

# **The Unitarian Church in Summit Strategic Plan (2013-2018)**



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There were many, many people who gave graciously of their time and talents to develop the Strategic Planning process and the final report. We specifically would like to recognize the tireless efforts of Paul Belliveau, our own resident strategic planning expert, Margaret Benefiel and Debora Jackson of Executive Soul, our guides and facilitators, and Jean Crichton, who edited the final document. We thank Karen Damato and Marty Rothfelder who greatly contributed as members of the Planning team during its first year. In addition, we appreciate the courage, support and optimism of our Board of Trustees over the past two years.

Thank you for offering us this opportunity to serve.

## **Executive Summary**

We are entering an extraordinary time — in the world around us and here at The Unitarian Church in Summit. And with it comes an opportunity unlike any other in the history of our 100-year-old-plus institution, the opportunity to welcome more members and friends and to create an enduring impact on our surrounding community.

Like any transformative experience, the next five years will ask much of us — spiritual growth, generosity and commitment. It will ask us to change from the inside out. It will demand that we change not only what we are doing, but who we are being, alter not only the actions we take in community but the lens through which we see ourselves and the wider world.

Over the past year and a half, the overriding goal of the Strategic Planning team has been to facilitate an inclusive process aimed at opening up to a purpose-driven way forward based on creativity and authenticity. The following Plan is built upon our new Mission and Vision, along with desired Strategic Outcomes and recommendations for Specific Actions. Before delving into the details, however, we introduce the strategic drivers that have shaped this Plan, and, we believe, will continue to influence our evolving strategies.

**Live an Embodied Mission:** Our congregation has a clear and powerful Mission. It possesses a compelling narrative that connects past, present and future. The Unitarian Church in Summit's story must be constantly

reflected in our words and actions, rehearsed, and told. We have a meaningful message articulated in our Seven Principles. Revealing and extending that message in everything we do will be our spiritual opportunity over the next five years and beyond; maintaining our strong community will depend on it.

**Attract Growing Share of the “Unaffiliated” Population:** Followers of the American religious landscape understand that the traditional model of “doing church” has been on the decline for decades. Americans are looking for a more engaged spiritual awakening, fresh forms of association and shared spiritual practice. The Unitarian Church in Summit is well-positioned for this changing paradigm.

According to the Pew Forum on Religious and Public Life, one-third of adults under 30 report no religious affiliation, the highest percentage ever seen in polling. Observers say that the people in this growing category of people want a spiritual life unconstrained by dogma and doctrine. As Unitarian Universalists, our revelation is continuous. Ours is a living tradition without creed. Our congregation has the potential to be a spiritual home for this significant segment of the population. We are obliged to reach out to them, as others so fortunately did for us.

**Be Culturally Relevant:** This time of social transformation demands that we reorient our mission to engage new cultural realities. The growth in those reporting no religious affiliation is largely driven by generational replacement; older generations (fewer than 10% of whom report no religious affiliation) are being gradually supplanted by newer unaffiliated

ones. Young adults today are much more likely to be unaffiliated than previous generations were at a similar stage in their lives.

This segment is less likely to attend religious services. They live in a culture that is comparatively more transient and diverse, and they often participate in electronic communities in place of traditional place-based ones. They may not be ready to join a congregation in the traditional sense, but may be open to experiencing our congregation through flexible and networked technology. Our future hinges not only on how we current members connect and engage with one another, but how we minister to this growing and significant segment of the population.

**Open our Doors:** Overwhelmingly through this process, we heard participants ask that we find ways to communicate our mission to the broader community with the clear conviction that if more people knew about us, more people would partner with us. To support our desired growth, we must expand the congregation's outward reach with new expressions, strategies and partnerships. Experience tells us that quality worship and programming are vital to a healthy congregation but are not sufficient over the long-term. We must extend our resources outside the four walls of UCS and deepen and widen our efforts to establish relationships with local and regional partners through a simple and portable message of who Unitarian Universalists are and what we are about.

**Prioritize Sustainability:** The Planning team recognizes that meeting members' needs without compromising those of future generations requires the best efforts of every member and friend of UCS. Sustainability is *the*

issue of our time. Thus, we recommend that resource-conserving strategies be placed at the forefront, and that we include sustainability learning in spiritual education. We must find ways to encourage members and staff to carry daily sustainability practices beyond our facility.

## **Background**

In 2011, the Board of Trustees at UCS resolved to engage the congregation in a visioning process designed to create a five-year Strategic Plan. As the basis of the process, the board chose Appreciative Inquiry (AI), a communal planning methodology that focuses organizations on what is working and how to build on those assets.

The decision to use AI was grounded in a belief in the power of the many over the few. Our best ideas come when we conceive and act on them together. Our Strategic Plan used members' collective input to report on the state of the congregation, our dreams and our vision of how we will live out those dreams in the wider world. The Board developed four driving questions to focus the work:

1. How do we wish to affect the lives of our members and to what end?
2. What is our mission in our community and the world?
3. How do we share the joys we receive as members of this congregation with others seeking such a religion?
4. What changes, including physical, leadership and governance structure, are we willing to undertake to fulfill our larger mission?

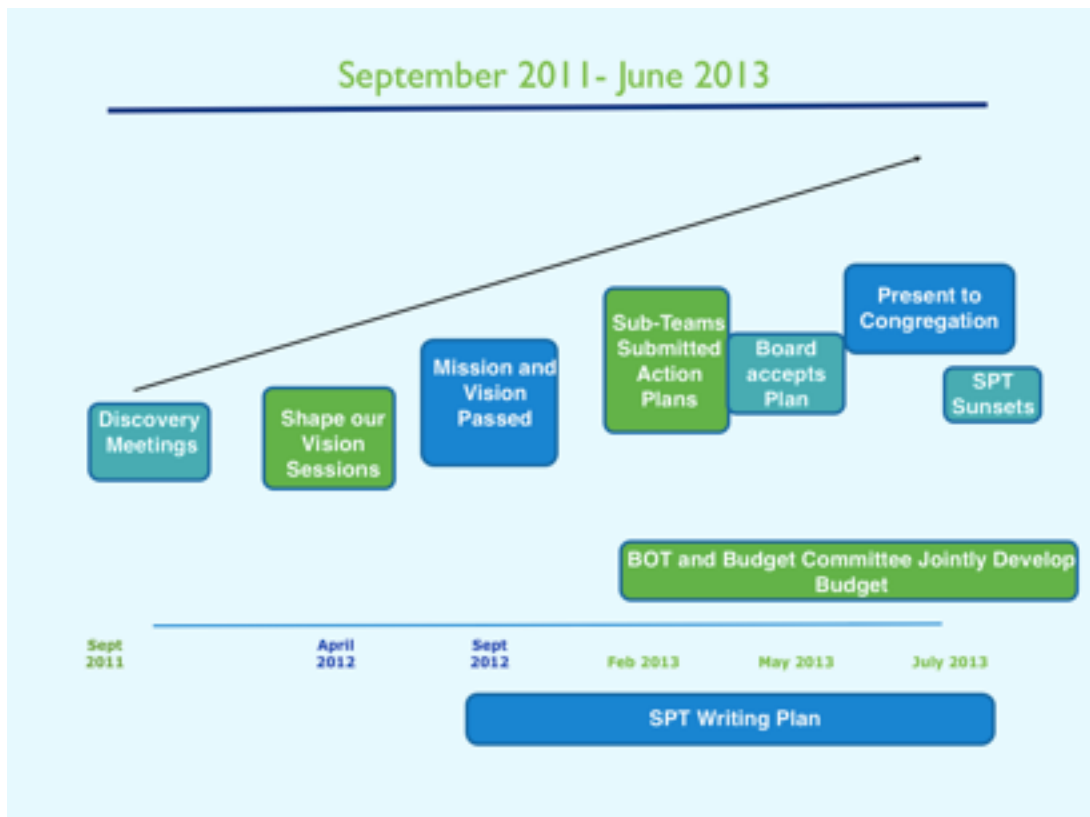
Not long into the planning process, the opportunity arose to purchase the property adjacent to UCS. The congregation voted unanimously to pursue the transaction and, in the fall of 2012, the purchase was completed. The prospects for our congregation to grow in membership and make a greater impact on the community became tangible.

## Process

The Strategic Planning team comprised two Board of Trustees members, our Senior Minister, the Assistant Minister of Congregational Life and four lay leaders.

We began our journey in September 2011. Through small group gatherings called “Discovery Meetings,” we asked the congregation two questions: “What is it that you value most?” and “What are your wishes for our future?” Our goal was to begin a dialogue in building a unified vision for UCS. The response was phenomenal, and members’ creativity invigorated our efforts.

**Figure 1: Strategic Planning Timeline**





In April 2012, we came together again to extend the conversation on the congregation's hopes and dreams into discussions about how we could translate those desires into new modes of being. We prepared six high-level "provocative proposals" and asked the congregation to contemplate and shape them in several "Shape Our Vision" Sessions. Again the reception from the congregation was positive and a joy to behold.

Over the summer of 2012, all members of the congregation were invited to participate in a Mission and Vision retreat to move the congregation from the phase of exploring possibilities to drafting a definitive new direction. The congregation's Mission and Vision were drafted and ultimately accepted by the congregation in September 2012.

After the mission was defined, the Strategic Planning team distilled input gathered through the collaborative Discovery Meetings and Shape Our Vision Sessions into five Strategic Outcomes. These Strategic Outcomes outline the desired effects members of UCS wish to have in our community and in the wider world. The Strategic Planning team then coordinated a comprehensive process to ask existing committees, staff and the Board of Trustees to reflect on the Strategic Outcomes and define what each would be willing to commit in order to help UCS achieve its Mission. These 'sub-teams,' with guidance from the Planning team, drafted action plans, along with the estimated funding and staff time necessary to achieve the highest impact.

This process has been profoundly inclusive. The spirit of collaboration has included more than 175 UCS members and friends, including 18 dedicated

sub-teams, which submitted over 100 action plan items to consider for our future.

The final Strategic Planning recommendations consolidate the outcomes from the various strategic planning sub-teams and add ideas developed by the Planning team members themselves. Planning team recommendations arose from conversations with members and staff, comparative faith institution visits and research, data collection and an environmental scan of American religion today.

We have stressed throughout this journey that the conversation is more important than the final product. On-going dialogue about the strategic direction of our congregation is healthy and often evokes more questions than answers.

This Plan is a living document. It is a framework, a flexible guide, for focusing our energies and resources. The Plan will evolve and grow as we change as an institution and new and unexpected circumstances arise. It is thus a work-in-progress.

## **Mission Statement**

*A mission statement is a statement of identity and purpose. It expresses what we believe at UCS because of who we are and when and where we live.*

**To be a radically inclusive religious community that  
feeds the human spirit and heals the world**

## **Vision Statement**

*A vision statement paints a vivid picture of what our congregation and the world would look like if we were, in fact, able to fulfill our larger mission.*

**The Unitarian Church in Summit values each individual's spiritual journey and offers inspiration toward living with purpose. We are a community that gives voice to a rich religious pluralism and includes a mix of generations, sexual orientations, abilities, cultures, classes, ethnicities and races. Guided by love, we come together to**

- engage deeply with life's challenging questions while acknowledging the mysteries of the universe**
- satisfy our yearning for beauty, connectedness and awe**
- renew and sustain each other, celebrating our unique gifts and shared humanity**
- foster justice, peace and sustainable living as priorities in our lives**
- grow both personally and collectively as we prepare a place for future generations through our generosity, participation and leadership**

**We offer a place at our Welcome Table to all who wish to join us in this feast of the spirit.**

## **Five Strategic Outcomes**

*Strategic Outcomes describe the desired impact our religious community wishes to have, in particular, how we influence the values, knowledge, behavior and skills of our members and the surrounding community.*

*Strategic Outcomes are the ingredients to achieving our long-term mission.*

### **1. Individuals of all ages experience a spiritual awakening that will embolden us to lead lives of purpose.**

- A. People are renewed, challenged and inspired to search for their own spiritual truth and make meaningful choices in their lives.
- B. Individuals of all ages are hopeful and energized after experiencing UCS's multi-generational Worship and Lifespan Religious Education opportunities, focused on common and relevant spiritual topics.
- C. People at UCS possess spiritual maturity. They trust in the multitude of ways each of us experiences and expresses what is sacred.
- D. Individuals across the globe are fed spiritually by connecting to us through flexible and networked modes of broadcast and communication.

**2. In our spiritual community, individuals encounter a more intense and far-reaching experience of life than they can discover on their own.**

- A. People at UCS are a community of care, mutual respect, and radical hospitality.
- B. People at UCS turn the congregation “outward” with new expressions, strategies and partnerships to achieve an expanded and more diverse spiritual community.
- C. Individuals’ religious identification with Unitarian Universalism is more alive and tangible in their lives, due to the connections, curriculums and experiences nurtured in small group ministries and through our Lifespan Religious Education programs.
- D. People at UCS believe that their family and workplace interpersonal skills are enhanced because of their engagement and leadership at UCS.

**3. People at UCS work together and engage others in co-creating a just and sustainable world.**

- A. The community at UCS seeks to deepen its impact and amplify its voice on justice matters of our time.
- B. People at UCS discover a strengthened collective religious identity by being able to articulate their hearts’ and souls’ reasons for pursuing change.
- C. Individuals at UCS prioritize environmental stewardship in all areas of congregational life.

- D. Individuals of all ages find it easy, accessible and rewarding to engage in justice work with UCS.

**4. Individuals practice stewardship to sustain UCS and Unitarian Universalism by providing progressive leadership and generosity.**

- A. People at UCS see the development of young people as our greatest potential. All facets of religious life reflect this belief.
- B. Individuals support UCS out of a moral and spiritual obligation to sustain liberal and inclusive religious choice in America. They make yearly financial pledges to benefit those in our community now and for those who will come after us.
- C. People at UCS make informed decisions based on a free flow of clear, relevant and timely information from various communication channels.
- D. Church governance, staffing, planning and administration support our strategic initiatives.

**5. Our congregation attracts new members to our expanded 'green' facilities that will energize our congregation and community.**

- A. Individuals view UCS as a haven of beauty, peace and sustainability.
- B. Individuals feel that there are many ways to interact with and inform Unitarian Universalism and that our space reflects the many "portals" by which people can get to know each other and the congregation.

- C. Residents in surrounding towns know about The Unitarian Church in Summit and view us as an asset to the larger community.
- D. Participants endorse, with enthusiasm, the Capital Campaign to construct a spiritual home that allows us to live out our larger mission in the world.



## **Overall Strategy for the Next Five Years**

The Unitarian Church in Summit's strategy for the next five years is to grow our capacity to welcome more people to Unitarian Universalism and to our congregation, while strengthening the connections among members and deepening our experience of spiritual growth and service to the world.

### **Specific Actions**

**Experience a spiritual awakening that will embolden us to lead lives of purpose**

1. **Explore new strategies to deepen and integrate Worship, Lifespan Religious Education and Social Action on Sundays**, providing a richer, more comprehensive and convenient experience.
2. **Expand thematic ministries** with more take-home materials, timely podcasts of sermons, lesson plans and on-line materials so participants can continue to explore outside of service times. Expand thematic ministries to Children's and Youth Religious Education and pilot new, on-line content development.
3. **Experiment with different types of music, themes, story telling and ritual** in Worship to complement the relevant theme and to attract younger and/or more diverse members.

4. **Offer more opportunities for youth and children to attend Worship services** and invite participation in services by children, youth and families, when appropriate.
5. **Provide more creative opportunities** for adults and children to examine, debate and enter into dialogue on religious history and ethical concepts (e.g., plays, storytelling, sacred text and poetry readings).
6. **Offer a comprehensive and integrated music program for children** in the classroom and Worship setting. **Experiment with offering choirs for children and youth.**
7. **Move to year-round Worship services, Music and Lifespan Education.**
8. **Provide opportunities--outside of youth group--for youth to participate** in spiritual growth, connection, social action and leadership (e.g., religious education and small groups).
9. **Provide live streaming and archived sermon podcasting and a lively social media presence.**

**Encounter a more intense and  
wide-ranging experience of life in community**

1. **Formulate and centralize a path for all members and friends to connect** and deepen relationships through a small group (8-10 people) ministry that reflects on congregational and life-experience themes.
2. **Establish a Communications and Publications office** that is responsible for the timely and professional publication of events, programs and other relevant information about UCS through publication

of Web, social media, and hard copy content. Develop a Committee Brochure detailing volunteer opportunities and “How do I?” guidelines.

3. **Establish and communicate a graduated and sequential path to membership** that includes introductions to Unitarian Universalism and UCS and provides opportunities both to reflect on previous religious experiences and deepen one’s present spiritual journey.
4. **Expand and maintain a robust membership database, with privacy controls**, that supports pledge and capital campaign tracking and includes photos, career and personal networking, lay leadership talents, and demographic profiles.
5. **Produce expanded annual reporting on the congregation**, tracking key indicators for membership, attendance, participation, larger community involvement, facility use and financial measures.
6. **Staff a team of 10-20 members for Pastoral Care**, with oversight by a Pastoral Care Minister. Teams would provide rides, meals and caregiver respite, as well as visits, card writing and phone calls. Develop programs on end of life preparation and caregiving, as well as forums on peer-to-peer pastoral care ministry.

**Work together and engage partners in  
co-creating a just and sustainable world**

1. **Create** regular, accessible opportunities for members to participate in “**Justice in Practice**” (Learn, Act & Reflect)
2. **Each year, select and promote a signature justice initiative** for UCS, coordinated with the congregation’s spiritual theme.

3. **Offer opportunities for dialogue and action that build bridges across differences** (race, class, sexual orientation and generations), in particular multi-generational and family-oriented service projects.
4. **Develop a communication plan** aimed at explaining our Social Action mission, attracting more members and institutionalizing a practice of shared volunteerism. Prioritize participation as well as dollars raised.
5. **Encourage members and friends to articulate and share how their theology and life experiences inform and motivate their service work.**
6. **Build on our partnerships** with Barót and with the Chancellor Avenue School in Irvington and explore possibilities for other partnerships with UU congregations in Orange, NJ, and Plainfield, NJ.
7. **Strengthen our participation in and appreciation of the larger UU body at all levels, and provide financial help, within our means, so that anyone interested can participate, regardless of financial status:** 1) the Metro New York District; 2) the Unitarian Universalist Association (UUA); and 3) the International Council of Unitarians and Universalists (ICUU).

**Practice stewardship to sustain UCS and Unitarian Universalism by providing progressive leadership and funding**

1. **Hire an Executive Director**, a highly-skilled individual responsible for outreach and communication, development and finance.
2. **Contract with a technology specialist or support team** to augment and maintain our expanding platform of Web and audio-video capabilities.

3. **Transform our giving teams** (Annual Giving, Capital Campaign and Legacy Giving) **into a vital part of our year-round Stewardship Ministry**, increasing member communication and transparency while building our operating budget and realizing our Strategic Plan.
4. **Develop a Leadership Development Program** that will offer lay leaders the opportunity to grow in spirit, skills and confidence in support of UCS's strategic objectives.
5. **Support members in becoming more aware of our current technology offerings** and how to share them with others.
6. **Ensure economic accessibility** to a full range of church activities, e.g., making the scholarship process for fee events known and clear.
7. **Maintain compensation levels for UCS staff at or above UUA standard rates.**
8. As part of the Membership Pathway, **develop a strategy to intentionally keep members active and engaged across all life stages**--from young adult to parent of school age children to long-time members and friends.
9. **Adapt the current governance model of the Board of Trustees** to reflect the goals of the Strategic Plan by formalizing a planning process for setting annual objectives, communicating those objectives to the congregation, instituting reporting systems and developing evaluation protocols.
10. **Formalize the staff structure** by aligning staff job descriptions and annual evaluation objectives to Strategic Plan goals.
11. **Prioritize diversity, both visible and invisible, in future hiring and partnership decisions.**

**Attract new members to our expanded 'green' facilities that will energize our congregation and community**

1. **Expand the current facility, add outdoor space and improve parking options through resource sustainable means** by developing a “Master Facilities Plan” that integrates six elements: Design, Property and Parking Management, Long-Term Staffing, Construction Management, Neighbor and Community Relations and Communication and Coordination.
  - i. Expand the size of our **Sanctuary to flexibly seat at least 400 people**.
  - ii. Consider reconfiguring the **location and design of our Fellowship Hall and kitchen facilities**. The current facility lacks aesthetic appeal and is too small for current congregational activities. The numerous stairs to the lobby and outside can make for a challenging entrance and exit for many. A larger, better functioning space would accommodate concurrent events and offer greater potential for venue rentals.
  - iii. Preserve enough outdoor space to erect a **playground for children** and provide areas for adults and youth to socialize.
  - iv. Be a leader in the Summit area in **marrying historical architecture with environmentally conscious new construction**.
  - v. Provide more **options for parking and transport** to UCS on Sundays.
  - vi. Create **inviting spaces for casual community gatherings**.
  - vii. **Overhaul our current audio-visual** capabilities in the Sanctuary.

viii. Prioritize our goal of increasing diversity in design and décor as a reflection of our desire to be **more appealing to youth and young adults.**

2. **Undertake an ambitious Capital Campaign** in support of the Master Facilities Plan.

3. **Establish a Long-Term Staff Plan** that looks forward 10 years to analyze what size and structure will best support our thriving and vibrant spiritual ministries. Publish and maintain an organizational chart.

4. **Expand our Building and Grounds function** to ensure that we are maintaining our enlarged facility and property and are making timely repairs.

5. **Attract new members** across all demographic groups (age, race, economic status, sexual orientation, etc.) by increasing **awareness of UCS in the Summit area and beyond.** Form an Outreach group to develop simple, portable and graphically pleasing messages via on-line and print materials that promote UCS programs, events and accomplishments to the general public.