

UNITARIAN CHURCH OF BATON ROUGE STRATEGIC PLANNING PROCESS 2009-2010

Introduction

In the summer of 2009, UCBR entered into an eighteen-month planning process, which has culminated in a strategic plan for the church covering the years 2011-2015. The planning process actually began when Susan Smith, District Executive for the Southwestern UU Conference, met with church staff in February 2009 and provided an overview of a planning process that the church might elect to follow in developing a long-range plan for addressing the mission and vision of the church. In May 2009, Susan met with the members of the Board and Planning Committee, and the decision was made to move forward with the planning process.

Four Aspects of Growth

The planning process adopted by the Board and Planning Committee is based on four aspects of congregational growth. The most familiar aspects are **Numerical Growth** (increasing membership and finances) and **Organic Growth** (infrastructure, i.e., staff, facilities, governance structures, and policies and procedures). Neither of these two aspects of growth are likely to occur unless the remaining two aspects of growth are addressed: **Maturational Growth** (members growing in the maturity of their faith, deepening their spiritual roots and broadening their religious imagination) and **Incarnational Growth** (how well our congregation and our members live out our shared core values and make a difference for the better in the larger community).

Shared Core Values

Our shared core values are addressed in the church's Purpose and Mission Statement from our Bylaws, in our Mission Statement, in our Vision Statement ("Many Beliefs, One Community, A Better World"), and in the Principles that our church covenanted to affirm when it joined the Unitarian Universalist Association.

Cottage Meetings

In July 2009 facilitators were trained, and in August 2009 ten cottage meetings were held, in which participants were asked to respond to two questions, one addressing Maturational Growth (*If you were a better UU a year from now, how would you know it?*) and one addressing Incarnational Growth (*What difference do you think our congregation could be making in the larger community?*). Approximately 100 members attended and participated actively in these meetings.

End Statements or Goals

All of the responses submitted by cottage meeting participants were compiled by Dottie Kelly, and then a team of three (Diana Dorroh, Janina Fuller, and Scott Ross) grouped the responses into several themes. The Planning Committee's 13 members reflected on the themes and found that they could be combined into six end statements, or goals that we strive to meet, which grouped well under the three parts of our vision statement:

Many Beliefs

We deepen and expand our understanding of, and ability to articulate, Unitarian Universalism. We commit to grow spiritually and to live our Unitarian Universalist values in our daily lives.

One Community

We commit to shared ministry and leadership. We are a welcoming community that embraces and promotes the worth and dignity of all.

A Better World

We make our presence known because our religious tradition has much to offer. We embody our Unitarian Universalist values by advancing social justice through education and advocacy and by responding to those in need in our community through organized service projects.

Cottage Meeting Feedback Sessions

These end statements were publicized in the church newsletter, and three feedback sessions were held at the church in November 2009 to share the input received in the cottage meetings and to outline the process being used to move forward to develop strategies for achieving the goals articulated.

Council Strategies and Means Sessions

In February and March 2010, each of our six Program Councils (Adult, Connections, Outreach, Religious Education, Religious Services, and Social Justice) met and responded to two questions related to the six goal statements: *What things can be done in your area to take our achievement of these goals to the next level? What infrastructure (staff, facilities, equipment, policies, etc.) are needed to increase our capacity to achieve these goals?* Participants began by responding to the first question, brainstorming strategies for addressing each of the six goals from the perspective of their particular council's mission. Next participants determined the five strategies that they believed were most important to pursue over the next five years and addressed the second question for each of those strategies. These Council meetings were opened to anyone interested in attending, and attendance totaled over 80.

Consolidation of Strategies

The Cottage Meetings and Council Sessions produced a wealth of thoughtful and creative responses to how our church can enhance its ability to fulfill its mission. Even though all goals and strategies suggested could not make it into this five-year plan, creative ideas for the future emerged, and the Council sessions offered ministry teams a chance to explore in-depth their Council's mission. Penny Ramsdell compiled and organized the complete lists of strategies suggested by all six Councils, as well as the top 30 strategies (and the recommended means for achieving them) that emerged when each council prioritized five strategies. The Planning Committee then reviewed these top strategies from the perspectives of duplication and feasibility, leading to the combination of a couple of strategies, the dropping of a couple, and the addition of a couple, as a result of input from staff. This process resulted in the following Maturational and Incarnational Growth Strategies:

Maturational Growth Goals and Strategies

“Many Beliefs”

- A1. Deeper understanding of UUism and better ability to articulate UUism to others
 - A 1a. Church programming (worship, workshops, Branches sessions) to help members develop skills in communicating UUism
 - A1b. UU Education course beyond Introductory Roots
 - A1c. Worship service series with more extended theme/greater depth
 - A1d. UU camps during summer/school breaks for children and youth
 - A1e. Boston heritage trip for middle and senior youth
 - A1f. More worship services at other times and of other types
 - A1g. Ministerial coverage for all worship services

- A2. Spiritual growth; UU principles would be manifest in our daily lives
 - A2a. Things you can take away from services to think about at home
 - A2b. Ongoing commitment to Branches small group ministry
 - A2c. Enhanced pastoral care ministry

“One Community”

- B1. Commitment to shared ministry and leadership
 - B1a. Training people for shared ministry
 - B1b. Internal workshops for leadership training
 - B1c. Send members to external trainings, such as DBLE [also addresses A1]
 - B1d. Ongoing communications effort about social justice
 - B1e. Provide ministerial internship for seminary student

Incarnational Growth Goals and Strategies

“One Community” (continued)

- B2. Welcoming community embracing the worth and dignity of all
 - B2a. More intentional in approaching people
 - B2b. Make more visible our inclusiveness
 - B2c. Focus on youth
 - B2d. Enhanced ministry to parents of children in Religious Education
 - B2e. Providing regular potlucks and catered meals at church
 - B2f. More jointly-sponsored community programs, partnering with external groups [also addresses C2]
 - B2g. Offer more age levels of OWL (Our Whole Lives)

Incarnational Growth Goals and Strategies (continued)

“A Better World”

- C1. Making our presence known because our religious tradition has much to offer
 - C1a. Develop a marketing plan
 - C1b. Expanded on-line presence, utilizing social media (facebook, website, blog)
 - C1c. Visibility through television and radio
 - C1d. Worship services in other locations

- C2. Embodying our values through social justice and community service projects
 - C2a. Internal programming focused on identified social justice issues
 - C2b. Publicize and attend public forums in groups,
 - C2c. Work on policy issues—advocacy at the legislature
 - C2d. Involve members in one large service project, such as volunteering in, and advocacy for, public schools
 - C2e. Service projects in community for 60th anniversary year
 - C2f. More involvement in interfaith projects
 - C2g. Mission trip for youth and adults

Means of Accomplishing Chosen Strategies

The Planning Committee reviewed the means recommended by the Councils for accomplishing the chosen strategies, a process that resulted in the following organic growth goals [bracketed numbers indicate the maturational and incarnational growth goals addressed by each organic growth goal]:

Organic Growth Goals

A second minister so that the church has sufficient professional ministry to:

Provide a UU ministerial presence in the pulpit each Sunday, covering the one Sunday a month, the two months of summer, and the periodic sabbatical leaves of our senior minister [A1c, A1g];
 Expand worship service offerings to other times and types, and possibly other locations [A1f, C1d];
 Share in the ever-increasing needs for pastoral care to the ill and dying, the homebound and the bereaved [A2c];
 Share in the ever-increasing requests for weddings, services of union, child dedication ceremonies, and memorial services [A2c];
 Help train members for shared ministry and support Branches leaders [A2b; B1a];
 Increase our educational offerings to include a UU Education Beyond Roots course [A1b];
 Increase social justice and community service programming [C2a];
 Enable a greater presence in the community and on television/radio [B2f, C1c, C2f];
 Expand ministry to parents with children in Religious Education [B2d]; and
 Possibly share the supervision of an intern minister [B1e].

Additional staff time, paid or volunteer, to:

Organize and facilitate classes and workshops, including leadership training, training for shared ministry, training and administrative support for Branches leaders, OWL courses, welcoming workshops, and UU Education Beyond Roots [A1a, A1b, A2b, B1a, B1b, B2a, B2g];

Coordinate independent and interfaith community service and social justice projects and attendance at community forums [C2b, C2d, C2e, C2f];

Expand Religious Education staff/administrative hours [B2c, B2d];

Coordinate and possibly staff UU camps, periodic Boston heritage trips, and mission trips for youth and adults [A1d, A1e, C2g];

Provide tech support for the website and other communication vehicles and for the audio/visual needs of the church [A2a, B1d, B2b, B2c, C1b];

Provide music for additional worship services (paid pianist, children's choir director, possible band) [A1f, C1d];

Prepare handouts to accompany worship services (prayers, meditations, readings, etc.) [A2a]; and

Organize, and possibly cater, regularly scheduled potluck meals at the church [B2e].

[Note: A second minister position could address a limited number of these needed staff hours.]

Improved/added facilities and equipment:

Improved sanctuary with raised chancel, stage lighting, painting, carpet, acoustical treatment, and audio/visual system [A1a, A1c, A1f, B2f];

Audio/visual system for use in the fellowship hall and other parts of the building [A1a, B1b, C1d, C2a];

Improved/expanded parking and separate driveway for garbage trucks [A1a, A1d, A1f, B2f];

Multipurpose **space**/building with kitchen for congregational meals, adult activities, workshops, and wedding receptions (remodeling of current kitchen to accommodate a freezer if new kitchen is not added) [A1a, A1d, B1a, B1b, B2e, C2a];

Large classroom dedicated to adult religious education/forums on Sunday morning [A1a, A1b];

Room to house the church library and accommodate board and committee meetings [A1a, B1b];

Permanent location in an accessible place for the bookstore [A1a];

Private room dedicated for use as a Listening Room [A2c];

Expanded nursery space and a minimum of one additional RE classroom [B2d];

Equipping of the choir room to serve as space for quiet worship and possibly small weddings [A1f];

Van [B1c, B2c, C1d, C2e];

Offices for second minister and additional staff; and

Half lavatory for senior minister's office.

Additional programmatic operating expenses for:

Conferences, workshops, facilitators for leadership training, ministry trainings [B1b, B1c];

Week-long UU camps, Boston heritage trips, and mission trips [A1d, A1e, C2g];

Periodic radio spots [C1c]; and

Ministerial intern stipend and housing [B1e].

Paid consultants to:

Advise on marketing plan [C1a];

Design social media (facebook, website, blog) [C1b];

Provide architectural designs for new/expanded/remodeled space; and

Advise on capital fund drive.

Expanded Member Information via:

New picture directory [A2c, B2b];

More comprehensive information in membership directory [A2c, B2b]; and

Possible members-only website.

Legal advice re:

Putting readings, etc., on website [A2a];

Streaming and pod-casting services/sermons [C1b, C1d]; and

Limits of political advocacy as a non-profit religious organization [C2c].

Additional policies for:

Use of communication vehicles (website, email, newsletter, public relations, blogs) [B1d, C1b];

Political advocacy [C2c]; and

Service projects [C2d, C2e].

Time Line and Numeric Goals

Next the Planning Committee worked with the leadership of the church, lay and professional, to convert the goals, strategies, and concrete means developed in the planning process into a five-year time line with financial estimates and a plan for funding the steps included.

Communication with Board of Trustees and Congregation

Throughout the planning process, the Planning Committee submitted updates to the Board of Trustees of the progress made and secured their affirmation of the goals, strategies, and means being identified.

Periodic reports were made to the congregation at membership meetings and in the church newsletter.

UCBR Planning Committee

Scott Ross, Committee Chair (2009-2010); Bob Dorroh, Church President (2009-2010) and Committee Chair (2010-2011); John Barr, Church President (2010-2011); Steve Crump, Senior Minister; Ila Stoltzfus, Music Director; Jessica Gray, Religious Education Director (2009-2010); Becky Cureau, Volunteer Outreach Director; Diana Dorroh, Volunteer Adult Program Director; Earle Ramsdell, Volunteer Pastoral Care Director; Warren Fraser; Janina Fuller; Dottie Kelly; Wayne Miles; Penny Ramsdell.