



# Long Range Planning Committee 2019 Report: Long-Range Action Plan

## **Long Range Planning Committee**

Name	Role	Appointed
Marie Laberge	Chair	2015
Theda Ellis	Member	2015
Rachael Coffey	Member	2018
Beth Rausch	Member	2018

# UUFN Long-Range Action Plan

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## Current Vision & Mission Statements

Being present... Nurturing community...Taking action... We create change and are thereby changed.

-UUFN Vision Statement, 2006

The Unitarian Universalist Fellowship of Newark is a community of spiritual seekers inspired to promote a just and compassionate world.

- UUFN Mission Statement, adopted 2014

# UUFN Long-Range Action Plan

## Long Range Planning Committee: Charge by the Board

**Unitarian Universalist Fellowship of Newark  
Long Range Planning Committee**

**3/23/2015**

The Long-Range Planning Committee develops and facilitates a process to determine a congregation's future. The result of this process, which will include contributions from the congregation's membership and special focus groups such as congregational committees, as well as the minister, is a long-range planning report. This report may take the form of a Five-Year Plan. In this report, the committee makes recommendations to the Board, the minister, and the entire congregation, based on the results of the long-range planning process.

The Long-Range Planning Committee is a Committee of Continuity as described in the UUFN Bylaws. The committee will consist of six or seven members who will serve for staggered terms of no more than three years. Long Range Committee members will initially be appointed by the Board of Directors (Board), with the President appointing the Chair of the Committee upon recommendation of that person by the Committee. Subsequently, new members will be recruited by the Committee.

The Long-Range Planning Committee is in charge of developing a vision, gathering information, formulating crucial questions, determining critical facts to be considered, posing possible solutions, considering the congregation's reactions, shaping final recommendations, and taking those recommendations to the Board. The implementation of ideas presented in the long-range plan would then require Board action and ultimately be brought before the congregation for a vote.

The Long-Range Planning Committee has to determine how to engage itself and the congregation in a long-range planning process to do the following:

- Obtain the information it needs.
- Solicit ideas from the congregation.
- Involve the congregation in exploring new possibilities.
- Help build support for new possibilities and recommendations that come from the long-range planning process.

The long-range plan that results from the process shall be subject to annual review, revision, and extension by the Long-Range Planning Committee. The Long-Range Planning Committee raises questions to the Board, Minister, congregational leadership, and the congregation such as, "Are we meeting our goals and fulfilling our mission? If not, why not?" and "Are our vision and strategies for the future still sound? If not, what changes are needed?"

# UUFN Long-Range Action Plan

## Introduction

A long-range plan is a statement of, and a commitment to, several broad goals that the congregation decides are the most important to address over the next few years in order to live out its values and fulfill its purpose for being.

The last few years at UUFN have been a period of significant transition. We have undergone a negotiated ministerial departure, seen significant reduction in our membership and have had many conversations about who we are as a congregation. This report was constructed by the Long-Range Planning Committee (LRPC) based on input from the congregation, committees, and affiliated groups. The report makes recommendations to the Board, the Minister and the entire congregation, based on the results of the long-range planning process. It addresses areas of concern that have become more visible as a result of the events of last few years and responds to concerns raised by the Board, committees and members.

We see this report as a part of a collective process in which we are all working to shape the actions of this congregation in the next few years. It presents a long-range action plan that will engage us all in working together to move this forward. We propose that the LRPC annually review, revise and extend the long-range plan. The LRPC will work with committees and report to the Board on the plan's implementation. The LRPC recommends that committees report progress on goals, issues encountered, and recommendations for changes in their monthly report to the Board.

## Previous Plan

In Sept 2016 the Long-Range Planning Committee developed and released to the Board and the Congregation a report, which included five recommendations for the first year. They were

- to carry out a Visioning process, which would help us discern where we wanted to be in five or ten years,
- to provide the congregation with significant financial education so that congregational members would understand our true financial status so that informed decisions could be made,
- to conduct a Congregational Composition Analysis to help inform our future planning,
- to enhance our Culture of Service to strengthen the abilities of members and friends to volunteer and serve at UUFN, and
- to perform an assessment of the 2016-2017 Plan and make recommendations for the next year.

## Assessment

We completed a Visioning process, which provided important data about where we want to be as a Congregation, especially regarding Social Justice issues.

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The Board did an amazing and commendable job of providing members with financial information, which led to making some difficult decisions about our staffing and other expenses.

The Congregational Composition Analysis was delayed until early in this fiscal year because of our changing population. We now have that data and will share it with the Board and the Congregation.

The one area where we did not make any headway was with the Culture of Service, because there was so much change happening in the Congregation that it was hard to mobilize the energy.

### Procedure for the creation of this Action Plan

Over the summer of 2018 the LRPC met and began working on a Long-Range Plan for the next few years. This involved meeting with all significant committees and discussing what their plans are for the next few years, as well as working with the Board and leadership to ensure we have transparency and conversations about what they are doing. In our conversations with committees we asked five questions:

1. What is your committee's focus for the next three years?
2. What key issues do you have?
3. Is there overlap with other groups? If so, are you working together? How?
4. Do you have annual and/or longer-term goals?
5. Anything else your committee thinks is important?

We want to thank all the Committees that have provided us with details about their plans for the coming years. We have used the material from these committee reports as well as financial and strategic information from the Board to help develop this plan for the next few years.

As we discussed the data we were processing, we saw seven areas in which we felt there is important work to do and these are addressed in this action plan.

### Areas to be addressed within the action plan:

- ***Spirituality***
- ***Growth/Outreach***
- ***Community***
- ***Culture of service***
- ***Communication***
- ***Finances and Sustainability***
- ***Governance and Structure***

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## Spirituality

**Statement of need:** Congregants are seeking multiple and diverse opportunities for spiritual experiences. They are looking for personal growth and expression within worship services, religious education, social justice action, small group experiences and compassionate outreach and care for one another.

**Goal 1:** Provide a variety of worship services derived from multiple traditions that celebrate our pluralism and led by the minister, visiting speakers, and lay leaders (individuals or groups in the UUFN congregation).

### Strategies:

1. Hire a half-time contract minister to succeed Rev. Paula Maiorano upon her retirement on June 30, 2019.
2. Continue to provide an annual Worship Committee Workshop for those interested in participating in delivery of worship services.

**Goal 2:** Cultivate a robust and growing Religious Education (RE) program for children and adults.

### Strategies:

1. Grow the RE program for children
2. Support a monthly parenting support group. Provide childcare, as needed
3. Include focus on our principles and sources in worship and adult RE classes.
4. Invite congregants to submit proposals and requests to the RE Committee for adult programs and offer at least four annually.

**Goal 3:** Learn and model communication in ways that align with UU principles and encourage exploration and expression of our multiple sources.

### Strategies:

1. Develop opportunities for service as spiritual expression within UUFN and the greater community.
2. Express our UU principles by providing or collaborating on social justice events to include the larger community.
3. Express our UU principles by providing support for groups and services that are aligned with our values through our Share the Plate giving.

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4. Conduct training in compassionate communication as a way of honoring the spiritual nature of each individual.
5. Maintain and publicize the variety of spiritual practices that we engage in, such as worship services, women's spirituality, Zen meditation, earth-based services, the labyrinth program, the Bible for UUs and others.
6. Create awareness in the public about the spiritual opportunities UUFN has to offer.
7. Expand our pastoral care ministry and Helping Hands Committee to care for each other.

**Goal 4:** Support an enhanced musical experience in services.

### Strategy:

1. Explore and utilize available resources within the community and the congregation for expanded music in our services.

Collaborating Parties in Spirituality Goals: Minister, Worship, RE, Board, Communication, Social Justice, LRPC, Choir, Helping Hands

## Growth

**Statement of need:** Congregations that “do church well” grow. Spiritual vitality, organizational maturity and mission in our community are necessary for a healthy and numerically growing community. Our actions in this area are also embedded in the other action areas we have covered, influenced by our perceptions of growth and how we respond to growth. Because the congregational demographics are skewed to older members, growth will be needed to sustain the UUFN over time. The congregation has historically had concerns about growth so it will be important to question what we really want and how to address this area in a way that supports the continuing concept of “Fellowship” as the congregation grows. The strategies in this area include discussion about who we want to be as a congregation.

The Outreach Task Force, which combined representatives from Worship, Membership, Religious Education, Communication and the Minister, is an effective model of combined action that helps to address all these areas.

**Goal 1:** Create a standing Outreach and Growth committee. We propose the Outreach and Growth Committee consider many of the following questions.

- How do our governance and organizational structure fit or not fit our size and purpose? What changes do we need to address if any?
- How does our building serve our mission?

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- How do we understand ourselves as a religious community? Is this reflected in all aspects of congregational life? Our hospitality? Our budget? Our Care for each other? Our roles in leadership and in service to UUFN?
- How do we help each other grow in our spiritual development and maintain a welcoming path for newcomers?
- How does our UU faith inform how we create justice and community in the world?

**Goal 2:** The congregation will review what growth means and establish standards for growth in sustainable ways that continue to support the foundational principles of “Fellowship” so that lay leadership continues to be an underlying principle in the operations of the UUFN.

### Strategies

1. Hold a Congregational Workshop on Growth at a future date to assess what growth means and how we as a Congregation feel about it. This workshop can help raise the consciousness of the whole congregation and share the significance of it outside the congregation.
2. Develop a policy statement that encompasses what we mean by “growth” and how we want to approach supporting growth that can be used to guide us over time.

**Goal 3:** The congregation should develop an infrastructure to support growth that sustains our current values and key foundational principles as a Fellowship.

### Strategies

1. Revise and update the New UU curricula to incorporate the “community of care” concept and pastoral ministries to enable those who are new to the congregation to see the value of the concept of care in their lives as a member of this community.
2. Educate potential new members through the New UU class in the concept of Fellowship, and the differences between a Fellowship and a more traditional church style.

**Goal 4:** Share our affirming pluralism in both belief and in person with the larger community and celebrate it as a model of hope and service to the larger community. Looking at our recent, as well as longer, history of activism and commitment to social justice provides examples of how we have accomplished this (i.e. Women’s March, Science March, Dialogues across Racial Lines, Share the Plate Collections etc.).

### Strategies:

1. Develop articles about the main thesis of the Workshop on Growth to let our congregation know about what it will entail—share how our faith has positively impacted our lives and articulate our identity—who we are, who we want to be and what we have to offer.



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2. Expand our message about who we are and our history as a pluralist faith and how we understand how to behave and act together in love.

Collaborating Parties: Board, Outreach, Membership, Long Range Planning

### Community

**Statement of need:** A consistent theme that shows up over and over in our discussions and surveys about who we are as a congregation is a focus on our Community. We are a community of people actively in dialogue with each other--spiritually, intellectually and socially--and this is valued and recognized by all who join us. Community crosses with several of the other topics covered in this Action Plan. (Culture of Service, Growth, Spirituality, Communication)

**Goal 1:** Continue to offer and expand opportunities for personal and spiritual growth within the context of the UUFN community.

**Goal 2:** Highlight the connections between the Culture of Service and Community development.

**Goal 3:** Develop mechanisms to get to know each other across ages and interests.

**Goal 4:** Offer training on compassionate communication to improve our skills and ability to support each other, particularly in difficult situations, so that we practice our principles and maintain a safe space for all.

#### Strategies:

1. Reinvent extended families and develop other social activities across interests. Consider options such as Mystery Friends.
2. Investigate and initiate options that utilize small groups for discussion of spiritual topics.
3. Continue to offer fellowship activities and develop social activities such as Circle Suppers, Second Sunday Potlucks, Game Nights, etc.
4. Work to advance the concept of a “community of care” using Helping Hands Committee, in partnership with other committees.
5. Revive the concept of “clusters” or groups that are there to support one another, whether in the form of extended families or by some other configuration, e.g., groupings via zip code.
6. Create fun.

Collaborating Parties: Fellowship, Worship, Communication Committees

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### Culture of Service

**Statement of need:** The Unitarian Universalist Church of Delaware County (UUCDC) developed a **Growth through Service Program** that we believe is an effective tool to address many of our needs and develop specific action items that will help us fulfill this area of our mission. The objective of the program is to cultivate a Culture of Service that expresses our spiritual commitment to service, permeates the workings of the congregation and facilitates community building. Their Statement of Theological Grounding highlights the significance of the Culture of Service:

*“As Unitarian Universalists, we live out our faith through our service to others. True spiritual growth, in ourselves and in our congregation often arises through our connectedness with others and through serving a higher purpose that is greater than our own individual needs. In this context, service to our church community becomes a sacred experience, one in which our relationships are defined by a sense of caring, respect, commitment, and responsibility.”* (UUCDC Statement of Theological Grounding”)

Recognition of the significance of the varied ways we provide service to our community and development of the tools needed to facilitate service with ease and efficiency will open opportunities to members and friends to engage in service, support the Fellowship and connect with others. It allows us to connect our spiritual practice with serving our community and accomplishing important pragmatic work that is needed. It is our spiritual expression in the world.

As the UUFN Leadership Development Committee has described, “‘Culture of Service’ helps members discover and [achieve] their full potential and be transformed through service. The goal is empowered, inspired volunteers who take on all levels of responsibility in order to transform our church, themselves and the community. In addition to helping individuals progress along their spiritual journey, a ‘Culture of Service’ can a) engage and embrace the entire congregation to [take ownership] of the church, and, b) assist in attracting and retaining UUFN members.”

**Goal 1:** Educate the UUFN community on the significance of and possibilities involved in the creation and implementation of a Culture of Service Program.

#### **Strategies:**

- 1 Present a Sunday Service to introduce the concept to the Congregation: Presented Oct 14, 2018
- 2 Educate the congregation about what a Culture of Service entails through newsletter, and conversation.
- 3 Incorporate Culture of Service into the New UU and ask all members and friends what their particular gifts and interests are for service within the UUFN.

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Collaborating Parties: Long Range Planning Committee, Minister, Leadership Development, Membership, Helping Hands

**Goal 2:** Develop the resources and database needed to provide members with the needs of the Congregation and the outside community and concrete ways they can be of service. Provide leaders of the Congregation with information about members talents, experience and interest in serving.

### Strategies:

1. Develop a UUFN Member Talent, Experience and Interests Database.
2. Develop website resources where people can find local information about possible tasks to be accomplished and committee positions that need to be filled.
3. Facilitate Committee utilization of website resources and post needed service opportunities.
4. Conduct an in-person interview with all UUFN members and friends to learn more about their gifts and interests for service within the UUFN.

**Goal 3:** Develop a process for recognizing and expressing appreciation people's contributions and acknowledging their valuable service to UUFN.

Collaborating Parties: LRPC, LDC, Membership, Communications, Office Administrator

## Communication

**Statement of Need:** Clear, respectful, effective communication helps us to deepen our connections to each other and fulfill our mission. Internal and external communication are essential to fulfilling our mission. Congregants place a high value on communication and have expressed a desire to deepen their spirituality through relationships with each other. We believe communication is central to our functioning effectively. We are exploring possibilities of bringing a program on "Compassionate Communication" to UUFN.

**Goal 1:** Enhance and support positive **internal communication** between and within:

1. The Board, committees, and the congregation, and
2. Among congregants.

**Goal 2:** Educate congregation about what it means to be a Fellowship and about who we are and how we do things.

**Goal 3:** Develop an awareness within the congregation of the governance structure and to whom to address questions and concerns by communicating the responsibilities of the Board and the roles of individuals on the Board.

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**Strategies, Internal:** Continue to support ongoing activities of the Fellowship that promote communication, including:

1. Update New UU/ Renew UU Classes to address our focus on respectful communication.
2. Initiate new Chalice Circles and continue the Connecting Around the Chalice and Lay Leaders conversations to facilitate interpersonal connection and spiritual growth.
3. Renew use of pre-service slide show to provide attendees of worship services information about upcoming events as well as opportunities to serve the congregation.
4. Continue successful ongoing activities that facilitate communicating what we do, including: fellowship activities, Update/OOS/newsletter, worship service/coffee hour.
5. Develop non-web-based communication channels, e.g. the telephone tree, home visits, etc.
6. Find ways to inform the congregation when people are in need, while respecting confidentiality and boundaries.

Collaborating Parties: Fellowship, Worship, Chalice Circles, Communication Committees and Minister, Helping Hands.

**Goal 4:** Enhance communication between and among congregants by sponsoring “Compassionate Communication” or other similar skilled training in respectful communication.

**Strategy:**

1. Appoint a Task Force to bring “Compassionate Communication” training to UUFN.

Collaborating Parties: Board, Minister, Long Range Planning Committee, Pastoral Care, RE, Helping Hands

**Goal 5:** Ensure a robust web presence by committing resources to evaluate and update website on a regular basis. This would improve communication internally and externally.

**Goal 6:** Enhance and support positive **external communication** with:

1. Community organizations
2. Prospective members
3. UUA, UUA Central East Region (CER) staff, Delmarva UU Cluster, interfaith community (include Jewish, Islamic and other faiths).

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4. UU Delaware Advocacy Network (UUDAN).

### Strategies:

1. Assess the effectiveness of the Outreach Task Force campaign of the summer of 2018.
2. Use the model of the Outreach Task Force to connect the needs of different constituents in the Congregation with each other and develop a coherent communication program
3. Develop a strategic social media practice that fully utilizes a variety of media options.
4. Continue ongoing successful communication activities such as Webpage, Community Days, Education/Social Justice events.

Collaborating Parties: Fellowship, RE, Worship, Communication Committees and Minister, Outreach Task Force.

## Finances and sustainability

**Statement of need:** Following a period of expansion beyond our means, we have had to reduce staff and defer property maintenance, leaving us with a variety of financial challenges.

**Goal 1:** Have a strong financial base that supports our staff and property, is transparent to the membership, is sustainable over time, and that allows us to fully meet our mission within the limits of our budget.

### Strategies:

1. Continue working to make financial information transparent and to educate the congregation about our financial status.
2. Articulate a vision of the concept of abundance and financial stability and its connection to the culture of service.
3. Integrate the culture of service into the stewardship campaign.
4. Educate the Board about policies that impact the budget, for example, personnel and benefits.

Collaborating Parties: Board, Finance Committee, Stewardship, Long Range Planning Committee

**Goal 2:** Review property maintenance needs and plan for maintenance of our property.

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### Strategies:

1. Create a Property committee to respond to maintenance issues as well as plan for future maintenance needs.
2. Solicit advise from structural engineer about property concerns and needs.

Collaborating Parties: Board, Property Committee

## Governance and Administration

**Statement of Need:** In our congregation, administrative operations are managed by volunteer lay personnel. As leadership positions turn over, the transfer of information and knowledge to the new parties has varied. Thus, there is a need for the UUFN to strengthen its governance systems and infrastructure so that systems will be in place across administrations and personnel that support the sustainability of the Fellowship.

**Goal 1:** Educate the Board on best practices regarding its roles and responsibilities and continue that education across Boards over time.

### Strategy

1. Provide the Board annual governance training regarding best practices, what it means to be a Board member, including fiscal oversight and relationship of Board members with the staff. Following the initial training, provide incoming Board members this training.

Following the initial training, provide more advanced Board level training on key subjects as determined by the Board. This might include development, relationships with staff, audit, and other key areas of oversight.

### Activities:

1. Budget for UUA Webinars and/or an outside trainer during the annual budgeting cycle.
2. Hire and schedule a trainer or use UUA staff.
3. Develop a training module using those materials for use by a UUFN member to continue the training in the future.

Collaborating Parties: Board members, Leadership Development

**Goal 2:** Familiarize Board members and committee chairs with current job and committee descriptions, and review and update all descriptions on a regular basis.

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### Strategies

1. Update Board orientation binders to include lists of all key documents related to UUA agreements, committee descriptions, position descriptions, by-laws and other documents yet to be determined.
2. Hold discussions between old and new Board members related to positions and activities of the positions.

Collaborating Parties: Leadership Development, Committee Chairs, Personnel, Others as determined appropriate

**Goal 3:** Enhance the role of the Office Administrator to accomplish key administrative functions in order to promote consistency in operations.

### Strategy:

Continue to transfer administrative functions and the maintenance of key documents to the Office Administrator. Include all formal agreements signed by the UUFN, such as benefit agreements written with the UUA, all contracts for any goods or services, position descriptions and personnel files, forms (such as Endowment applications, formal policies and procedures, inspection reports and maintenance records). This will provide a central operations hub for the UUFN and eliminate the issues of transfer and maintenance of files by volunteer committee chairs.

### Activities:

1. Review and revise the Office Administrator's job description to include all relevant functions.
2. Review the UUA Benefits Workbook on an annual basis to keep UUFN in compliance with its agreements with UUA related to benefits.
3. The SRS Team will review the growth of responsibilities as part of their ongoing role and will make timely (during budget development) recommendations to Finance and Personnel Committees and the Board concerning the need for addition hours or pay.
4. Develop an annual calendar for all administrative functions, including review of UUA documents, benefits review, needs for annual meetings, and others as determined.
5. Survey committee chairs regarding key legal and administrative documents that support the Fellowship and need to be maintained in the office.

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Collaborating parties: Board, Office Administrator, SRS Team, Personnel Committee, Leadership Development

**Goal 3:** Develop and implement brief training and/or mentoring for committee chairs on leadership.

### **Strategies:**

1. Survey committee chairs about what they want/need to function well as a committee chair.
2. Use UUA Leadership online training.
3. Develop mentoring system for experienced chairs to support incoming committee chairs using previous experience.
4. Educate committees on their “rights and responsibilities” related to empowering them to exercise their authority, understand its limits and recognizing their responsibility to the Board.
5. Office Administrator maintain key legal and administrative documents necessary and relevant to the Fellowship and committees.

Collaborating Committees: Leadership Development

**Goal 4:** Develop a succession plan for volunteer leadership.

### **Strategies:**

1. Identify current leaders by area and skill, as well as their specific contributions. These may be recognized leaders (i.e. president) or individuals who just “step in” and do the job.
2. Develop a mentor system for key positions (i.e. treasurer/membership).
3. Identify potential new leaders who can be groomed for future leadership and set up a mentoring process.
4. Encourage a culture of retaining leaders after service on the Board with knowledge about the functioning and structure of the Congregation to serve in other capacities.

Collaborating Parties: Board, Leadership Development