

Fox Valley Unitarian Universalist Fellowship 3-Year Strategic Plan

Last updated: 5/15/2025 | Adopted: 5/15/2025



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.

Area of Focus 1 - Operations and Administration

2025-2026 Goal	Implementation Guidance	2026-2027 Goal	Implementation Guidance	2027-2028 Goal
1A.I - Building Maintenance and Improvement Plan is implemented (V2). \$ Workload: XT (DFO) - L Board - S	Evaluation of building maintenance plan and constructing funding plan, prioritization of operational funding and capital campaign goals. (Task force) Continue Communications Plan. (Board)	1A.II - Potential Capital Campaign. (See 4A.III)	Consider maintenance, improvements, playground, and environmental sustainability features.	1A.III - Intentionally left blank.
1B.I - Increase staff and lay leader facility with new software. (V2) XT (all) - L Staff (non XT) - M	Input updated/corrected data from congregation. (Staff) Training for staff and volunteers/ lay leadership to implement Microsoft network and Empower CMS. Eliminate all other Google Docs/ Excel Spreadsheets, with various ministry commitments (Staff/Lay Leaders) – Full Transition by Aug. 1, 2025	1B.II - Continue software implementation and adoption. (V2)		1B.III - Intentionally left blank.

1C.I - Successfully implement and monitor new governance changes & policies as adapted. (V2 & V3) Workload: Board - M XT - M	Consistently utilize reporting tool at Board and X-Team level on monthly basis. Develop dashboard for key metrics for transparency between Board and X-Team. Identify role clarity for mutual reporting and accountability.	1C.II - Intentionally left blank. (Continue)		
1D.I - Review and Recommend Updates to HR Policies (for compliance) & Practice. Develop future recommendations for staff optimization. (V2 & V3) Workload: Board - S HR Comm. - L XT (all) - S	Create emergency/contingency plans (HR, Board, XT) Review staff responsibilities and assess workload/capacity (XT/Staff) Identify ideal roles, number of staff, and org design to best serve congregation (HR/Board/Staff)	1D.II - Intentionally left blank.		1C.III - Intentionally left blank.

Area of Focus 2: Spiritual Growth & Congregational Life

2025-2026 Goal	Implementation Guidance	2026-2027 Goal	Implementation Guidance	2027-2028 Goal
2A.I Create hub/spoke model and establish appropriate committees. (V1&V2) Workload:	Transition Leadership Development Committee to engagement hub team and develop strategy and delegation documents outlining roles and responsibilities.	2A.II - Increase lay leadership of spoke teams. (V1&V2)	Identify and upskill leaders Monitor programmatic implementation	2A.III - Intentionally left blank

2025-2026 Goal	Implementation Guidance	2026-2027 Goal	Implementation Guidance	2027-2028 Goal
XT (CLT) - L LDC - L Teams - M	<p>Establish spoke teams, create position descriptions, and staff each team as needed: 1. deep fun, 2. membership, 3. adult faith formation, 4. small groups.</p> <p>Continue existing programs, update website and communications as needed, and transition hub-and-spoke teams to increased leadership and implementation of programs.</p>			
2B.I - Continue increasing participation in programs for adults at the Fellowship (Goal = 10% increased engagement over previous year). (V1) Workload: XT (CLT) - L LDC - S Teams - M	<p>Continue implementing programs and opportunities for adult connection and engagement, adjusting as appropriate to improve involvement.</p> <p>Assess barriers to involvement.</p> <p>Measure current engagement between small groups and other Fellowship programs.</p>	2B.II - Assess and maintain participation in programs for adults at the Fellowship. (V1)	Adjust programs based on attendance and feedback.	2B.III - Intentionally left blank.

2025-2026 Goal	Implementation Guidance	2026-2027 Goal	Implementation Guidance	2027-2028 Goal
2C.I - Continue ongoing evaluation and adjustment of program and ongoing education of staff and lay leaders about trends in UU RE. (V2) Workload: XT (CLT) - M DRE - L	Continue family ministry, “extracurricular,” and multigenerational programs to engage people of all ages in RE. Run either two weekend camps or one week-long summer camp (expansion). Continue to work to provide RE that engages children and youth with a range of neuro-diversities (continue internship program).	2C.II - Begin a transition to a lifespan faith formation program model. (V2)	Integration and optimization of staff and lay leadership in children, youth, and adult religious exploration.	2C.III - Intentionally left blank.
2D.I - Track Average Weekly Participation. (V2) Workload: XT (all) - M Staff (Sec) - M	Plan the use of the Empower Church Management System (CMS) to track attendance and input data. (XT) Teach leaders of various groups to use the Empower CMS. (XT) Transition Sunday weekly tracking to Empower CMS. (XT) Conduct infrastructure/hardware needs assessment for attendance tracking. (XT)	2D.II - Increase Average Weekly Participation by 10%. (V2)	Use information gathered in the previous year to improve communication and engagement strategies to increase participation. Procure infrastructure/hardware identified in 2025-26.	2D.III - Church Management System (CMS) seamlessly integrated into congregational life. (V2)

Area of Focus 3: Social Justice & Justice Action Ministries

2025-2026 Goal	Implementation	2026-2027 Goal	Implementation	2027-2028 Goal
3A.I - JAM leaders collaborate effectively with each other and the ministry team in service of the Fellowship mission and vision (V2 & V3) Workload: Board - 0 XT (HRV) - L JMs - L	Empower JAM facilitators group to purposefully promote collaboration through facilitated planning at annual justice ministry retreat (HRV) As needed, realign ongoing collaboration structures among JAM leaders and ministry team (HRV)	3A.II - Lay leadership drives collaboration in partnership with ministry team. (V2&V3)	Lay leaders invited by ministry team to intentionally create collaboration opportunities that are managed by lay leaders (HRV, JAM) Annual retreat co-created by minister and core justice lay leaders (HRV, JAM)	3A.III - Using Hub & Spoke model, embed shared strategic leadership between JAM leaders and ministry team into structure of Fellowship justice ministries (V2&V3)
3B.I - Increase collaboration with other faith communities and partner organizations. (V3) Workload: Board - 0 XT (HRV) - L JM - S	Host fourth annual Rising Together; expand to a regional event growing additional participation in planning and attendance from UU congregations and organizations around NE Wisconsin; add one more local interfaith partner to the planning team; seek an external funding source for the event (HRV)	3B.II - Establish at least one ongoing partnership with an organization or faith community that expands the Fellowship's capacity (both volunteers and money). (V3)	Identify and upskill/empower one or two lay leaders who can steward one of the partnerships (HRV, JAM) Fifth annual Rising Together, completely funded by outside dollars (HRV)	3B.III - FVUUF is seen as a hub of progressive religious values and courageous action in NE Wisconsin. (V3)

Area of Focus 4: Generosity & Budget Sustainability (Financial Well-being)

2025-2026 Goal	Implementation Guidance	2026-2027 Goal	Implementation Guidance	2027-2028 Goal
4A.I - Create a Generosity Sustainability Plan toward the Elimination of the Structural Budget Deficit (anticipate 50% reduction by 2026-27 budget and elimination by 2027-28 budget) -- (V2) Workload: Board - L Generosity Team - L XT - M	Implement hub & spoke organizational model for giving & finances <ul style="list-style-type: none"> - Recruit hub - ID & recruit for spoke teams - hold retreat in late summer for group alignment Create a perpetual calendar for giving & fundraising to focus efforts Create implementation plan for donor segmentation using data from iWave Pursue one alternative revenue stream that is aligned with our mission Capital campaign plan in place and quiet phase underway by end of '25-'26 fiscal year <ul style="list-style-type: none"> - Consider doing budget analysis/project planning for memorial garden and playground and renewable energy 	4A.II - Create a Generosity Sustainability Plan to Eliminate the Structural Budget Deficit. \$ Potentially launch public phase of capital campaign to fund building improvements, expansion, mortgage elimination and/or endowment expansion as informed by capacity assessments in the prior year. (V2) \$	Outline confident revenue projection for budget sustainability and accuracy (XT & GEM) Implement 1 new revenue stream for financial growth (XT & Task Force) The 2027-28 budget has eliminated the structural deficit. (XT & Board)	4A.III - Intentionally left blank.

	<p>technology as part of a capital campaign (delegated) (apportionment?)</p> <p>Identify the lessons we learned from the Connect & Commit campaign and how we will use them to inform strategic communication around giving.</p>			
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Area of Focus 5: Worship

2025-2026 Goal	Implementation Guidance	2026-2027 Goal	Implementation Guidance	2027-2028 Goal
5A.I - Shared Congregational Vision for the Future of Music Ministry at the Fellowship. (V2) Music Coord - M	<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>	5A.II - Intentionally left blank.		5A.III - Intentionally left blank.
5B.I - Continue adapting and growing the Coffeehouse Service, and Traditional Service. (V1&V2) Workload: XT (HRV) - L XT (CLT) - L	<p>Implement feedback from the congregation as appropriate. Continue experimenting with form and content to meet the current needs of the congregation and anticipate the demographic and spiritual changes to the landscape of this day and age.</p>	5B.II - Implement hub-and-spoke structure for worship. (V1&V2)	<p>In following with the other hub-and-spoke models implemented last year, worship will have a hub team consisting of ministerial and music director leadership, a potential board liaison (TBD), and representatives of the worship leaders, music and</p>	5B.III - Intentionally left blank.

Music Coord - M			worship artists. Spoke teams will include worship leaders, worship artists, music ministry team (to oversee choir, mUUse, and other music programs), and Sunday Helpers. These teams already exist but will function with more independence and clarity of role and structure.	
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Parking Lot - Not currently identified as strategic goals but these are important future goals and not to be lost:

- Strategic communication
- 2026-2027 - Does the board want a liaison to the Justice “Hub group” or the Worship “Hub group”?
- Memorial garden improvement and expansion, and funding/ maintenance plan.
- Playground - build into a capital campaign?
- Next triennial ministerial evaluation takes place 2027-28 (CLT & HRV)