

Fox Valley Unitarian Universalist Fellowship 3-Year Rolling Strategic Plan

Last updated: 5/13/2024 - Adopted 5/14/2024



Key: All strategic 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.

2024-2025- Highest priorities are highlighted in yellow -

Building/Maintenance Plan, Financial Sustainability, Interpersonal Connections

Area of Focus 1 - Facilities: Building and Grounds

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
<p>1A.I - Building Maintenance and Improvement Plan researched and created. (V2) \$</p> <p>Workload: Board - S Task Force - M DFO - L</p>	<p>Seek out and pay a professional who can complete a building maintenance and improvement needs assessment. (Board and DFO)</p> <p>Recruit the task force (Board and XTeam (DFO)</p> <p>Include sustainability improvements and prioritize HVAC plan and implementation as part of final plan. (Board and DFO)</p> <p>Task force develops the maintenance and improvement plan and reports to the board. (Task force & DFO)</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>Communications Plan (Board & Task Force)</p>	<p>1A.II - Building Maintenance and Improvement Plan is implemented (V2). \$</p>	<p>Building maintenance plan is implemented.</p> <p>Continue Communications Plan. (Board)</p>	<p>1A.III. Potential Operating Campaign (V2). (See 5A.III)</p>

<p>1B.I - Begin Plans for New Playground. (V2) \$</p> <p>Workload: Board - 0 Task Force - S DFO - S Sr Min - S DRE - S</p>	<p>Charter a task force and recruit. (Sr Min/ DRE)</p> <p>Make sure we have playground insurance and any parameters around that insurance. (DFO)</p> <p>Get assessments and proposals for projects (Task Force)</p>	<p>1B.II - Build Playground. (V2) \$</p>	<p>Fundraising (Board/GEM)</p> <p>Choose plans or models (Task force/ XT)</p> <p>Implement and build (XT/ Task force)</p>	<p>1B.III - Develop Maintenance Plan. (V2) \$</p>
<p>1C.I - Maintenance Plan for the Memorial Garden. (V2) \$</p> <p>Workload: Board - 0 Task Force - S Sr Min - S DFO - S</p>	<p>Develop a maintenance plan and establish parameters for funding and operations of maintenance. (Memorial Garden Team/ Sr Min/ DFO)</p>	<p>1C.II - Memorial Garden expansion (Phase 2) starting. (V2)</p>	<p>Research, plan, and begin implementation of expanded garden elements (possible fence, benches, etc)</p>	<p>1C.III - Memorial Garden expansion (Phase 2) continuing</p>

Area of Focus 2: Spiritual Growth & Congregational Life

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
<p>2A.I - Increase opportunities for interpersonal connection in programs for adults at the Fellowship. (V1)</p> <p>Workload:</p>	<p>Reshaping and implementing programs and opportunities for congregational engagement), including consideration of alternative approaches such as weekend retreats. (SrM, Sec, AFD)</p>	<p>2A.II - Continue increasing participation in programs for adults at the Fellowship (Goal of 10% increased engagement over previous year). (V1)</p>	<p>Continue implementing programs and opportunities for adult connection and engagement, adjusting as appropriate to improve involvement.</p>	<p>2A.III - Assess and maintain participation in programs for adults at the Fellowship. (V1 & V2)</p>

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
Board - O Sec - M XT (SrMin) - L Task Force (AFD) - L	<p>Establish and communicate consistent process for formation and maintenance of all types of connection opportunities, including classes, programs, and lay-led organic gatherings) (SrM, Sec, AFD)</p> <p>Increasing awareness of journey groups and other small groups. Create additional onramps for joining journey groups. (SrM, Sec, AFD)</p> <p>Measure current engagement in adult connection opportunities. (Sr Min, Sec, AFD)</p>		<p>Assess barriers to involvement.</p> <p>Measure current engagement between small groups and other Fellowship programs.</p>	
<p>2B.I - Shared Congregational Vision for the Future of Music Ministry at the Fellowship. (V2)</p> <p>Music Dir - M</p>	<p>Work with staff and lay leadership to assess goals for the future of Music in worship, and other areas of Fellowship life (Music Dir)</p> <p>Set goals for increased diversity in repertoire, spiritual depth, and engagement (Music Dir)</p>			

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
<p>2C.I - Increase RE attendance, satisfaction, and engagement. (V1 & V2)</p> <p>2C.II.i - Enhance parents' educational leadership in spiritual concepts to provide spiritual growth of RE when not at the Fellowship. (V1 & V2)</p> <p>Workload: Board - 0 XT (SrMin)- S DRE - L RE Support - L</p>	<p>Implement family ministry and extracurricular RE programs outside of Sunday Services (DRE/RES)</p> <p>Run two weekend camps during the program year, potentially reaching out to the broader community (DRE/RES)</p> <p>Modify programs to increase engagement and energy among participants and awareness among families and adults (and childless adults) (DRE/RES)</p>	<p>2C.II - Continue ongoing evaluation and adjustment of program and ongoing education of staff and lay leaders about trends in UU RE. (V2)</p>	<p>Continue family ministry, "extracurricular," and multigenerational programs to engage people of all ages in RE.</p> <p>Run either two weekend camps or one weekend and one week-long summer camp.</p> <p>Continue to work to provide RE that engages children and youth with a range of neurodiversities.</p>	<p>2C.III - Begin a transition to a lifespan faith formation program model. (V1 & V2)</p>
<p>2D.I - Track Average Weekly Participation. (V2)</p> <p>XT (all) - M</p>	<p>Plan the use of the Empower Church Management System (CMS) to track attendance and input data. (XT)</p> <p>Teach leaders of various groups to use the Empower CMS. (XT)</p> <p>Transition Sunday weekly tracking to Empower CMS. (XT)</p>	<p>2D.II - Increase Average Weekly Participation by 10%. (V2)</p>	<p>Use information gathered in the previous year to improve communication and engagement strategies to increase participation.</p>	

Area of Focus 3: Administration & Organization

2023-2024 Goal	Implementation	2024-2025 Goal	Implementation	2025-2026 Goal
<p>3A.I - Increase staff and lay leader facility with new software. (V2)</p> <p>XT (all) - L Staff (non XT) - M</p>	<p>Input updated/corrected data from congregation. (Staff)</p> <p>Training for staff and volunteers/lay leadership to implement Microsoft network and Empower CMS.</p> <p>Eliminate all other Google Docs/Excel Spreadsheets, with various ministry commitments (Staff/Lay Leaders)</p>	<p>3A.II - Successful congregational engagement with new software/system. (V2)</p>	<p>Consistent usage, creation and implementation of processes to increase facility.</p>	
<p>3B.I - Change Policies as necessary to adapt to the new governance structure. (V2 & V3)</p> <p>Workload: Board - M XT (all) - S</p>	<p>Building system to educate new board members (Board/XT)</p> <p>Complete changes to board policies as needed (Board)</p> <p>Create and implement a monitoring plan for strategic plan goals held by the Board. (Board)</p>	<p>3B.III - Successfully implement and monitor new changes policies as adapted. (V2 & V3)</p>		
<p>3C.I. Create processes for monitoring the strategic plan. (V2 & V3) (Board)</p> <p>Board - M XT - S</p>	<p>Implement a process for monitoring the strategic plan. Including both Board and XTeam progress. (Board/ XT)</p> <p>Develop 2026-2027 & 2027-2028 goals and implementation plan (Board/ XT)</p>			

<p>3D.I - Review and Recommend Updates to HR Policies (for compliance) & Practice. (V2 & V3)</p> <p>Workload: Board - S HR Comm. - L XT (all) - S</p>	<p>Updated Employee Handbook is finalized (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>Review staff responsibilities and assess workload capacity (XT/Staff)</p>	<p>3C.II - Implementation of Updates to HR Policies (for compliance) & Practice. (V2 & V3)</p>		<p>3C.III - Develop future recommendations on staff expansion/ rearrangement (roles, number of staff, etc.) to best serve the congregation (XT) (V2)</p>
<p>3E.I - Implement and assess new employee evaluation tools for successful implementation and make necessary adjustments. (V2 & V3)</p> <p>Workload: Board - L HR Comm. - L XT - S</p>	<p>Conduct evaluations using the new evaluation system and determine adjustments and make revisions as needed including:</p> <ol style="list-style-type: none"> 1. Staff Reviews (SrM) 2. Called Minister Review (360 Congregation) 3. XTeam evals (Board) 	<p>3E.II - Assess employee satisfaction and retention based on new HR policies and employee evaluation metrics, including personnel needs and wants. (V2 & V3)</p>		

Area of Focus 4: Social Justice & Justice Action Ministries

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
<p>4A.I - Define/structure relationships between justice ministry lay leaders and minister(s). (V2)</p>	<p>Host retreat with all justice ministry volunteers to facilitate structural conversations about JAMs/justice ministries, including how they are funded. (AsstMin)</p>	<p>4A.II - Increased mission alignment and clear accountability of JAM leadership, JAM efforts, and</p>		

<p>Workload: Board - 0 Asst Min- L JM - L</p>	<p>Clarify/streamline how justice teams/ministries form and function. (including role of JAM facilitators group)</p>	<p>other justice ministries in their ministry. (V2 & V3)</p>		
<p>4B.I - Increase collaboration with other faith communities and partner organizations. (V3)</p> <p>Workload: Board - 0 XT (Asst Min) - L JM - S</p>	<p>One-on-ones with local ministers or organization leaders (AsstMin/ Justice Ministries)</p> <p>Third annual Rising Together, including 1-2 other faith communities represented on the Planning Team (Asst Min/ Justice Ministries)</p>	<p>4B.II - 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>Identifying and supporting lay leaders who can manage some of those partnerships.</p>	
<p>4C.I - Discernment process about ongoing commitment to our partner churches. (V2 & V3) \$</p> <p>Workload: Board - S Asst Min - M PCC - L</p>	<p>Planning conversation in late summer or early fall 2024 with lay leaders to determine next steps (AsstMin, PCC)</p> <p>Vote to recommit/not recommit prior to the June 2025 annual meeting (XT/ Board/ PCC)</p>			

Area of Focus 5: Generosity & Budget Sustainability (Financial Well-being)

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
<p>5A.I - Create a Generosity Sustainability Plan toward the Elimination of the Structural Budget Deficit (anticipate 50% reduction by 2025-26 budget and elimination by 2026-27 budget)-- (V2)</p> <p>Workload: Board - L GEM - L XT - M</p>	<p>Goal to clarify relationships among Board, XTeam, and GEM including reporting structure, direction setting, and accountability structure.</p> <p>Assess capacity and increase awareness in giving patterns/prospect research (XT & Board)</p> <p>Research other income revenue streams (i.e. rentals, events, etc) (XT & Board)</p> <p>Develop various giving on-ramps for Fellowship budget alignment (XT & GEM)</p>	<p>5A.II - Create a Generosity Sustainability Plan to Eliminate the Structural Budget Deficit-- (V2) \$</p>	<p>Outline confident revenue projection for budget sustainability and accuracy (XT & GEM)</p> <p>Implement 1 new revenue stream for financial growth (XT & Task Force)</p> <p>The 2026-27 budget has eliminated the structural deficit. (25-26)</p>	<p>5A.III Develop a major operating campaign to fund capital improvements, expansion, mortgage elimination and/or endowment expansion as informed by capacity assessments in the prior year. (V2) \$</p>

Area of Focus 6: Communication and Public Relations

2024-2025 Goal	Implementation	2025-2026 Goal	Implementation	2026-2027 Goal
<p>6A.I - Develop merchandise for brand visibility and to generate additional funds for discretionary spending</p>	<p>Create a Public Relations/ Outreach Committee (PRO). (XT)</p> <p>Assess PR branding as it currently exists, and audit our needs. (XT/PRO)</p>	<p>6A.II - Assess needs for volunteer PR/ design support</p>	<p>Update website, social media, and other outward-facing brand materials.</p>	

<p>(Brand Recognition & Development) (V1 & V2)</p> <p>Workload: Board - S Sr Min - M Asst Min - S DFO - M PRO- L</p>	<p>Explore merchandising and branding options, and create branded materials to be sold via Bonfire or a similar website. (XT/ Staff/ PRO)</p> <p>Assess other methods for creating additional visibility and /or outreach into our community (tabling at events, hosting events at the Fellowship building) (XT/ Staff/ PRO)</p>	<p>Implement merchandising, branding, or outreach options. (V1 & V2) \$</p>	<p>Create intriguing and attention-getting signage for our berm or to have available in the community.</p> <p>Table at a minimum of 2 community events and host 1 at our Fellowship for outreach purposes.</p>	
<p>6B.I - Assess communication tools or recommendations from the congregation to assist in better understanding of the goings-on at the Fellowship (V1 & V2)</p> <p>6B.II.b - Implement alternative methods of communication as appropriate.</p> <p>Workload: Board - S XT (all) - S Staff (Sec) - L</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>Implement alternative methods of communication if indicated as appropriate from information gathered from congregation (eg, texting). (Staff)</p> <p>Re-design the Scroll e-newsletter. (Staff)</p>	<p>6B.II - Enhance written and electronic (Scroll e-newsletter) communication for better understanding of the goings-on at the Fellowship (V1 & V2)</p>	<p>Seek feedback from the congregation on new forms of communication.</p>	