

UNITARIAN UNIVERSALIST CHURCH
Davenport, Iowa
STRATEGIC PLAN, 2008 - 2010¹

MESSAGE FROM THE BOARD OF TRUSTEES

This three-year strategic plan covers January 2008 through December 2010.

MISSION

**The mission of our Unitarian Church is to
*create a vibrant, welcoming, diverse church family which
embraces individual searches for meaning and
devotes itself to community good.***

VISION

Our vision is to be recognized in our community as a beacon on the hill – a vibrant, welcoming, thriving church that:

- Reaches out to members and community with a clear, concise, and inspiring message about Unitarian Universalism and its Principles;**
- Attracts and embraces people of diverse groups, ages and family types;**
- Feeds the mind and spirit regardless of individual pathway;**
- Supports social justice and social action initiatives in our congregation and the greater community;**
- Encourages responsibility for the earth and its creatures.**

The broad vision above can be seen in more specific terms.

- Because we know there are many people in our community who share our UU values but know nothing about our church**

¹ (Approved by Board of Trustees, December 2, 2007, with subsequent e-mail approval of minor corrections voted on and finalized December 14, 2007)

or denomination, we will reach out to these people to join with us both on Sunday mornings and in activities during the week. Why? Because we believe the addition of new, like-minded members and friends will add to the vitality of our congregation and increase both our influence and our ability to impact social justice issues in our community and in the world;

- ❑ Because there is a richness in diversity, we will seek out new members and friends of all ages, family types, races, sexual orientations and theologies so that members and friends of our congregation will reflect as much as possible the diversity of our QC area;
- ❑ Because members, friends, and guests will consistently fill our sanctuary for Sunday services, we will need to add either a second service or service at another site to accommodate our growing congregation;
- ❑ Because our congregation is growing, our religious education program for children will also grow in numbers and vitality and reach children of all ages;
- ❑ Because our congregants believe in multiple spiritual paths, we will provide a variety of worship forms; similarly we will represent our congregation in a variety of social action activities;
- ❑ Because we believe that music is a vital part of the church experience, we will continue to enhance our musical programs and experiences;
- ❑ Because offering our congregation a full range of programs, activities and services is critical to our thriving congregational life, we will add additional staff members commensurate with our growth;
- ❑ With increased leadership training and mentoring by our experienced leaders, younger members will take on lay leadership roles within the church;
- ❑ Because we know that the best way to show our values is to practice them, members and friends will participate actively in social justice activities. Through relationships with other

churches and faith organizations such as Progressive Action for the Common Good (PACG), we will have a strong and growing presence for social action within the community.

- ❑ In order to ensure the comfort and aesthetic enjoyment of our congregation, as well as to make a positive first impression on newcomers and visitors, we will maintain and enhance the existing facilities and campus;
- ❑ Because we committed our congregation to being a “green organization” when we installed geothermal heating and cooling systems, we will continue this commitment by implementing additional steps to decrease our negative impact on the environment;
- ❑ Because we enjoy beautiful grounds, we will develop more accessible parking for services and big events and explore additional uses for our grounds;
- ❑ Because our projected moderate annual increase in both membership and contributions will require leadership, we will invest in leadership programs and service opportunities.
- ❑ Although we are currently financially stable with an operating budget supporting current activities, we will recognize and meet future challenges to financially sustain this growth. Concurrently, we will implement strategies to increase the Endowment Fund.

Below are the specific goals set forth in this plan. These are divided into several broad topics: growth, communication, social action, facilities, and finance. Many of the goals have several steps and some will be measured against specific benchmarks also listed below. Following these five sections, we discuss how to finance this plan.

GROWTH

This section of the strategic plan addresses programming in the largest sense, including worship, lifespan religious education/faith development, community building, leadership development, and other elements of growth.

Growth Goal #1: The Board of Trustees will explore options for increasing worship opportunities with a second service, on- or off-site as well as additional programming to meet the needs of the membership.

Step:

- A. By June 2008, the Board will have piloted at least four second-service activities (on-site or off-site) and also have explored other opportunities for off-site services and programs

Growth Goal #2: The church community will increase the membership by 6% per year for the next three years (2008, 2009 and 2010).

Steps:

- A. By September 2008, the Membership Coordinator in consultation with the Clerk and Treasurer will establish specific means for counting members, friends, pledge units, and attendance.
- B. By September 2008, the Membership Coordinator will develop strategies to meet this goal. Quarterly, the Membership Coordinator will report to the Board on membership numbers and trends.
- C. By September 2008, the Membership Coordinator will develop a strategy to increase membership, with particular emphasis on attracting youth and persons from diverse backgrounds.
- D. By December 2009, the Board will develop a committee to initiate antiracist and anti-oppression training as a congregational activity; the congregation will undertake a process to renew its status as a "welcoming congregation."

Growth Goal #3: The Board will develop a prioritized staffing plan.

Steps:

- A. By June 2008, the Board will determine future funding levels and responsibilities for the Bookkeeper and Factotum positions.
- B. By June 2009, the Board will issue a future staffing plan. This plan may include a long-term goal of changing the current part-time secretarial position into a fulltime administrator and/or communication director position with expanded authority to manage office functions and staff.

Growth Goal #4: The Board will request the Committee on Ministry to clarify and strengthen the process for addressing conflict within the congregation.

Steps:

- A. During the next three church years, the Religious Services Committee, those responsible for the adult and children's religious education programs and the Forum, and the Minister will find ways to highlight various belief systems with the intent of broadening members' and friends' awareness of various beliefs. Forums on differences might be about democratizing the congregation. The Board will assign a group (e.g. the Religious Services Committee, the Committee on Ministry) to administer a survey in the spring of each year to evaluate the effectiveness of these efforts. The board will receive the results of this survey in September of 2008 and June of 2009 and 2010.
- B. The Committee on Ministry will receive annual training on conflict mediation. Completion of such training will be reported by June of 2008, 2009, and 2010.
- C. Any unresolved issues faced by the Committee on Ministry will be brought to the Board for final resolution.
- D. By June 2008, the Committee on Ministry will clarify its operations and results in reports to the Board.
- E. By June 2008, the Board will consider identifying a "Voices" group to offer opportunities for listening and sharing.

COMMUNICATION

Goals 1 – 7 of this section are dedicated to elevating the profile of our Unitarian Church within the Quad City faith community and the community at large. Goal 8 addresses internal church communications.

Communication Goal #1: The church will develop and carry out a survey or other tool to measure public awareness of the church and its outreach in the greater Quad City community.

Step:

- A. By September 2008, the Board of Trustees will appoint a taskforce or community partner to gather data on community awareness of our church and attitudes toward it.
- B. By December 2008, the task force or community partner will present a written report to the Board on their findings.

Communication Goal #2: The church will create and incorporate a logo and typeface (brand mark) for use in all written and Internet communications.

Steps:

- A. By May 2008, the Communication Committee will put out a call for proposals and create a final list of images/text and will present this list to the Board for approval.
- B. By June 2008, the Board will select the final images to be utilized and will coordinate with church staff to integrate the new branding into publications and web presence.

(Note: Congregational feedback will be incorporated into the selection process at the preliminary "short list" stage and, at the discretion of the Board, at the final selection stage.)

Communication Goal #3: The Board will ask the Webmaster and Internet Committee to redesign the current church website as needed to make it interactive, useful, and attractive to web users. The Webmaster and Committee will create a process for gathering guidance and expertise from knowledgeable members and friends of the congregation to ensure that the resulting web site is as helpful, complete, and accessible as possible.

Steps:

- A. By September 2008, we will implement the redesigned website.
- B. Quarterly, the Membership Coordinator will report to the Board on the number of new visitors who cite the website as their initial point of contact.

Communication Goal #4: The church will create a liaison program with local universities and colleges wherein church members who are employed as faculty or staff at these institutions will volunteer to serve as "touchstone" contacts on campus for students interested in liberal religion in general or the Unitarian Church in specific.

Steps:

- A. By September 2008, we will have this program in place.
- B. The Membership Coordinator will report regularly to the Board about new visitors who cite the contact liaisons as their initial points of contact.

Communication Goal #5: The church will evaluate its print and Internet advertising of events. Maximizing exposure may involve reviewing previous proposals for advertising and creating a budget with significant dollars.

Step:

- A. By September 2008, the Publicity Committee, with support of Communication Committee, will evaluate current practices and propose any changes to the Board for approval.

Communication Goal #6: The church will develop and implement regular all-church community service projects.

Step:

- A. In 2008, we will carry out at least one event. In 2009 and 2010, we will hold three to four events per year. The appropriate committee will evaluate each year's events and make recommendations for future improvements.

Communication Goal #7: Starting in 2008, the adult and children's religious education committees will expand programming to include a series of joint events with Churches United, Temple Emmanuel, and/or Edwards Congregational.

Step:

- A. The Adult RE Committee or RE Director will report attendance and success of joint events to the Board at regular intervals.

Communication Goal #8: The Board will appoint an ad hoc committee to make recommendations for simplifying and improving our church committee structure with the end goal of improving communication. This plan should include leadership and reporting functions.

Steps:

- A. This committee will likely need to:
 - (1) Research other committee structure models (e.g. Des Moines),
 - (2) Create a proposed plan for our congregation's future committee structure to submit to the Board,
 - (3) Work with the Board in implementing any recommendations.
- B. By December 2008, the Board will implement the new structure.

SOCIAL ACTION

In this section of the plan, we address social action and social justice.

Social Action Goal #1: We will elevate our social justice/action profile within the Quad City faith community and the broader community.

Steps:

- A. By June 2008, we will establish a volunteer social justice /action facilitator who will assist the leadership in coordinating activities within the community.
- B. By December 2008, the facilitator will complete and circulate a survey of the congregation on information availability and access to social action activities facilitated by the church community.
- C. By December 2008, the congregation will take public action (bear witness) on at least one significant social justice issue.

FACILITIES

The strategic plan addresses facilities on two levels. Our first priority is to repair our current buildings and grounds and to ensure that these are carefully maintained. Our second priority is to initiate a lay-led planning process that explores various options to accommodate projected growth in membership and staff.

Facilities Goal #1: We will evaluate the status of the physical plant and grounds to anticipate future needs.

Steps:

- A. By June 2008, we will form a committee to complete this assessment of the physical plant. This committee will report to the Board by December 2008.
- B. By June of 2009, we will have a plan for developing the grounds for use by additional outside groups. This may include the creation of an area for weddings and additional plantings, benches or meditative walking paths.
- C. By September 2009, the Board will appoint a committee to investigate the process of becoming a "green sanctuary." This committee will report to the Board by January 2010.
- D. By June 2010, we will repave the parking lot.

FINANCE

This section of the strategic plan outlines goals and benchmarks related to future fundraising and finance policies. It does not describe how the plan will be financed.

Finance Goal #1: The Board recognizes the need to be more intentional in educating the congregation around finances and stewardship.

Steps:

- A. By the end of May 2008, the Board will form a team to lead an effort to help the congregation grow in (1) its understanding of stewardship and (2) embracing the importance of it.
- B. By the end of June 2009, the Stewardship Leadership Team will prepare a three-year plan outlining its intended activities including classes, speakers, articles, and recommended readings.
- C. During each of the three plan years, the Board will ensure that the Annual Budget Drive team has the personnel, the education and the resources they need in order to lead high-profile, effective annual budget drives.

Finance Goal #2: By the September 2008, the Finance Committee will work with the Board and relevant others to create a rolling three-year proposed budget consistent with this Strategic Plan.

This plan will address the following considerations:

- 1) Fundraising income should be used for special projects rather than for balancing the budget.**
- 2) It is important to pay our staff fairly and to provide sufficient resources for staffing, building operation and maintenance, and program expenses consistent with our plan to be a vibrant congregation.**

The Board recognizes that there is a tension between these two goals. The plan will address how to make progress towards the first goal while achieving the second.

Finance Goal #3: The Endowment Committee will actively seek and secure planned gifts and cash gifts for our endowment.

Steps:

- A. By the end of December 2008, the Endowment Committee will create and implement a plan to raise congregational awareness of the Endowment.
- B. The committee will find a way to highlight those who have supported the Endowment with inclusion in their estate plans or with a cash gift and will openly encourage others in the congregation to join them.

Benchmarks:

- A. By the end of December 2009, the Endowment will grow at least 5% in size from its balance at the beginning of 2009, through receipt of cash gifts, in addition to any growth from investments.
- B. The Endowment will continue to grow an additional 5% each year thereafter from receipt of cash gifts and estate gifts, in addition to any growth from investments.

Finance Goal #4: The Board will continue to support the necessary systems and procedures that ensure the financial integrity of our church.

Steps:

- A. By the end of March 2008, the Board shall reactivate the Audit Committee.
- B. By the end of May 2008 the Audit Committee shall resume its annual audits and shall recruit additional members as needed to provide for an ongoing committee.

HOW WILL WE FINANCE THIS PLAN?

The finances of our congregation are healthy. The members of the congregation have been generous in contributing funds and in contributing their time to help raise funds. Our congregation is adequately staffed for our current size and we have made good strides in recent years to increase the pay and benefits of our staff. Every year we need to make choices as we finalize our budget because we always have more ideas than we are ready to fund. However, historically, we have been able to make choices that support our continued growth in vitality.

As our congregation continues to grow in size and in programming vitality, we will continue:

1. To want to add to our staffing capacity, either by increasing the number of staff or the hours of the current staff.
2. To continue increasing the salary of staff to keep up with inflation and to reward their experience.
3. To have ideas for how additional funds could enhance our programming.
4. To increase funds for operating expenses as the cost of various items increases.

Therefore, the need for more money each year will not go away.

It will be important to prioritize as we make decisions on the budget each year. Which staff person should be increased first when we can't afford to increase more than one at a time? Should funds be spent on advertising, on leadership training, or on purchasing supplies? This plan seeks to provide some priorities.

As the congregation understands the priorities, it will continue to be generous in its giving. Fundraisers currently supplement congregational giving, but there is a limit to the number of fund raising efforts that the congregation is ready to support with its energy before beginning to feel besieged. Some additions to the budget will need to wait until a future year, and it is the work of this plan to help guide those decisions.