

Imagine OUR FUTURE  
Five year strategic plan

Congregational Strategic Plan  
Development  
March 21, 2010

# Purpose of Today's Session

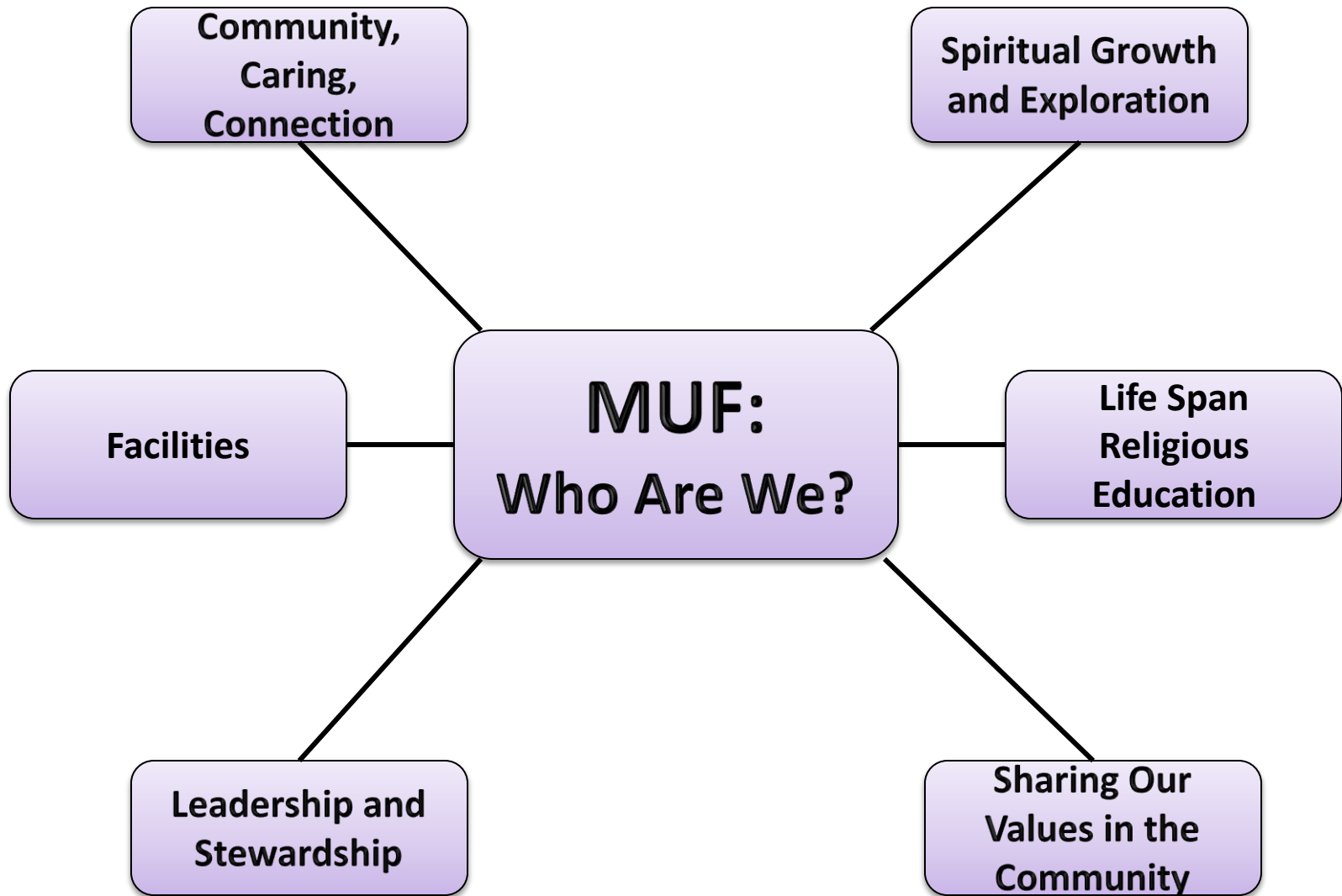
To flesh out and  
develop priorities  
for the Strategic Plan

# Agenda 1:00 pm to 4:00 pm

- Introduction
- Check-in
- Description of Draft Plan
- Break out Group I
- Brief break
- Break out Group II
- Plenary
- Closing

# Norms

- Listen, let finish
- Value differences, look for differences
- No one of us is as smart as all of us
- Be informal
- No target practice
- Be creative and have fun!



# Priority Areas

- Community, Caring, Connections
  - Connections
  - Inclusivity, Diversity
  - Membership
  - Pastoral Care
- Leadership and Governance
  - Mission and Vision
  - Leadership and Volunteers
  - Organizational Structure and Policies
  - Professional Staff
  - Stewardship and Finances

# Priority Areas (continued)

- Life Span Religious Education
  - Adult RE and Programs
  - Children's RE and Programs
  - OWL
- Sharing our Values in the Community
  - Community Voice
  - Denominational Affairs
  - Environmental Responsibility
  - Social Action
  - Building Use by Community

# Priority Areas (Concluded)

- Spiritual Growth and Exploration
  - Personal Growth
  - Right Relationships
  - Worship
  - Music, Art, Creativity
  - Morale
- Facilities
  - Grounds
  - Location
  - Space
  - Accessibility, Parking
  - Distraction from Mission
  - Safety, Condition

# Five Year Strategic Plan

- Vision Statement
- Goal Statements and Recommendations for six priority areas (theme categories)
- Focus on Five (5) Priority Areas today
- Separate meeting on Facilities  
Saturday, April 24<sup>th</sup> 2:00 – 4:00 p.m.

# VISION STATEMENT

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

# Leadership/Governance

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

## Recommendations:

- ❖ Structure the Board to manage and support the mission and assets of the organization, e.g. a board member responsible for volunteers.
- ❖ Staff for Growth – Immediately increase staffing in program and administrative areas to support all priority areas of the strategic plan, including: a ministerial assistant (20 hours); add +10 hours to the RE assistant; add +10 hours to the office assistant.

# Leadership/Governance cont'd

- ❖ Create and share written Job Descriptions, Role Definitions and Responsibilities for all paid staff and volunteer leadership positions.
  
- ❖ Build a continuous pipeline intended to assure organizational stability for volunteers and leaders including:
  - a culture where volunteerism is the norm, not the exception
  - a leadership development plan
  - continuous support , coaching and appreciation for leaders and volunteers
  - term limits for leadership positions
  - a clear role for the Board President following his/her term

# Leadership/Governance cont'd

- ❖ Revisit the relationship of the Networks to the overall infrastructure. Restructure and/or formalize the expectations to support the strategic plan goals.
- ❖ In anticipation of continuous growth, reinforce through infrastructure development individual representation through a delegated authority structure. Encourage a culture shift that supports a larger organization with continuous evaluation for necessary change.
- ❖ Grow the pledge base as an absolute number and shift distribution of pledge income to rely less on a few large givers. Distribute visual depiction of demographics of giving, and conduct open conversations with the congregation about expected giving.

# Sharing Our Values in the Larger 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:

- ❖ Develop and adopt a comprehensive Social Justice Plan that helps focus and direct our activities for increased impact.

# Sharing Our Values in the Larger Community (cont'd)

- ❖ Conduct one signature social justice project per year for which Morristown Unitarian Fellowship is known community wide and that builds our congregation and our spiritual mission.
- ❖ Enhance leadership and staff participation in the coordination of activities, funding and efforts toward the social justice plan.
- ❖ Integrate both youth and adult volunteers in all activities.

# Sharing Our Values in the Larger Community (cont'd)

- ❖ Develop, tabulate and report aggregate external giving and develop bench mark reporting for the non-cash aspects of our social outreach efforts. Publicize results internally and externally.
- ❖ Support UU Legislative Ministry of NJ and increase our participation at all levels of our denomination.

# Life Span Religious Education

**GOAL STATEMENT:** Offer dynamic programs for all ages that deepen understanding of our UU teachings and how they transform our lives.

## Recommendations:

- ❖ Develop programming that supports connections and community as membership numbers grow:
  - Small group ministries (e.g. covenant circles)
  - Core curriculum for adult RE
  - Multi-generational programs
  - Support growth of the already successful children and youth RE

# Life Span Religious Education (cont'd)

- ❖ Develop a Family Ministry that creates a sense of community, meets the needs of grandparents, parents and children and addresses factors which cause families to leave after children “age out” of the RE program.
- ❖ Fully support the RE program with appropriate infrastructure improvements, including immediate additions to staffing (+10 hours RE assistant).
- ❖ Support our volunteer teachers by celebrating and supporting teaching as a ministry, not a chore. Continue to assure an appropriate pipeline of instructors for the RE program.

# Life Span Religious Education (cont'd)

- ❖ Introduce a limited enrollment Youth RE session at 11:00 a.m. to provide families with choices and help balance attendance between services.  
Note: The format of the 11:00 program will not necessarily mirror the 9:00 a.m. program.
- ❖ Leverage technology to present Life Span RE programming, e.g. blogs, various video technologies, “You Tube”, etc.
- ❖ Team more aggressively with other organizations in the community to offer and share programming, and/or offer programming in community centers to spread our message and to attract potential new members.

# Community Caring Connections

**GOAL STATEMENT:** Use and adapt our palpable sense of community to encourage membership growth and integrate new members.

## Recommendations:

- ❖ Become intentional in our growth objectives
  - Evaluate and adopt staffing and technology needs to support membership growth.
  - Develop a structured roadmap to membership for newcomers.
  - Enhance our visibility in the community and create “doorways” that encourage newcomers to visit us.
  - Evaluate the needs of the demographic populations from which we might draw new members (e.g. “gap” young adult, minority, and baby boomer populations). Execute a plan to meet these needs and recruit more broad demographics.

# Community Caring Connections (cont'd)

- ❖ Focus efforts and education on a culture shift toward broad lay “ownership” of a welcoming ministry.
  - Assess and develop coordination between staff and volunteers in all areas of welcoming and retaining newcomers: communication, tracking, involvement, outreach, etc.
  
- ❖ As our membership grows, develop programming that supports and strengthens the sense of community by promoting personal connections and meaningful involvement in our religious community.
  - Include methods, systems and structures to communicate and direct both members and newcomers to these activities.
  - Balance needs of the individual with needs of the whole.

# Community Caring Connections (cont'd)

- ❖ Live our “Right Relationship” values in all of our community and interpersonal interactions. Enhance the visibility of the Committee on Ministry and promote continuous feedback to the membership on the achievement of our aspirations.
  - Confront spoken and unspoken attitudes (e.g. antipathy toward certain political affiliation) that limit growth and diversity.

# Spiritual Growth and Exploration

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

## Recommendations:

- ❖ Create different paths to spiritual transformation which enable our members to:
  - Encounter the sacred
  - Be exposed to pluralist influences (e.g. the world's religions, stories, theologies, humanism, science, arts and philosophy, etc.)
  - Explore the “Big Questions” and spiritual concerns (e.g. mortality, meaningful living, hope, forgiveness, spiritual underpinnings of justice, etc.)
  - Express our faith through diverse means and gifts (e.g. spoken word, music and other arts, embodied practice, teaching, social justice, covenant circles, etc.)

# Spiritual Growth and Exploration (cont'd)

- ❖ Develop a technology team that assists with integration and innovation of technology in our worship and religious education classes.
  
- ❖ Develop a web presence that includes more intention about the spiritual growth dimension of our congregation, including:
  - A robust explanation of Unitarian Universalism
  - High quality video of a selection of our services
  - Blogs/Conversations on spiritual topics
  - Opportunities for families and individuals to do follow up work on the themes raised on Sunday morning
  - A restricted area for sharing Milestones and Passages

# Spiritual Growth and Exploration (cont'd)

- ❖ Create more opportunities for members or guests with high quality and inspiring talents (dance, music, art, film-making, etc.) to share their gifts in our worship, classes and events, as well as, for mentoring others to cultivate these gifts.
- ❖ Become a teaching congregation and seek to hire a ministerial intern most years. Develop an internship committee.
- ❖ Develop spiritual practice and exploration opportunities in our lifespan offerings, including prayer, yoga, meditation, hiking and journaling.

# Choose Two Priority Areas

Leadership/Governance – Meeting Room

Sharing our Values in the Larger Community – Terrace Room

Life Span Religious Education – Room 204

Community, Caring Connections – Library

Spiritual Growth and Exploration – Meeting Room

# Next Steps

- Congregational Facilities Discussion:  
Saturday, April 24<sup>th</sup>                      2:00 – 4:00 p.m.
  
- Budget Implications/Board Review
  
- Congregational Meeting – June, 2010
  
- Talk to Members of Strategic Planning Task Force (SPTF):
  - Karen Dinsmore, Co-chair      Norman Ng, Co-chair
  - Steve Kreha                              Steve Parker
  - Kelly Schnur                              Tanya Van Order
  - Beth Wilson                              Gary Kunz, Ex Officio
  - Lisa Schmitt, Ex Officio              Alison Miller, Ex Officio