

Fox Valley Unitarian Universalist Fellowship 3-Year Rolling Strategic Plan

Last updated: 7/19/23 - Adopted 8/22/2023 via email - after 8/19/2023 board meeting review



Key: All goals are tied to a Vision Statement section. They correspond to:

V1: Welcome Seekers

V2: Build Loving Community

V3: Act Courageously for Justice.

Items that require an additional financial commitment beyond the Annual Budget are identified with a: \$

MISSION AND VISION - CONNECTING PRIORITIES

We welcome seekers, build loving community, and act courageously for justice

V1. Welcome Seekers

We embrace each person as their authentic self.

We foster curiosity and wonder in people of all ages.

We explore spirituality from diverse sources.

We balance passion with open-mindedness.

V2. Build Loving Community

We create an inclusive and compassionate community.

We nurture personal spiritual growth and involvement in congregational life.

We use our abundant gifts to sustain vibrant programs and traditions.

We reach out to each other and to our borderless world with love and radical kindness.

V3. Act Courageously For Justice

We choose love over fear, individually and collectively.

We engage deeply in the work of challenging assumptions, biases, and privilege.

We collaborate with partners to build a more just and equitable world.

Area of Focus 1 - Facilities: Building and Grounds

HIGHEST STRATEGIC PRIORITY: 1A Building Maintenance Plan

Year 1 Goal	Year 1 Implementation	Year 2 Goal	Year 2 Implementation	Year 3 Goal
<p>1A.I - Building Maintenance and Improvement Plan researched and created. (V2) \$</p> <p>Workload: Board - S Task Force - M XT (DFO) - M</p>	<p>Create a charge for a task force and recruit the task force (Board and XTeam (DFO))</p> <p>Include sustainability improvements as part of charge to task force (Board and DFO)</p> <p>Get feedback from the XTeam (Board)</p> <p>Task force researches cost of contractors for assessments. (Task force)</p> <p>Funds allocated for assessments from contractors (Board and DFO)</p> <p>Task force implements the charge and reports to the board. (Task force & DFO)</p> <p>Communications Plan (Board & Task Force)</p>	<p>1A.II. Implementation of the Building Maintenance and Improvement plan. (V2) \$</p>	<p>Board figures out where the money is coming from (Board)</p> <p>Board adopts the plan as a policy and makes any policy changes necessary (Board)</p> <p>Continue Communications Plan. (Board)</p> <p>Implementation of plan (DFO)</p>	<p>1A.III. Potential Capital Campaign (See: 5B III).</p>
<p>1B.I - Begin Plans for New Playground. (V2) \$</p>	<p>Charter a task force and recruit. (Board & XT) *Could be an existing</p>	<p>1B.II - Plan & Build Playground. (V2) \$</p>	<p>Get assessments and proposals for projects (Task Force)</p>	<p>1B.III - Maintenance Plan. (V2) \$</p>

Workload: Board - 0 Task Force - S XT - M Staff (DRE) - S	team Make sure we have playground insurance (XT)		Fundraising (Board/Fundraising/GEM) Choose plans or models Contract and Build	
1C.I - Memorial Garden Plan Developed. (V2) Workload: Board - 0 Task Force - M XT - S	Develop/ finalize plan, get assessment and proposals for projects (MG Comm/ XT) Plan fundraising, if needed (XT, Fundraising Comm)	1C.II - Build Memorial Garden. (V2)	Fundraising plan (Board/ Fundraising Comm) Build Garden (MG Comm/ XT) Engrave names of those memorialized on our grounds (MG Comm, XT)	1C.III - Maintenance Plan for the Memorial Garden. (V2) \$

Area of Focus 2: Spiritual Growth & Congregational Life

HIGHEST STRATEGIC PRIORITY: Priority 1: 2C Religious Education for children/ youth

Priority 2: 2D Leadership Development Committee

Year 1 Goal	Year 1 Implementation	Year 2 Goal	Year 2 Implementation	Year 3 Goal
2A.I - Increase participation in programs for adults at the Fellowship. (V1) 1. Increase participation in Journey Groups	Build awareness of journey groups/ communications plan (SrM, Sec, AFD) Create an ongoing committee to support recruitment, training, and	2A.II - Continue increasing participation in programs for adults at the Fellowship. (V1) 1. Continue increasing involvement in	Continue increasing awareness of journey groups/ communications plan (Sr M, AFD) Create a transparent process by which staff or lay-led programs or	2A.III - Assess and maintain participation in programs for adults at the Fellowship. (V1 & V2)

<p>(Goal - from 9% participation to 15%).</p> <p>2. Increase participation in Wellspring programs</p> <p>3. Realign small groups with the ministry of the Fellowship as a whole.</p> <p>Workload: Board - 0 XT (SrMin) - S Task Force (AFD) - M</p>	<p>assessment of leaders and members (SrM)</p> <p>Create at least one additional onramp for joining journey groups (SrM, Sec and AFD)</p> <p>Increase size of Wellspring committee and re-constitute ongoing meetings (SrM)</p> <p>Re-boot Wellspring programs in conjunction with Soup Saturday or on a Sunday after services (SrM, Sec and AFD Team)</p> <p>Establish consistent process for formation and ongoing maintenance of small groups (social, support, etc) (SrM, Sec)</p> <p>Measure current engagement between small groups and other Fellowship programs (Sr Min, Ast Min Sec)</p>	<p>journey groups (Goal - 25% of congregation members & friends involved in Journey Groups).</p> <p>2. Increase engagement between small groups and additional Fellowship programs.</p>	<p>classes for adults can be offered to supplement Wellspring Weekends. (SrM, Sec and AFD)</p> <p>Establish a consistent process for formation and ongoing maintenance of small groups (social, support, etc.) (SrM, Sec, AFD)</p>	
		<p>2B.II - Shared Congregational Vision for the future of Music</p>	<p>Work with staff and lay leadership to assess goals for the future of Music in worship, and other areas</p>	

		Ministry at the Fellowship. (V2)	of Fellowship life (Music Dir) Set goals for increased diversity in repertoire, spiritual depth, and engagement (Music Dir)	
2C.I - Assess attendance and satisfaction in children's and youth RE programs and initiate changes to increase engagement. (V1 & V2) Workload: Board - 0 XT (SrMin/ Asst Min)- S Staff (DRE) - M	Monitor current attendance and survey children, youth and families to learn what they are seeking in RE (XT and DRE/Religious Education staff [RES]) Offer a weekend camp to build relationships among members of the congregation, connection, learn religious traditions, and enhance spiritual growth (Sr Min/ DRE/RES) Explore alternative scheduling and means by which to increase attendance and involvement (DRE/RES w/XT)	2C.II - Increase RE attendance, satisfaction, and engagement. (V1 & V2) 2C.II.i - Enhance parents' educational leadership in spiritual concepts to provide spiritual growth of RE when not at the Fellowship. (V1 & V2)	Implement family ministry and extracurricular RE programs outside of Sunday Services (DRE/RES) Run one weekend camp during the program year and one week-long summer day camp reaching out to the broader community (DRE/RES) Modify programs to increase engagement and energy among participants and awareness among families and adults (and childless adults) (DRE/RES)	2C.III - Continue ongoing evaluation and adjustment of program and ongoing education of staff and lay leaders about trends in UU RE. (V2)
2D.I - Assess the function and charge of the Leadership Development Committee [LDC]. (V2)	Examine charge to LDC and adapt as necessary, within the parameters set by the bylaws (Board with LDC)	2D.II - Adapt to the new charge in cultivating and training future leaders within the congregation. (V2)	Offer the new leadership program. Create an implementation and measurement plan (LDC)	2D.III - Increase participation in leadership programs. (V2)

Workload: Board - S LDC - M	Adapt curriculum for Leadership Path (LDC)			
		2E.II - Track Average Weekly Participation. (V2)	Teach leaders of various groups to use the church management system (CMS) to track attendance and input data. Transition Sunday weekly tracking to new system	2E.III - Increase Average Weekly Participation by 10%. (V2)

Area of Focus 3: Administration & Organization

HIGHEST STRATEGIC PRIORITY: Priority 1: 3A Modernize IT systems

Priority 2: 3B Governance Structure

Year 1 Goal	Year 1 Implementation	Year 2 Goal	Year 2 Implementation	Year 3 Goal
3A.I - Modernize Information Technology Systems. (V2) \$ Workload: Board - 0 XT (DFO) - L Staff - M	Start implementing the new church management software (database for tracking membership and generosity), transitioning old data to new systems (Staff/DFO) Transition from a server-based storage system to cloud-based storage system (DFO)	3A.II - Increase staff facility with new software. (V2)	Eliminate all other Google Docs/ Excel Spreadsheets, with various ministry commitments (Staff)	3A.III - Successful congregational engagement with new software/ system. (V2)

<p>3B.I - Alter the governance structure and introduce model(s) to the congregation, change Bylaws as needed. (V2 & V3)</p> <p>Workload: Board - M XT - S</p>	<p>Building system to educate new board members (Board/XT)</p> <p>Create strategic plan (Board/XT)</p> <p>Make changes to bylaws as needed (Board/ Congregational Vote)</p>	<p>3B.II - Change Policies as necessary to adapt to the new governance structure. (V2 & V3)</p>	<p>Review bylaws and policies (Board subcommittee)</p> <p>Make changes to board policies as needed (Board)</p>	<p>3B.III - Successfully implement and monitor new changes to Bylaws and Policies as adapted. (XT/Board) (V2 & V3)</p>
<p>3C.I - Review and Recommend Updates to HR Policies (for compliance) & Practice. (V2 & V3)</p> <p>Workload: Board - HR Comm. - XT -</p>	<p>Update Employee Handbook (XT, HR, Board)</p> <p>Receive and evaluate the report of the HR Committee on HR Policies (HR, Board)</p> <p>Create emergency/ contingency plans (HR, Board, XT)</p>	<p>3C.II - Assess employee satisfaction and retention based on new HR policies and employee evaluation metrics, including personnel needs and wants. (V2 & V3)</p>	<p>Review staff responsibilities and assess workload capacity (XT/Staff)</p> <p>Develop future recommendations on staff expansion/rearrangement (roles, number of staff, etc.) to best serve the congregation (XT)</p>	<p>3C.III - Begin to implement staffing recommendations and research and implement market rates for employee compensation and benefits that meet the needs of Fellowship staff. (V2 & V3) \$</p>
<p>3D.I - Assess Employee Performance Appraisal Processes. (V2 & V3)</p> <p>Workload: Board - HR Comm. - XT -</p>	<p>Review employee evaluation system, make recommendations, and deploy new evaluation metrics and tools as recommended (HR, Board, XT)</p>	<p>3D.II - Assess new employee evaluation system for successful implementation and make necessary adjustments. (V2 & V3)</p>	<p>Conduct XTeam evaluations using the new evaluation system and determine adjustments and make revisions as needed (Board, XT)</p>	

Area of Focus 4: Social Justice & Justice Action Ministries

HIGHEST STRATEGIC PRIORITY: Priority 1: 4B Awareness of the Fellowship in wider community/ partnerships

Priority 2: 4A Participation in JAMs

Year 1 Goal	Year 1 Implementation	Year 2 Goal	Year 2 Implementation	Year 3 Goal
<p>4A.I - Broaden participation and deepen involvement at Fellowship JAM and justice ministries events. (V2 & V3)</p> <p>Workload: Board - 0 XT (Asst Min) - M Task Force (JAM) - M</p>	<p>Gender Justice JAM (initial interest meeting late summer or early fall) (AsstMin/ JAM Facs)</p> <p>JAM-specific leadership training (AsstMin/ JAM Facs)</p>	<p>4A.II - Define/structure relationships between JAM facilitators and minister(s). (V2)</p>	<p>Bring in an outside facilitator to help with structural conversations about JAMs/justice ministries. (AstMin)</p>	<p>4A.III - Growth of independence & mission alignment of JAM leadership and JAM efforts in their ministry. (V2 & V3)</p>
<p>4B.I - Build awareness of the Fellowship in the wider community and forge relationships with partners. (V3)</p> <p>Workload: Board - 0 XT (Asst Min) - L Task Force (JAM) - S</p>	<p>One-on-ones with local ministers or organization leaders (2 in fall, 2 in spring) (AsstMin/ JAMs)</p> <p>Second Annual Rising Together (January or February) (AsstMin/ JAMs)</p> <p>Keep moving the ball on refugee sponsorship partnering (as it comes up) (AsstMin/ Im Justice)</p>	<p>4B.II - Increase collaboration with other faith communities. (V3)</p>	<p>At least one or two other faith communities represented on Rising Together planning team (JAMs, Staff)</p> <p>Some kind of event to forge partnerships among lay people/volunteers with potential congregation or organization (Staff)</p>	<p>4B.III - Establish at least one ongoing partnership with an organization or faith community that expands the Fellowship's capacity (both volunteers and money). (V3)</p>
<p>4C.I - Stay Connected with UUA Partner Church / International Groups as they continue to re-form. (V2 & V3) \$</p>	<p>Quarterly check-ins with Rev. Morgan McLean at the UUA (AsstMin)</p>	<p>4C.II - Discernment process about ongoing commitment to our partner churches. (V2 & V3) \$</p>	<p>Planning conversation in late summer or early fall 2024 with lay leaders to determine next steps (AsstMin, PCC)</p>	

Workload: Board - 0 XT (Asst Min) - S Task Force (PCC) - S	Partner Church Team connects UUA efforts with the Fellowship (PartnerChurch Comm)		Vote to recommit/not recommit prior to the June 2025 annual meeting (XT/ Board/ PCC)	
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Area of Focus 5: Generosity & Budget Sustainability (Financial Well-being)

HIGHEST STRATEGIC PRIORITY: 5A Diverse Generosity Sustainability Plan

Year 1 Goal	Year 1 Implementation	Year 2 Goal	Year 2 Implementation	Year 3 Goal
5A.I - Develop a Diverse Generosity Sustainability Plan (V2) Workload: Board - M XT - S	Assess capacity and increase awareness in giving patterns/ prospect research (XT & GEM Task Force) Create a Board task force, research other income revenue streams (i.e. rentals/preschool, grants, sale of land) (XT & Board Task force)	5A.II - Implement Diverse Generosity Sustainability Plan (V2) \$	Outline confident revenue projection for budget sustainability and accuracy (XT & GEM) Develop various giving on-ramps for Fellowship budget alignment (XT & GEM) Implement 1 new revenue stream for financial growth (XT & Task Force)	5A. III - Develop Endowment expansion recommendations to produce income/revenue draw to pay for unknown future expenditures (V2)
		5B.II - Create a Task Force charged in developing a Capital Campaign to meet capital needs as assessed (V2)	Develop a task force or committee of the board to develop a capital campaign; including researching, assessing needs, and creating incentive for giving (eg: reducing mortgage,	5B.III - Begin potential Capital Campaign / feasibility study to fund ongoing capital needs, possibly playground, and/or mortgage reduction. (V2) \$

			building a playground, solar power) (Board & XT)	5B.III - Generate financial income to pay down the mortgage by 25%. (V2) \$ 5B.IV - Generate financial income to pay down the mortgage by 50% (100% in year 5). (V2) \$

Area of Focus 6: Communication and Public Relations

HIGHEST STRATEGIC PRIORITY: 6B Assess communication tools or recommendations

Year 1 Goal	Year 1 Implementation	Year 2 Goal	Year 2 Implementation	Year 3 Goal
6A.I - Develop merchandise for brand visibility and to generate additional funds for discretionary spending (Brand Recognition & Development) (V1 & V2) Workload: Board - XT (--) Task Force (--) 	Explore merchandising and branding options Request congregation members design and create branded materials to be sold via Bonfire Sell more than 50 items (Staff, Volunteers)	6A.II - Assess needs for volunteer PR/ design support Design new signage and/or create signs on the berm or for congregation household lawns (Brand Recognition & Development) (V1 & V2) \$	Install attractive and intriguing (mission responsive) signs on berm and in congregational household lawns. (Staff) Host sign-waving parties to attract brand recognition and offer positive messages of support to the community (Staff)	6A.III Develop additional merchandise and branding materials for the Fellowship (Brand Recognition & Development) (V1 & V2)
6B.I - Assess communication tools or recommendations from the congregation to assist	Explore communication strategies of other congregations. (Staff)	6B.II - Enhance written and electronic (Scroll e-newsletter) communication for better	Re-design the Scroll e-newsletter (Sec/ XT)	6C.II - Implement Communication and Public Relations Plan (V1 & V2)

<p>in better understanding of the goings-on at the Fellowship (V1 & V2)</p> <p>Workload: Board - S XT - S Staff (Sec) - M</p>	<p>Examine new avenues of communication to be used with the congregation, explore how the congregation receives information, and develop new strategies for better access, understanding, and participation (Staff/ Board)</p>	<p>understanding of the goings-on at the Fellowship (V1 & V2)</p>	<p>Seek feedback from congregation on new forms of communication to better enhance congregation involvement, feedback efforts, and strengthen participation in programming (Staff/ Board)</p>	
		<p>6C.I - Develop Communication and Public Relations Plan (V1 & V2)</p>	<p>Develop a Communication and PR plan (Staff/ Board)</p> <p>Establish a committee to assist in PR/ design implementation (Staff)</p>	