

Final Summary of 2018 Strategic Plan Progress and Recommendations

The Strategic Plan was developed in 2018. A group of 9 people helped create this plan that would: practice covenant, invest in congregational vitality, nurture the hopes and serve the needs of our community and world. The Vision of the Plan was: **Vision:** By 2023 we will be an inclusive, cohesive, participatory and resilient congregation where we cultivate strong, covenantal relationships, live from plentitude and are inspired to reach out to the world.

Oversight, Periodic Review, and Update

The 2018 Strategic Plan is a living document. The Plan can and should be reviewed, refined, and improved with policies and/or procedures for modifications,

The Board and Team Council will be responsible for oversight, review, and update of the Strategic Plan for Year One and periodic reports to the congregation.

In Years Two and beyond, the Team Council will monitor progress, make recommendations, and provide periodic reports to the board and congregation.

The goals, strategies, and suggestions in this document are largely team/committee-based and their implementation will mostly come from and be accomplished by the teams/committees.

What the Board and Team Council did in 2022-23

- Developed a 4 phase Strategic Plan Updating Procedure
- Developed a position called the Strategic Plan Coordinator to help track goal progress
- Established with Team Council what goals had been achieved, what still needed to be worked on and what did not seem probable to achieve at this time or with the connected team.
- Focused on 4 Goals from Strategic Plan that teams would work on and provide monthly report for January – May. Those 4 goals were:
 - "Nurture Hopes and Serve Needs: Social Justice for a Program Congregation"
 - "Nurture the hopes and serve the needs of our community and world through Membership and Fellowship Teams for a Program Congregation"
 - "Leadership and Governance: "Foster Leadership Development"
 - "Staffing/Personnel: Become an "Employer of Choice".
- Outcome - showed the many and various ways different teams are providing the congregation with social justice actions, increasing sense of membership and fellowship, working on leadership development and being an employer of choice.
- Developed and streamlined reporting process of team progress to the Board and Team Council.
- Started process of developing an Organizational Chart of Teams/Committees/Groups as part of Team Council.

What the Board and Team Council did in 2023-24

- Reviewed Strategic Plan Goals with proposed updated Vision and Mission statements and modify goals as needed for 2023-2024.
- Had Teams reporting on the Vision and Mission related goals of:
 - Goal 1: To provide service to our congregation, our community, and our world.
 - Goal 2: To promote liberal religious exploration.
 - Goal 3: To foster stewardship, friendship, and shared ministry in our congregation.
 - See statements of Vision and Mission adopted in the 2023 Annual Business meeting below.
- Had Teams/Committees report progress to Board on a monthly basis and then decided to do it on a quarterly basis. One Team/Committee a month would present directly to the Board.
- In November 2023 the Team Council reviewed the original 2018 Strategic Plan Goals and identified – Met or Progressing, Not Progressing, and Relevance of each. All goals were able to be identified under these guidelines and were deemed relevant except for one relating to potential expansion of a specific Team role. This was removed from the overall Strategic Plan report due to non-relevance. Please see grid below for goal progress report.
- In December 2023 the Team Council reviewed the results of the aforementioned grid and determined that the majority of the goals had been met or were progressing, further focusing on the Strategic Plan of 2018 would be postponed.
- Of the goals determined as not being met and still relevant:
 - Staffing and employer of choice – due to ministerial search
 - Growth of financial resources
 - Emergency preparedness
 - Social Justice action
 - Leadership Development was also viewed as one needing additional progression, though some progress has been made.
- Plan for fiscal year 2024-2025 is to:
 - Invite Interim Minister to discuss with Team Council potential methods to achieve more progress on above goals.
 - Start assembling the process for creating a new Strategic Plan that is simplified, connected to UUCS Vision and Mission Statements and have increased Team Council input in creation of attainable goals.
 - Have new Strategic Plan in place no later than fiscal year starting in 2028 (?)

2023 Responses: Communications, Connections, Membership, Worship, Committee on Ministry, Nominating Committee

Goal with Page reference

p.7 "Strengthen the Covenantal Ties within Our Congregation"		
p.9 "Staffing/Personnel: Become an "Employer of Choice".		
p.10 "Lifespan Religious Education (LRE) for a Program Congregation is a Significant and Valued Priority.		
p. 11 "Leadership and Governance: Implementation of Policy Based Governance"		
p.12 "Leadership and Governance: Community Documents for a Program Congregation"		
p. 13 "Leadership and Governance: Foster Leadership Development"		
p.14 "Leadership and Governance: Expand the Portfolio of the Committee on Ministry"		
p. 15 " Leadership and Governance: Strategize and Plan for the Future UUCS."		
p. 16" Leadership and Governance: Grow our Financial Resources, Develop Attitudes of Plenty and Generosity"		
p. 17" Leadership and Governance: Facilities Management for a Program Congregation"		
p.18 " Leadership and Governance: Emergency Preparedness for a Program Congregation"		
p.19 "Leadership and Governance: Administration and Technology Management for a Program Congregation"		
p.21 " Nurture Hopes and Serve Needs: Social Justice for a Program Congregation"		
p.22 "Nurture the hopes and serve the needs of our community and world Membership and Fellowship Teams for a Program Congregation"		

Means have met or is progressing and is still relevant

Means not met or unknown progress, yet relevant

Means not met, not relevant, several comments to remove

Have met or is progressing and is relevant

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Have not met or unknown progress, still relevant

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Have not met, was not deemed relevant in 2022 or 2023, recommend removing

p.14 "Leadership and Governance: Expand the Portfolio of the Committee on Ministry"		
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Vision

We aspire to be a generous, loving, and diverse intergenerational community that fosters and celebrates free religious exploration and expression, inspires spiritual growth, appreciates the gifts people share, and encourages lives of integrity, joy, and service to our congregation, our community, and our world.

Mission

We are a free and diverse, multi-generational spiritual community promoting liberal religious exploration in a congregation governed by democratic principles, and committed to stewardship, friendship, and shared ministry, as we live out our Unitarian Universalist values.