

Fox Valley Unitarian Universalist Fellowship

5-Year Plan

Adopted June 2013

Background

In May 2010 the Governing Board adopted a new planning model that calls for the Fellowship to regularly engage in a 5-year planning cycle. Specific elements of the planning model need to occur each year of the cycle, including the creation of a new plan every five years.

The first year of the new planning cycle occurred during the Fellowship's 2011-2012 fiscal year and resulted in the adoption of a new Mission Statement and a new Vision Statement. This fiscal year (i.e., 2012-2013) is the second year in our planning cycle, and the primary activity this year has been the creation of a proposed 5-Year Plan.

In accordance with the Fellowship's policy governance model, the 5-Year Plan is to be guided by Ends Statements, which flow from the Vision Statement and are intended to help us achieve our Vision. Ends Statements describe the intended recipients and the desired effect we want to achieve during a particular 5-year period.

Unlike past plans that have contained goals and very specific objectives, this proposed plan contains suggested strategies for each of the Ends Statements. The suggested strategies support the Ends Statements and are intended to further elaborate upon, or illustrate, them. Suggested strategies are not intended to be prescriptive, and they are not necessarily the specific means for achieving the ends.

However, it is important that specific means be devised for achieving the desired ends. This happens in two ways. First, the planning model calls for the Governing Board to adopt Annual Objectives, derived from the 5-Year Plan's Ends Statements, which focus on the specific ends that we want to work toward accomplishing during a given year. The Annual Objectives prioritize the Ends Statements and may prioritize strategies contained in the Plan. Annual Objectives are to be set prior to development of the annual budget so that the budget can appropriately address the agreed upon priorities for the year. The Annual Objectives are also to be reviewed throughout the year in order for progress to be monitored.

Second, the X-Team (i.e., the Fellowship's executive staff team) is to oversee development of an annual Implementation Plan that contains measurable tasks and activities that are the means for accomplishing Annual Objectives and 5-Year Plan's Ends Statements. The Implementation Plan describes exactly what we want to do in a given year and the resources required for these activities. Specific tasks and activities are developed by the X-Team, Ministry Teams, and Committees in the areas where they have responsibility. The X-Team develops activities for the Fellowship as a whole, and those activities are monitored by the Board. Ministry Teams and Committees determine their own activities, which are monitored by the X-Team.

The proposed 5-Year Plan has been developed by the Crystal Ball Committee with the assistance of the Governing Board and staff. Last year's process to develop a new Vision Statement and a new Mission Statement included a great deal of broad-based congregational input, and these statements were formally approved by the Congregation in May 2012. Because the development of Ends Statements flows from the Vision, congregational input into the Plan came primarily through the Vision. However, the Crystal Ball Committee has worked with the Board, X-Team, and staff to develop the Plan.

Vision Statement

The Fox Valley Unitarian Universalist Fellowship is a vibrant, welcoming, caring, and diverse community. We are guided by our Unitarian Universalist principles, which challenge us to grow in mind and spirit and inspire us to build a better world. We reach out to the wider community to be leaders in social justice and to invite those who share our vision to join us. We are a deeply committed community where values and action matter. (Adopted May 20, 2012)

Ends Statements and Strategies

The Ends Statements below align with the areas included in the Vision Statement, and they include the required elements of desired effect and intended population. The suggested strategies for achieving our ends are the results of discussions by the Committee, Governing Board, and staff. Costs will need to be projected and considered in selecting more focused Annual Objectives and developing specific implementation plans.

What follows are proposed Ends Statements, with some suggested strategies, in the four areas articulated in the Fellowship's Vision Statement.

Welcoming

Throughout the vision and planning processes, it was clear that the Fellowship is deeply committed to welcoming everyone, from those who are new to the community to those who have been long-time members and friends. To be truly welcoming requires that we all accept our responsibility to be informed about and engaged with our UU heritage, our community, and each other.

Ends Statement: People of northeast Wisconsin seeking a liberal religious spiritual home will find the Fellowship a loving and caring community that will joyfully accept and include them.

Strategy Ideas:

- ⇒ Initiate efforts to make sure that our new space and our transition to using it are welcoming.
- ⇒ Initiate training for the entire Congregation on being welcoming, including how to talk about Unitarian Universalism, how to effectively welcome new people and each other, and that welcoming is everyone's responsibility.
- ⇒ Increase the methods for accessing and experiencing the Fellowship's programs whether at remote locations or through the use of modern technologies.
- ⇒ Engage in market research and additional marketing to targeted audiences, including an increased emphasis on social media and advertising.
- ⇒ Increase communication about opportunities for and the benefits of small group participation.

Spiritual Growth

A mission of the Fellowship is to inspire spiritual growth in people of all ages, and throughout the planning process a number of themes emerged related to this mission. The importance of keeping youth and young adults engaged was regularly articulated and deemed important enough to require a separate Ends Statement. Similarly, the contribution of the music program in spiritual development was frequently noted.

Ends Statement: Seekers of all ages will find a nurturing and liberating environment that will feed the spirit and challenge the mind.

Strategy Ideas:

- ⇒ Expand the music program to provide more offerings and more opportunities for participation for all ages.
- ⇒ Initiate efforts to increase cultural competence and cultivate diversity.
- ⇒ Expand Journey Group participation to 50% of the membership.
- ⇒ Continue to offer a wide range of service topics, and tie all programming to common themes.
- ⇒ Strengthen the connection of children and youth to the worship life of the Fellowship, e.g., offer more intergenerational programming.

Ends Statement: Youth (ages 12-17) and young adults (ages 18-35) will discover lasting ways to connect to the Fellowship and the greater Unitarian Universalist community.

Strategy Ideas:

- ⇒ Increase ministerial and staff time specifically devoted to meeting the needs of young members, and offer more youth and young adult programming.
- ⇒ Regularly survey youth and young adults for their ideas on how to strengthen their connections.
- ⇒ Provide more opportunities for youth including youth led services and outings or service projects.
- ⇒ Enlist young adults to assist with youth programming.
- ⇒ Offer more opportunities for youth involvement in the music program.

Social Justice Leadership

Leading in social justice is a mission of the Fellowship, and several aspects of this mission emerged during the planning process. Institutionally, the Fellowship can be a leader in advocating for social justice, but it can also assist in preparing individual members and friends to participate in social justice activities aimed at building a better world.

Ends Statement: Members and friends of the Fellowship will be a bold voice for those suffering injustice, will advocate public policies that value the worth and dignity of all, and will extend our hearts and hands to those in need in our community and beyond.

Strategy Ideas:

- ⇒ Provide opportunities for participation by all ages, including, but not limited to, a social justice component in the religious education program, a social justice training program for adults, focused social action task forces, and one-time social action events.
- ⇒ Facilitate social justice in the wider community through providing meeting space for outside groups, hosting conferences and workshops, drafting public policy documents, and providing information about opportunities to influence social justice policies.
- ⇒ Provide pastoral and mutual support for Fellowship or community members engaged in social justice work.
- ⇒ Manage Fellowship business practices consistent with our social justice principles.
- ⇒ Build a strong endowment to help fund social justice projects.

Mutual Commitment

Mutual commitment by members and friends is required to enable the Fellowship to achieve its mission and vision. Throughout the planning process, the importance of our commitment to giving our time, talent, and money was stressed. Not only are we committed to supporting our staff, building, and programs, but we are committed to strengthening Unitarian Universalism by developing our Oshkosh satellite and collaborating with neighboring congregations.

Ends Statement: We are generous and creative people dedicated to supporting the staff, programming, and infrastructure that make our shared dreams a reality.

Strategy Ideas:

- ⇒ Strengthen the leadership development program to ensure that the Fellowship continues to be served by well-trained and prepared leaders.
- ⇒ Support the Stewardship Committee in its efforts to create a culture of generosity within the Fellowship.
- ⇒ Develop more methods for helping members and friends discover how they can connect with the Fellowship in areas about which they are passionate.
- ⇒ Find creative ways to tell the story of the impact the Fellowship makes on our community, the region, and the world.
- ⇒ Find ways for older adults to stay connected to our caring community that will allow them to share their wisdom while living out their lives to the fullest.

Ends Statement: We will strengthen our Oshkosh satellite and collaborate with our neighboring and partner Unitarian Universalist congregations to make Unitarian Universalism stronger and more vibrant.

Strategy Ideas:

- ⇒ Increase the ministerial presence at the Oshkosh satellite and work toward weekly services there.
- ⇒ Develop a formal religious education component of the programming at the Oshkosh satellite.
- ⇒ Be more intentional about including activities at the Oshkosh satellite in Fellowship communication and marketing efforts.
- ⇒ Work with the Fond du Lac and Green Bay congregations to strengthen our relationship and engage in collaborative activities.
- ⇒ Increase awareness, understanding, and participation in international partner church relationships.