

# UUCSS Strategic Plan

July 2012-June 2017

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**Deepening Our Roots; Spreading Our Branches;  
Reaching Toward Justice.**



## Advice from a Tree

By Ilan Shamir

Stand Tall and Proud  
Sink your roots deeply into the Earth  
Reflect the light of a greater source  
Think long term  
Go out on a limb  
Remember your place among all living beings  
Embrace with joy the changing seasons  
For each yields its own abundance  
The Energy and Birth of Spring  
The Growth and Contentment of Summer  
The Wisdom to let go of leaves in the Fall  
The Rest and Quiet Renewal of Winter  
Feel the wind and the sun  
And delight in their presence  
Look up at the moon that shines down upon you  
And the mystery of the stars at night.  
Seek nourishment from the good things in life  
Simple pleasures  
Earth, fresh air, light  
Be content with your natural beauty  
Drink plenty of water  
Let your limbs sway and dance in the breezes  
Be flexible  
Remember your roots  
Enjoy the view!

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## Executive Summary

This strategic plan is the second one prepared by UUCSS through an appreciative inquiry process with participation from the congregation, and is a guide for church leadership and others who are interested in helping UUCSS achieve its goals. The Board of Trustees approved this plan in May 2012 after a two-month discernment process during which the UUCSS Program Council and members also gave further feedback. Thus, this plan is owned by the congregation and will enable our lay and professional leadership to stay focused on shared priorities, set budgetary goals, and evaluate new proposals and opportunities that may arise in the future. It is meant to be a flexible guide, understanding that the future may present unexpected circumstances that will need to be considered.

The central piece of this plan is Our 5-Year Vision (section 2); those who are not able to read this document in its entirety are encouraged to start with section 2, which provides our Vision Statement, as well as a description of who we are, where we have been, and our goals for the next five years. In summary, these are:

### ***Vision:***

*We are a large and vibrant spiritual community. We are welcoming, and are continuously enriched as we grow in diversity. We seek justice, and therefore work with energy and love to transform our selves, our community and our world. Together, we have amazing impact.*

For more than the past decade, UUCSS has been engaged in a transformative process and is now poised to reach several important long-range goals. From the congregational Appreciative Inquiry Summit, five themes emerged which are the pillars of this Strategic Plan. These themes are to:

1. *Cultivate a rich spiritual life and build community connections*
2. *Become a large, richly diverse congregation*
3. *Create attractive spaces that work for our worship, program and staff needs*
4. *Put our faith into action*
5. *Be environmental stewards*

This document provides further details about the specific goals and outcomes within each of these priorities. The tables in the appendices also provide a roadmap of suggested action steps for achieving the desired outcomes within each of the five thematic goals.

A central goal for the next five years is to attract new members who share our desire to live life deeply through joyful and spiritually-centered worship, educational programs and fellowship. Through growing in both numbers and diversity, we will deepen our understanding of the world and ourselves, increase our connection to the web of existence, and share Unitarian Universalist principles and the many gifts our church community has to offer to others seeking a church home. We will also continue to support our rich worship and lifespan religious education programming, as well as varied opportunities for connecting in fellowship. We will change our physical space in response to our growing needs and aspirations to ensure that our physical surroundings support spiritual practice and renewal, exceptional worship, gatherings for fellowship and effective workspace for our staff and volunteers.

Recognizing the important contributions of our professional staff and volunteers in making these goals a reality, we will support leadership development within our congregation and professional development for our paid professional staff to ensure that high quality programs and worship services are sustained. We will continue our commitment to being a UUA fair compensation employer.

UUCSS has a proud history of social action, and during the next five years we will continue and expand our engagement as a spiritual community in issues of peace, justice and environmental stewardship. We will also seek to expand our participation in the Unitarian Universalist movement and its causes.

This plan includes a strategy for putting the right resources in place to achieve our goals, including adequate professional staff, lay leadership and volunteers, financial support and effective communications. We envision that UUCSS members and friends will continue to generously support the vision of this strategic plan through a variety of giving opportunities and fundraising activities, creating sufficient income to cover excellence of programs, worship, leadership development, volunteer support and capital investments. We also intend to maintain our status as a fair share congregation with annual contributions to the UUA.

Our goals in communications are to develop compelling external communications that continuously raise awareness about our values, our work as a faith community and opportunities for joining us. We will use multiple modes of communication to ensure that members and the community know about social action initiatives that UUCSS is engaged in, as well as what resources and programs are available for them at UUCSS, and where to turn for help when needed. Finally, we expect that the church membership will be aware of the major issues that the church leadership and staff are working on and how they can get more involved or provide input.

The UUCSS leadership requested that this plan include guidelines for monitoring its implementation, and specific actions for doing so are included in section 5. Critical among these actions, we expect that the Board of Trustees, Program Council and professional staff will review progress against the goals and outcomes described in this plan annually to identify and celebrate achievements, discuss priorities and prepare annual plans and targets for the forthcoming church year. Additionally, the Congregation will be kept informed about key achievements and milestones on a regular basis through a variety of means.

# 1. Introduction

This Strategic Plan is organized into five sections, starting with an introduction that describes the plan's purpose, how it was developed and who we are at UUCSS. Section 2 articulates our 5-year vision, and Section 3 provides further details about the outcomes that we are working towards as a community in order to achieve that vision. Section 4 describes the resource-building strategies (staff, volunteers, financial/fundraising and strengthened communications) that will be needed to achieve this plan's vision and actions towards meeting our resource needs. Section 5 provides suggestions to the church leadership for monitoring and reporting progress against this plan back to the congregation.

## **What is the Purpose of this Strategic Plan?**

This strategic plan is the second one prepared by UUCSS<sup>1</sup>, and is a guide for church leadership, and others who are interested in helping UUCSS achieve its goals. Through a process of appreciative inquiry in the fall of 2011, the congregation identified its hopes and dreams for our community and this document aims to fashion those into a plan that is owned by the congregation and enables our lay and professional leadership to stay focused on shared priorities, set budgetary goals, and evaluate new proposals and opportunities that may arise in the future.

We anticipate that the Board of Trustees and the Program Council will refer to it on an ongoing basis as they set priorities and carry out the expansive work of the church within the limits of our resources and abilities. We expect that it will be useful as leaders evaluate competing desires in the community, allowing us to stay focused on our long-term vision. Thus, this plan is meant to be a flexible guide, understanding that the future may present unexpected circumstances that will need to be considered. We recommend that the Board of Trustees and the Program Council review the plan regularly.

This plan is also meant as a guidepost for the Board to stay focused in carrying out its discernment and fiduciary responsibilities. The Board will also be responsible for monitoring the congregation's overall progress against this plan and acting on the components that fall within its leadership responsibilities. This plan also offers an initial roadmap for the Program Council and professional staff, who will be responsible for day-to-day implementation. While our vision and desired outcomes are shared UUCSS congregation responsibility, the plan assigns responsibility to committees and individuals for developing implementation steps for each outcome.

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<sup>1</sup> The achievements of the first UUCSS Strategic Plan (January 2007 – June 2012) are summarized in Appendix B.

## 2. Our 5-Year Vision (July 2012 – June 2017)

### ***Vision:***

*We are a large and vibrant spiritual community. We are welcoming, and are continuously enriched as we grow in diversity. We seek justice, and therefore work with energy and love to transform our selves, our community and our world. Together, we have amazing impact.*

For more than the past decade, UUCSS has been engaged in a transformative process and is now poised to reach several important long-range goals. During our October 2011 All-Congregation Appreciative Inquiry Summit and planning work that followed, we identified five themes within our vision for the next five years. These are to:

- *Cultivate a rich spiritual life and build community connections*
- *Become a large, richly diverse congregation*
- *Create attractive spaces that work for our worship, program and staff needs*
- *Put our faith into action*
- *Be environmental stewards*

These themes reflect our strong desire for continuing the journey we've been on, while also deepening our spiritual practices, becoming more connected to and benefiting from the culturally rich community that surrounds us and continuing and expanding our initiatives for justice. Specific goals and outcomes within each of these elements are described throughout the full Strategic Plan 2012-2017 document.

**We have a strong foundation from which to build.** We are committed to Unitarian Universalist principles and values. We welcome and accept all who come, as they are. Our community supports each individual's search for truth and wholeness and offers worship and programming that furthers us on our individual and collective journeys. We strive to ensure that all among us feel a deep sense of acceptance, being mindful of the diversity of paths on which we travel, and of our values in maintaining right relations with one another that are expressed in our covenants.

We welcome the positive transformation that occurs from being part of a richly diverse community committed to spiritual seeking and joyful living. We regularly share and celebrate the gifts this diversity brings to our church home.

**A central goal for the next five years** is to attract new members who share our desire to live life deeply through joyful and spiritually-centered worship, educational programs and fellowship. We seek to continue our growth as a diverse congregation, with the aspiration of increasing our membership by 25-30% by 2017. Our desire is that the composition of our larger and more plural congregation will better reflect the many dimensions of diversity (including racial, cultural, ethnic, spiritual, ability, generational, sexual orientation, political affiliation and socio-economic diversity). Through growing in both numbers and diversity, we will deepen our understanding of the world and ourselves, increase our connection to the web of existence, and share Unitarian Universalist principles and the many gifts our church

community has to offer to others seeking a church home. As part of this process of transformation, we will update our church's standing mission and vision statements to better reflect the changing tapestry and dreams of our congregation.

During the next five years, we will also continue to support our rich worship and lifespan religious education programming, as well as varied opportunities for connecting in fellowship. Our community will continue to be a safe space where all who wish can explore their own spiritual path, experience personal affirmation and put their beliefs into action. We will expand our ability to minister to those in need, both in our church community as well as the community surrounding us.

Finally, we will change our physical space in response to our growing needs and aspirations. We will care for our existing buildings and grounds to maintain them for the future. We will strive to have our physical surroundings support spiritual practice and renewal, exceptional worship, gatherings for fellowship and effective workspace for our staff and volunteers.

**Our paid staff and volunteers are essential resources for reaching this vision.** We acknowledge the incredible value received from both, and how blessed we are with such talented and committed people who have been so instrumental to our success.

***Our goal during the next five years*** is to continue to support leadership development and the emergence of new leaders within our congregation, as well as opportunities for our paid staff to grow professionally to ensure that high quality programs and worship services are sustained. We will continue our commitment to being a UUA fair compensation employer.

**UUCSS has a proud history of social action.** Ever mindful that we are part of an interconnected web of existence, over the years we have actively sought opportunities to support peace, justice, and environmental stewardship in our world. All this we have done with open hearts, finding ways to have fun, enjoy fellowship, and make joyful music to relay our message for justice to the world.

***Our goal for the next five years*** is to be actively engaged as a spiritual community in issues of peace, justice and environmental stewardship. We will continue our engagement in issues of priority to our congregation, such as equal rights for lesbian, gay, bisexual, transgender and questioning people (LGBTQ) and environmental stewardship, while seeking out new opportunities that support our desire to serve the needs and rights of all on both a global and local scale. We will develop a process for choosing issues of priority that is inclusive and transparent.

We will encourage and offer our many members and friends opportunities for personal and spiritual fulfillment by channeling their unique gifts for social good through volunteerism and charitable giving. We will seek to be ever mindful of both the rewards and the challenges in doing this work, and find new ways to support volunteers in balancing these commitments with other priorities in their lives. We will also continue to be a fair share congregation within the UUA, and seek to expand our participation in the Unitarian Universalist movement and its causes.

### 3. Our Plan for Making this Vision a Reality

This section provides details about the five themes or elements of this Strategic Plan, including goals and outcomes that will be the focus of this Strategic Plan for 2012-2017.

#### **Theme 1: Cultivate a rich spiritual life and build community connections**

##### **Goals:**

We are a vibrant and energetic spiritual destination, attracting a rich diversity of people. UUCSS, both on its own and in concert with other UU congregations, is a vital resource for our local community and the region, providing programs, events, and support on our property and in the community.

The vibrant music program at UUCSS offers a wide range of meaningful opportunities for congregational participation and is also actively engaged with the outside community.

##### **Outcomes:**

1. We have religious education and other programming throughout the week that reflects and extends our rich diversity;
2. We will add a youth group for middle-schoolers to our religious education program;
3. We support in-depth, individual spiritual development;
4. People of all ages participate in music ministry as a result of an expanded variety of vocal and instrumental groups (e.g., adult choir, children's choir, middle school and YRUU ensembles, contemporary vocal ensemble, house band, small instrumental and vocal ensembles)
5. The UUCSS music program is actively involved in outreach and collaboration with other UU congregations, musical groups in the community, and the general public;
6. Many members are trained as lay ministers and serve as a caring presence in the church to serve our growing congregation, whether as part of the lay ministry team or otherwise;
7. Multicultural awareness is built into our model to help inform our care and connections;
8. UUCSS takes an active role in spreading the word about Unitarian Universalism and about UUCSS, and supporting the growth of Unitarian Universalism in the region, the nation, and the world.

#### **Theme 2: Become a large, richly diverse congregation**

##### **Goals:**

UUCSS is a truly diverse congregation where all are welcomed to participate in every aspect of church life. We celebrate the many dimensions of diversity including racial, cultural, ethnic, spiritual, ability, generational, sexual orientation, political affiliation, and socio-economic. Our membership better reflects the larger community in which we live, where people of many races and ethnicities make up the majority of the population and no single racial group is a majority. This enriches our lives and helps us transcend our differences through respectful, loving dialogue and shared experiences.

Our initiatives include frequent programs about race and cultural issues within the UUCSS community, diverse and joyous music, religious education and other programs and activities, and ongoing development of a multiracial cadre of church leaders.

**Outcomes:**

1. We increase our membership by 25-30% over the next five years such that the composition of our larger and more plural congregation better reflects the richness of our diverse community;
2. The capacity and systems for tracking, managing and continuing to integrate our efforts around diversity, outreach and membership growth are in place and functioning well;
3. Programming at UUCSS serves as a model to other UU congregations striving to become more multicultural;
4. Multicultural elements are incorporated into every aspect of church life.

The Growth Trends chart in Appendix C illustrates our goals for growth in numbers. To derive these projections, we are assuming steady growth in our membership of about 5% per year for the next five years. We think this level of growth in numbers will be necessary if we are to achieve our long-range goal of becoming a truly plural congregation where no single racial group is in the majority. We also expect that these goals will continue to be supported by our involvement in the Threshold Congregation program, which we began in 2011. The Strategic Plan augments most of the goals and objectives toward growth that we have established as a Threshold Congregation. Led by the UUA's Central Eastern Regional Group, the Threshold Congregation program is a three-year program in which selected congregations share best practices and resources for achieving specific growth goals.

We believe this rate of growth will be necessary to build a solid foundation for cultivating emerging lay leaders and volunteers to support our programs, community connections and social action agenda, and for financing the dreams that we have envisioned in this Strategic Plan. In that regard, the current ratio of pledge units to the total number of members is 66%, and we have assumed that this ratio will hold up over time. , UUCSS enjoys support from friends who are former members who have either moved away, and from visitors who have not yet made the commitment to become members. Since most of our financial support (and volunteer hours) is derived from members, we have assumed just 2% growth in friends.

Over the past five years UUCSS has followed a strategy of staffing for growth. Some aspects of this plan will require an expansion in the hours for some of our professional or volunteer staff and existing vacancies (especially the Membership Coordinator) will also need to be filled; however we believe that UUCSS has done well in staffing for growth, and for the most part, adequate professional staff will be in place to support this growth plan in the near and medium-term given the addition of a permanent Assistant Minister position beginning in 2012-13. Our congregation has also begun to identify and put some of the key systemic and institutional changes in place to support growth (new membership guidelines and processes, a renewed Annual Budget Drive, volunteer coordination, evaluating our space needs, etc). The continuation of much of this work in systems and institutional change will be a critical factor for succeeding in this growth plan.

### **Theme 3: Create attractive spaces that work for our worship, program and staff needs**

#### **Goals:**

Our welcoming, comfortable and beautiful buildings and shelter contain the life and work of our church. Their design and organization provide a flexible functionality that enables congregants and visitors to engage in meaningful worship, ritual, and social activities.

UUCSS members and friends feel a shared responsibility and act as caring stewards of the buildings and grounds by providing financial and physical contributions to their ongoing upkeep.

Long- and short-term decisions are made intentionally and courageously with an eye towards practicality, sustainability and environmental responsibility.

Under the 2007-2012 Strategic Plan, a strong foundation has been laid to achieve these goals. In anticipation of changes in our buildings and grounds necessitated by growth in membership and other changes at UUCSS, and to assist in planning for the future, in 2010 the Board of Trustees appointed a Building Review and Planning Committee. This committee has been working tirelessly to better understand future needs and evaluate suitable options to present to the Board and the congregation. The committee's work has progressed well, is ongoing, and now will be further informed by the priorities set out in this plan. The Building Review and Planning Committee and the Board of Trustees may also need to consider as some other longer term aspirations of the congregation that extend beyond this five year plan as this work moves forward.

#### **Outcomes:**

1. A detailed business plan for effective rental use of our spaces, including trade-offs and costs, is developed, evaluated and a revised plan put into place;
2. We have created and put into place a concrete plan and process for implementing and financing a Building Program that articulates our short-term, medium-term and long-term priorities and associated costs for achieving more useable community spaces for our worship services, staff, programs and community outreach activities and events. This plan will address the following priorities which were identified by the Congregation during the appreciative inquiry process, including:
  - Adequate, comfortable, secure and handicapped-accessible space in which staff and volunteers are able to work;
  - Abundant, comfortable space for lifespan RE, YRUU, meetings, and programs that nurtures community, creativity, and learning;
  - State-of-the-art performance space in the Sanctuary enhances the quality of the musical experience during worship services;
  - State-of-the-art performance space in the Community Building or other community space provides opportunities for musical events involving the congregation and the wider community. UUCSS storage areas are well-organized so that members know where to find things, are responsible for maintaining storage areas, and respect each other's materials

- The UUCSS buildings are safe and secure. Outdoor spaces are attractive and well-maintained to invite spiritual reflection and contemplation such as an improved meditation garden, restoration of the nature trail, fountains or other natural features.
  - Beautiful, tranquil and clean indoor spaces for use as a chapel or for alternative worship, meditation, yoga, or other spiritual activities.
3. There is sufficient parking to meet the needs of our growing congregation and outreach activities; options for holding major events off-campus are identified and put into place where parking solutions are not practicable (such as the Fellowship dinner).
  4. Near-term and long-term upgrades to our campus for accessibility and sustainability are completed.
  5. There is a responsive and sustainable process for reporting and carrying out repair and maintenance needs and the upkeep of our grounds, gardens and outdoor spaces and features.

#### **Theme 4: Put our faith into action**

##### **Goals:**

Our church plays a leadership role in social action areas consistent with UU principles. Our members live out our values of justice and compassion within our congregation and in the larger world. Social action energizes and empowers people to make a difference.

To this end, we target a few issues that reflect the interests and matter deeply to our diverse members and address them over a sustained period of time in all aspects of our church life, including worship, religious education (RE), and program committees. We foster shared commitment and the growth of social action leaders within all generations of our congregation. Within five years, the broader community will see us as a social action leader.

##### **Outcomes:**

1. UUCSS makes a difference and is recognized as a leader on a few core issues that align with our UU values and reflect the passions, interests and experiences of our diverse congregation;
2. Our children, youth and adult members are all aware and knowledgeable about UUCSS's chosen core social justice issues, impassioned about them and have participated in making a difference;
3. UUCSS reaches out to our local community to help people in need, enacting our commitment to justice, equity and compassion. There is congregation-wide involvement in these efforts;
4. UUCSS creates multi-generational volunteer opportunities so that the congregation sets goals and performs a significant number of hours of volunteer work outside of the church each year.

## **Theme 5: Be environmental stewards**

### ***Goals:***

UUCSS is conscious of its impact on the environment and is committed to making green decisions as often as possible. We use environmental best practices to reduce our energy output, decrease our energy costs and enhance our surrounding environment.

As of the writing of this plan, our application to become a Green Sanctuary (GS) has been completed and submitted and we anticipate certification. Certification in the program will serve as a structure for our overarching goal of environmental stewardship. It is a comprehensive program, addressing the arenas of worship, religious education, sustainable living and environmental justice. The structure of the program incorporates all four of the other theme groups of the strategic plan and reminds us that environmental stewardship is one of our spiritual values. By grounding our environmental work in our spiritual life and values, we will have the energy and commitment to achieve our goals.

### ***Outcomes:***

1. We lower our net energy consumption;<sup>2</sup>
2. Our buildings are more environmentally conscious spaces;
3. UUCSS increases its community outreach/involvement in relation to environmental stewardship in our community and region;
4. UUCSS continues its activism on the issue of climate change by work at all levels: individual, congregational, community, national, and international.
5. We put into place practices for responsible management of rainwater on UUCSS property and grounds;
6. We monitor and maintain our Green Sanctuary certification.

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<sup>2</sup> UUCSS already has an agreement in place for 100% wind energy. Thus, other options for continuing to lower net energy consumption will be explored.

## 4. Building the Right Resources to Realize this Vision

### A. Professional Staff, Lay Leadership and Volunteer Development

**Goals:**

UUCSS's growing and diverse membership have the opportunity to find a place to use their gifts and talents in the volunteer ministry that makes the life and work of the church possible. All involved in volunteer ministry receive training and support to ensure this work is intentional, meaningful, productive and spiritually connected.

UUCSS maintains its commitment to being a fair compensation employer, and regularly celebrates and appreciates the contributions of its paid staff.

**Outcomes:**

1. A process is in place for more effective volunteer recruitment, training and ongoing support;
2. UUCSS reviews compensation packages (salary and benefits) of its professional staff annually against the UUA fair compensation guidelines;
3. UUCSS supports the development of its professional staff by offering regular opportunities for professional and spiritual growth and work-life balance;
4. The UUCSS Board annually reviews professional staffing and volunteer requirements to ensure the goals of this Strategic Plan are being met, and that church administration and systems remain as efficient and effective as possible as membership grows. We will pay particular attention to the growing need to professionalize support for human resources, property and finance as we move forward;
5. UUCSS provides support for delegates and emerging leaders in its membership to attend GA and other leadership development opportunities offered by the UUA or other local organizations;
6. UUCSS provides adequate support to its volunteer leaders and staff to attend a basic (no-frills) annual leadership retreat, with the aim of covering 100% of costs by 2017.

### B. Fundraising to Carry out our Vision and Mission

**Goals:**

The congregation plans for the future financial needs of the church with foresight, realism and courage.

UUCSS members and friends continue to generously support its mission, vision and strategic plan through a variety of giving opportunities and fundraising activities creating sufficient income to cover ongoing investment in the excellence of programs, worship, leadership development, volunteer support and capital investments.

UUCSS maintains its status as a fair share congregation with annual contributions to the UUA.

**Outcomes:**

1. The Board of Trustees is educated about effective capital campaign strategies and a consultant is hired who is able to provide timely advice and support to plan and launch the campaign within an agreed timeframe;
2. The Capital Campaign is successfully planned and completed to raise sufficient funds to finance the Space that Works vision of this plan and other long-term needs;
3. Annual financial projections are completed and used as a planning tool for future Annual Budget Drives;
4. Financial impacts of programs are considered as a regular part of planning;
5. Annual Budget Drives are successfully completed with sufficient resources to fund the annual operating and recurring costs associated with this Strategic Plan;
6. A plan for promoting, growing and managing the UUCSS endowment is put into place and members are regularly provided with information about how they can contribute;
7. Other fundraising activities and events (auction, grocery scripts, rummage sale, etc.) are sustained, and new fundraising activities (grant-writing) and events are developed;
8. Five year projections are completed and reviewed by the Board of Trustees at least every three years in order to assess the longer-term financial health and commitments of UUCSS.
9. Recognition of our members and friends' generous gifts of time, money and talent is part of the cultural fabric of UUCSS.

**C. Strengthening Communications****Goals:**

UUCSS has developed a strategic vision, messaging and new process for more consistent, compelling and pro-active external communications that continuously raises awareness in the community, nation and world about our values, our work as a faith community and opportunities for joining us; sufficient professional staff support is provided to these efforts.

Multiple modes of communication ensure that the community knows what resources and programs are available for them at UUCSS, and where to turn for help when needed.

Members, friends and the community are aware of the social action initiatives that UUCSS is involved in, including major achievements and milestones.

The church membership is aware of the major issues that the church leadership and staff are working on and how they can get more involved or provide input. Decisions made by the church leadership are communicated to the membership in a timely manner through multiple channels of communication.

**Outcomes:**

1. An external communications strategy is developed and sufficient professional and volunteer resources for implementing it are in place;
2. The church website will be revised to incorporate a Content Management System (CMS) and blog item sharing via social media;
3. A communications committee is formed, with responsibility for developing and maintaining a comprehensive plan for communications including oral and written

Sunday announcements, Uniter, weekly all-church email, bulletin boards, Yahoo groups, social media (ex. Facebook and Twitter) and the web page;

4. The communications plan clearly identifies staff responsibility for communications;
5. The communication plan includes guidelines and policies for congregational communication;
6. Instructions and input forms facilitate publicizing of church events.

## 5. Monitoring Progress Against this Strategic Plan

This Strategic Plan is a living document, a framework for focusing our energies and resources that has been drawn from the hopes and aspirations of the Congregation and through consultations with UUCSS's leadership. The UUCSS leadership requested that this plan include guidelines for the monitoring of this plan's implementation, which are provided below.

### Board of Trustees:

- All new appointees to the Board of Trustees will be provided an orientation on this Strategic Plan within the first month of their appointment;
- The Board will use this plan as a key guidepost during the annual budgeting and discernment process;
- The Planning Committee will complete a review of this Strategic Plan at the beginning of Year 3 (September 2014) and the end of Year 4 (June 2016) and report back to the Board on the progress towards meeting the goals as well as current challenges or new opportunities affecting outcomes. Based on this report, the Board will discern any necessary changes in the proposed outcomes, timing or financial or human resource implications;
- The Board will organize their annual meeting calendars to include 2-3 study meetings per year dedicated to exploring in-depth one or more of the themes of this Strategic Plan. These study meetings will be special sessions during which other business will be set aside.

### Program Council:

- All new Program Council appointees and committee members will be provided an orientation on this Strategic Plan within the first month of their appointment;
- Program Council committees and teams will take the goals and outcomes of this plan into careful consideration when preparing their annual budget requests.

### Professional Staff:

- All existing and new professional staff will be provided with a copy and an orientation session on this Strategic Plan. Going forward, professional staff should also be asked to align their annual performance objectives and work plans with this Strategic Plan;
- Professional staff may also review progress against the goals and outcomes described in this plan more frequently during staff meetings. It is also recommended that the goals and outcomes of this plan be taken into consideration when preparing staff annual performance goals, and during staff performance reviews.

### All Leadership:

- The Board of Trustees, Program Council and professional staff will review progress against the goals and outcomes described in this plan annually to identify and celebrate achievements, discuss priorities and prepare annual plans and targets for the forthcoming church year. It is recommended that this take place during the annual leadership retreat (in September);
- The Board President, Senior Minister and Program Council President may wish to write a joint Annual Letter to the Congregation celebrating achievements and setting out the leadership's priorities for the new church year;

- The Congregation will be kept informed about key achievements and milestones on a regular basis through a variety of means. Some possible ways for doing so include: regular columns and feature articles in the Uniter, all-church email and on the website; Crossroads Coffee sessions and other special feedback sessions; annual reports and updates at the Congregational Annual meeting in June; information distributed during the Annual Budget Drive (ABD).