adjustments based on feedback from the Board, Minister, SPTF and Architect.**

February – June, 2011

- **The Facilities Team presents the findings and recommendations of each sub-team to the full Congregation and gets feedback from membership through facilitated conversations.**
- **Regroup to answer questions and make adjustments based on feedback from the Congregation.**
- **Board, Minister and SPTF review all feedback and identify the best recommendation for the Congregation.**
- **Board and Minister present selected Facilities recommendation to the Congregation.**

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