

Planning Model for FVUUF

Accepted by Board: May 18, 2010

Background

At the March 16, 2010 meeting of the Fellowship Board, a Planning Task Force was established and charged with several tasks, including clarifying how planning should happen at the Fellowship.

The Task Force, comprised of Debra Cronmiller, Miriam Douglass, Theresa Hannah, Rick Krumwiede, and Rev. Dottie Mathews, held four meetings to discuss these planning issues. This document describes the Task Force's view of how the Fellowship should engage in planning in the future.

Recommended Planning Model

The Task Force recommends that the Fellowship regularly engage in a 5-year planning cycle, i.e., a new long-range plan will be created every five years. Specific elements of the planning model need to take place each year of the cycle, and a variety of parties have primary responsibility for the various planning elements.

	Planning Element	Primary Responsibility
Year 1	Vision Statement Mission Statement Annual Objectives* Implementation Plan* Monitor Progress*	Crystal Ball Committee Crystal Ball Committee Board, X-Team X-Team, Ministry Teams, Committees Crystal Ball Committee, Board
Year 2	5-Year Plan Annual Objectives* Implementation Plan* Monitor Progress*	Crystal Ball Committee Board, X-Team X-Team, Ministry Teams, Committees Crystal Ball Committee, Board
Year 3	Annual Objectives Implementation Plan Monitor Progress	Board, X-Team X-Team, Ministry Teams, Committees Crystal Ball Committee, Board
Year 4	Annual Objectives Implementation Plan Monitor Progress	Board, X-Team X-Team, Ministry Teams, Committees Crystal Ball Committee, Board
Year 5	Annual Objectives Implementation Plan Monitor Progress	Board, X-Team X-Team, Ministry Teams, Committees Crystal Ball Committee, Board

*Based on previous 5-year plan

The recommended 5-year planning model includes the following elements:

Vision Statement: The Vision Statement articulates the Congregation's shared sense of the future of the Fellowship. It describes what we want to become, and it guides us

toward the future. It is anticipated that the Vision Statement will contain a complete description of the Fellowship's vision, but it should also contain a summary paragraph that can stand alone, i.e., the short version of our Vision.

It is recommended that the Crystal Ball Committee lead the Fellowship through a process to create a new Vision Statement every five years. The resulting Vision must be based on the hopes and dreams of all members of the Fellowship, and it should also consider the role of the Fellowship in the wider community. The Vision Statement must be formally approved by the Congregation.

Mission Statement: The Mission Statement follows from the Fellowship's vision. The Mission Statement describes the reason that the Fellowship exists, i.e., our core purpose. The Mission Statement is short and succinct, almost a tagline, and can be easily remembered and recited by every member of the Fellowship.

It is recommended that the Crystal Ball Committee coordinate the review and any proposed revision of the Mission Statement as part of the vision process. Furthermore, it is recommended that the Congregation vote at each annual meeting to affirm the Mission Statement. Regardless of the year in the planning cycle, if the Congregation should not overwhelmingly affirm the Mission Statement, the Board should ask the Crystal Ball Committee or another group to investigate changing the statement.

5-Year Plan Goals: The Goals (Ends Statements) contained in the 5-Year Plan follow from the Vision Statement and are intended to guide the Fellowship toward achieving our Vision. The Goals are general statements of the ends we want to achieve during a particular 5-year period. In fact, the Goals are also our Ends Statements.

Because the 5-Year Goals (Ends Statements) are likely to be very general, it is recommended that suggested strategies (not specific activities) or benchmarks in support of the goals be included in the Plan. These suggested strategies and benchmarks are intended to further elaborate upon the intent of the Goals or further define our ends. They are not intended to be the specific means for achieving the Goals.

It is recommended that a comprehensive planning process be conducted at least every five years and that this process be coordinated by the Crystal Ball Committee. Such a process requires broad-based input from all segments of the Congregation, and the resulting Plan must be approved by the Congregation. It is also recommended that the Board hold a special meeting each quarter to ensure that there is sufficient interaction between the Board and Crystal Ball Committee during the planning process.

While it would be possible for the 5-Year Plan to be developed in the same year that a vision process occurs, it is recommended that the Plan be developed in the year following adoption of a new Vision Statement. This will lessen the burden on the Crystal Ball Committee and will allow them to more easily engage in other planning activities, e.g., facilitating Board/X-Team retreat, monitoring progress, specific data collection or evaluation assigned by the Board.

Annual Objectives: Annual Objectives derive from the 5-Year Plan Goals (Ends Statements), focus on the specific ends that we want to accomplish during a given year, and are formally approved by the Board. The Annual Objectives prioritize the 5-Year Plan Goals or the suggested strategies and benchmarks contained in the Plan. Annual Objectives should 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 should be reviewed midway through the year.

It is recommended that the Board and X-Team collaborate to set and review the Annual Objectives. Setting the Annual Objectives should be done in February or March and might be accomplished most effectively during a retreat that is facilitated by the Crystal Ball Committee.

Implementation Plan: The Implementation Plan contains measurable tasks and activities that are the means for accomplishing Annual Objectives and 5-Year Plan Goals. The Implementation Plan describes exactly what we want to do each year. 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 activities, which are monitored by the X-Team.

Values: The Fellowship's Values are the overarching principles that link the Fellowship to our UU beliefs. Because they tend to be timeless in nature, the articulation of Values is not part of the regular 5-year planning cycle. However, formal adoption of Values is by the Congregation, and all of the Fellowship's plans must be consistent with its Values.

It is recommended that the Fellowship's Values be reviewed annually by the Board and X-Team. If it should be determined that the Values need to be addressed, the Board and X-Team could do this work, or the Board could assign this task to the Crystal Ball Committee or another group.

The proposed planning model is summarized in the chart on the next page.

FVUUF Planning Model – Summary Chart

	Description	Update Frequency	Input Needed	Developed By	Approved By
Values	Values are the overarching principles that link the Fellowship to our UU beliefs.	Because of their timeless nature, the articulation of Values is not part of the regular 5-year cycle.	Regular input is needed from the Congregation.	Board and X-Team, perhaps with facilitation by Crystal Ball Committee.	Congregation
Vision Statement	Conveys our shared sense of the future. It articulates what we want to become and guides us toward the future. The Vision Statement is comprehensive and contains a summary paragraph that can stand alone.	The Fellowship should engage in a vision process every 5 years.	Broad-based input is needed from all segments of the congregation.	The Crystal Ball Committee coordinates the vision process.	Congregation
Mission Statement	Derived from the Vision, the Mission describes the reason we exist – our core purpose. Ideally the statement is succinct and can be easily memorized and repeated by the membership.	Congregation annually affirms the Mission Statement. Reviewed during vision process or when Congregation wants to change it.	Input received annually from Congregation. Broad-based input needed if a change is desired.	Normally part of vision process. At other times Board could assign task to Crystal Ball Committee or another group.	Congregation
5-Year Plan Goals (Ends Statements)	Following from the Vision, the goals are general statements of the ends we want to achieve. Suggested strategies or actions in support of the goals will be included in the Plan.	A comprehensive planning process should be conducted every 5 years, the year following the vision process.	Broad-based input is needed from all segments of the congregation.	The Crystal Ball Committee coordinates this process.	Congregation
Annual Objectives	Annual Objectives focus on the specific ends that we want to accomplish during a given year.	Objectives are set annually, prior to development of the annual budget (Feb.-Mar.), and are reviewed midway through the year.	Board and X-Team collaborate to set annual objectives.	Developed by Board and X-Team during retreat, possibly facilitated by Crystal Ball Committee.	Board
Implementation Plan - Tasks and Activities	Implementation Plan contains specific tasks and activities are the means for accomplishing Annual Objectives and Plan Goals.	Tasks and activities are developed annually.	X-Team, Ministry Teams, and Committees.	X-Team develops activities that are monitored by the Board. Ministry Team and Committee activities are monitored by the X-Team.	

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