

**Unitarian Universalist Congregation of  
the Upper Valley**

**Seven-Year Strategic Plan**



**Prepared by:  
Strategic Planning Committee  
May 2007**

# UNITARIAN UNIVERSALIST CONGREGATION OF THE UPPER VALLEY

## SEVEN-YEAR STRATEGIC PLAN – MAY 2007

### Table of Contents

Introduction	Page 3
Program Areas:	
➤ Worship	Page 5
➤ Religious Education	Page 6
➤ Caring Community	Page 7
➤ Social Action	Page 8
➤ Resources	Page 9
The Numbers: Growth projections	Page 11
Appendix:	
A: UUCUV Mission Statement	Page 13
B: UUCUV Vision Statement	Page 14
C: Strategic Plan Charge	Page 15
D: Suggested Assignments	Page 16

Source Material used for the development of the Strategic Plan will be available in a binder at the Meeting House for review

## **Introduction:**

The UUCUV is growing! We have been adding new members, adding new programs, and growing community and understanding. This is a good thing. But we do need to engage in a planning process to deal with the consequences of growth.

Over the last three years the UUCUV has been engaged in a planning process. We have attempted to answer three questions:

- Who are we?
- Where do we want to go?
- How do we get there?

Who we are and where we want to go were outlined in the updated Mission and Vision statements from November 2005. (see Appendix A & B)

To get us “there”, the UUCUV Board created three Sanctuary Committees: Building, Capital Campaign, and Strategic Planning. The timeline for the work of the Building and Capital Campaign Committees has been extended while the Strategic Planning work was completed.

The Strategic Planning Committee members: Lori Fortini-Chair, Mardy High, Suzanne Simon, Terry Rosenmeier, and Rev. Bruce Johnson ex officio. Stephen Ketcham began the work with the committee before he left the church. (see Appendix C for charge to Strategic Planning Committee)

In 2006 and 2007, the Strategic Planning Committee did research, including conducting a survey and interviews within the congregation and in the wider community, and developed the Strategic Plan document that you now have before you.

## **What is the Strategic Plan?**

The Strategic Plan looks at all aspects of our congregational life and sets out goals and objectives for us to act on during the next seven years in order to achieve our Mission and Vision within the context of our growing congregation.

## **A Living Document**

All plans are constantly changing, whether they be the plans of individuals or of organizations. All plans must adapt to changing circumstances or become irrelevant. So it is with the Strategic Plan.

The implementation of the Strategic Plan will be managed by the Board. Our intention is for the Board to prioritize and assign responsibilities for goals and objectives and that the Strategic Plan be reviewed and updated periodically by the UUCUV Board or its designates. (see Appendix D)

### **What about the Sanctuary?**

You will notice that the Strategic Plan is not a plan for building a Sanctuary, although the Sanctuary does appear in the plan in a few places. This is intentional. Our purpose as a congregation, our activities, and our community life exists with or without a building. Indeed, many of the goals and objectives proposed in the Strategic Plan will be accomplished before the Sanctuary is built, and many of them will continue after the building is completed.

However, we know that form follows function. Our planning process identified our future program needs to provide information about our physical space needs as we look toward building our sanctuary. Our vision for the future allows us to hold all of our activities under one roof and to create a real spiritual home for our growing UUCUV community.

OVER THE NEXT SEVEN YEARS, GUIDED BY OUR MISSION AND VISION, THE  
UUCUV WILL EXPAND AND ENHANCE OUR CORE PROGRAMS  
AS WE BECOME A MID-SIZED CONGREGATION

WORSHIP: Provide high quality and engaging worship services and celebrations

Goal A: Attract & welcome all into our community

1. Hold Sunday services in the same location year-round
2. Explore worship options to accommodate a growing congregation including:
  - a. Option: Expand seating at Marion Cross School
  - b. Option: Explore rental of larger auditorium for Sunday Services
  - c. Option: Hold second service on Sunday with shared coffee hour
3. Explore worship options to accommodate a diverse congregation
  - a. Option: Hold different types of services to draw different crowds
  - b. Option: Hold services on days and places other than Sundays at Marion Cross School
  - c. Option: Celebrate special occasions – e.g. Solstice Celebrations
  - d. Option: Provide services in other locations – e.g. Kendal programs
4. Invite nationally known speakers and musicians several times a Year
5. Improve visibility of our property through signage and on the internet through our web site
6. Build a Welcoming/Green Sanctuary with the capacity to hold all of our community in worship, educational and social events

Goal B: Nurture people's spirits within the community

1. Provide worship experiences drawing on all of our sources of faith within the context of our UU principles, tradition, and history
2. Increase lay-leader participation by developing worship associates program
3. Foster increased youth participation in services
4. Incorporate a strong musical component – e.g. vocal and instrumental, youth participation – into every service
5. Provide feedback avenues and act on comments about our services

**RELIGIOUS EDUCATION: Facilitate spiritual and ethical growth of the whole person through all stages of life**

Goal A: Strengthen and expand well-attended children's Sunday school for all age groups

1. Develop and increase Religious Education staffing as program grows
2. Develop publicity strategy aimed at attracting young families

Goal B: Build vital youth group with connections to VT/NH/Northeast Districts and UUA

1. Host District Youth Conferences regularly
2. Establish youth liaison to Board
3. Provide field trips to UU historical sites
4. Help local youth establish connection with sustainability efforts

Goal C: Strengthen and expand campus ministry and young adult program

1. Continue to provide connections for young adults to our UUCUV community
2. Facilitate student organized young adult groups for UU focused social or service activities on various local campuses

Goal D: Enhance Adult Religious Education Program

1. Provide adult religious education experiences drawing on all of our sources of faith within the context of our UU principles, traditions, and history
2. Expand opportunities to meet peoples' religious education needs including:
  - a. Option: Offer Sunday a.m. adult Religious Education
  - b. Option: Offer lay-led adult Religious Education programs
  - c. Option: Discussion sessions on sermon topic after services
3. Sponsor educational presentations open to Upper Valley community

**CARING COMMUNITY: Nurture a culture of compassionate caring within our congregation  
and extend it outward into the wider community**

Goal A: Establish opportunities for cultivating deep and significant relationships as we grow

1. Provide mentors for new members
2. Nurture and deepen Chalice Circles Program
3. Foster interest groups and neighborhood groups
4. Train facilitators to lead small groups
5. Create regularly updated photo directory

Goal B: Promote greater involvement of members and friends in ministering to each other

1. Create Caring Community Network, with responder groups to meet particular needs e.g. carpooling, meals, grief support
2. Recruit and train responders
3. Develop and keep current a database of responders
4. Include explanation of Caring Community on website

Goal C: Foster open, honest, and respectful relationships within the UUCUV Community

1. Develop a Safety Policy to govern interactions among our children and adults
2. Develop a Beloved Community Covenant
3. Establish procedures for conflict resolution
4. Integrate the principles of our covenant into our activities and teachings as part of our community's cultural fabric

Goal D: Be known as a vibrant community with activities for members, friends, and the greater Upper Valley Community seven days a week

1. Promote quality of services, activities, and programs especially those focused on families
2. Offer many opportunities for socializing and having fun together
3. Emphasize communication to the wider community
  - a. Enhance website and new member information
  - b. Establish "Youth News" to highlight our youth activities
  - c. Improve marketing/publicity campaign

**SOCIAL ACTION:** Pursue social and environmental justice in our local, national, and global communities through actions, financial support, and service as individuals and as a congregation

Goal A: Strengthen our organizational capabilities to support social action

1. Revitalize the Social Responsibility Committee
2. Recruit and train leaders for social action program
3. Create a clearing house of opportunities for social action
4. Improve communication on congregational social action projects and accomplishments

Goal B: Expand our congregation's social action programs

1. Continue expanding and communicating our identity as a Green Sanctuary and Welcoming Congregation
2. Utilize the United Valley Interfaith Project as a source of leadership development
3. Participate in Tucker Foundation social action efforts with Dartmouth students
4. Invite social and environmental speakers and host films for the wider Upper Valley community

Goal C: Continue to grow our Congregation's charitable giving program

1. Strengthen our financial base to increasingly enable our fundraising proceeds to support social actions rather than operating budget
2. Start a Sunday Service plate for Social Action program
3. Explore ways to support social action in the global/international community

Goal D: Foster individual social action from the local to the global:

1. Have regular events for sharing our stories of social action
2. Make a thermometer for individual social actions, measuring our hours
3. Include social action information on congregational database
4. Celebrate and recognize what we do as individuals

**RESOURCES:** Strengthen and maintain our congregation as an organization through the identification, development, and effective use of the full range of resources available to us

Goal A: Exercise wise stewardship of Human Resources

1. Expand leadership development for volunteers
  - a. Broaden the duties of the Nominating Committee to include recruitment, training, and support of Board members, committee chairs, and other volunteers
  - b. Develop a data base as a tool to capture interests/talents of members and friends
  - c. Explore the creation of a position of coordinator of volunteers to match interests/talents with volunteer opportunities
  - d. Commit to making volunteer leadership development training a budget priority
2. Support and expand our paid staff
  - a. Maintain a strong Personnel Committee to assure that benefits/fair wages for staff continue to be in line with UUA guidelines
  - b. Review and increase staffing levels as congregation grows
3. Maintain support of our Minister and congregational ministry
  - a. Strengthen Committee on Ministry to assure that benefits/fair wages are in line with UUA guidelines for the minister
  - b. Provide training to Committee on Ministry to ensure strong conflict resolution as a ministerial function
  - c. Move from evaluation of the Minister toward setting goals and evaluating our larger ministry through which we achieve our mission

Goal B: Exercise wise stewardship of our Financial Resources:

1. Shift to year-round financial stewardship model
2. Build an endowment and planned giving vehicles
3. Align our mission to our stewardship drive to improve annual giving
4. Create balanced budgets each year
5. Move toward using fund-raising proceeds for social action/outreach rather than to balance the operating budget
6. Rebuild reserves for major repairs or other projects
7. Launch a well-planned and well-timed capital campaign to finance a sanctuary

RESOURCES (cont.): Strengthen and maintain our congregation as an organization through the identification, development, and effective use of the full range of resources available to us

Goal C: Maintain our current physical resources while we develop new resources:

1. Optimize use of our current Meeting House and property
  - a. Keep Meeting House sustainable and aesthetically pleasing and welcoming
  - b. Continue to maintain the Spirit in Nature Trail
  - c. Maintain and upgrade office equipment and supplies as we grow
  - d. Improve signage to optimize visibility
  - e. Finalize a Safety Plan and put it into operation
2. Plan for and build our new sanctuary!!

**Summary Results UUCUV Numbers Plan 2005 to 2015 BASE PLAN Summary Results**

**Strategic Plan Year Number**

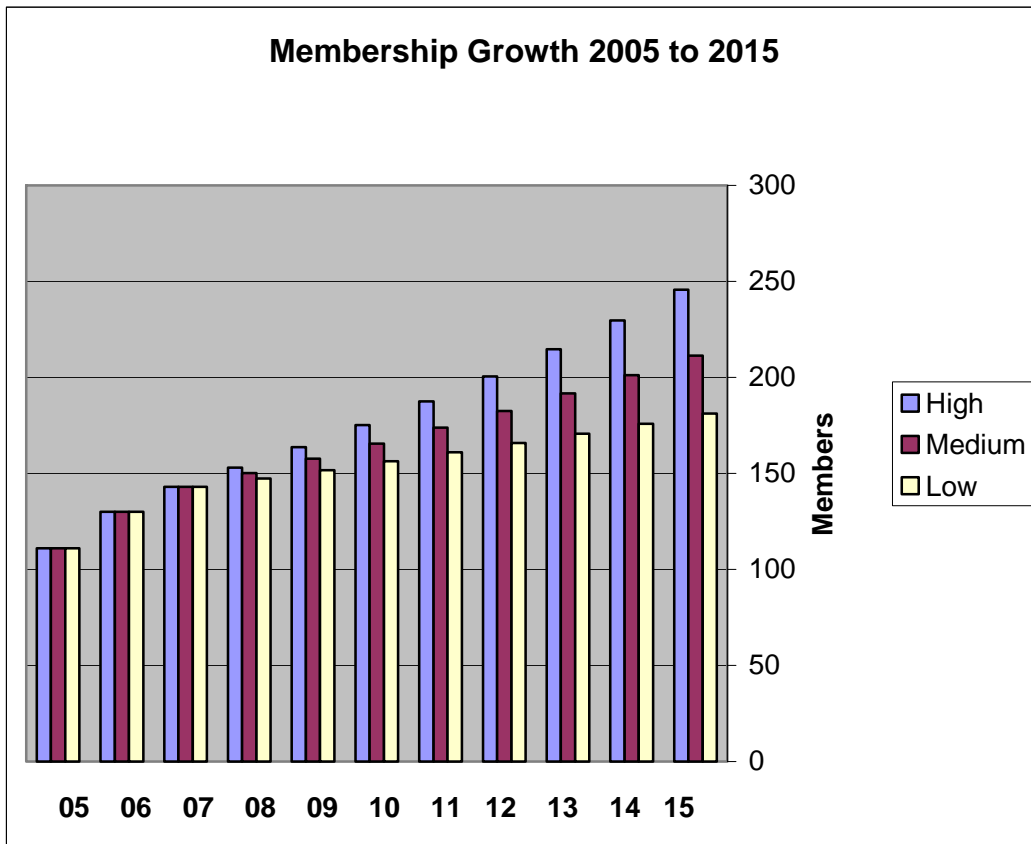
1 2 3 4 5 6 7 8 9

**Years (Fiscal Year)**

2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015

<b>Medium</b>	<b>\$ = Current Dollars</b>			<b>\$ = Constant 2007 Dollars</b>							
Membership at June 30	111	130	143	150	158	166	174	183	192	201	211
Average Attendance	70	74	81	85	88	90	93	96	99	102	105
Peak Attendance	116	108	114	120	123	127	131	135	139	143	147
Children & Youth in RE	44	44	59	62	64	66	68	70	72	74	76
Operating Budget \$	\$131,334	\$143,009	\$169,320	\$174,125	\$182,831	\$191,973	\$201,571	\$211,650	\$222,233	\$233,344	\$245,011
Total Pledge \$	\$99,280	\$109,678	\$123,500	\$144,400	\$151,620	\$159,201	\$167,161	\$175,519	\$184,295	\$193,510	\$203,185
<b>Low</b>											
Membership at June 30	111	130	143	147	152	156	161	166	171	176	181
Average Attendance	70	74	81	83	86	89	91	94	97	100	103
Peak Attendance	116	108	114	117	121	125	128	132	136	140	144
Children & Youth in RE	44	44	59	61	63	64	66	68	70	73	75
Operating Budget \$	\$131,334	\$143,009	\$169,320	\$174,125	\$179,349	\$184,729	\$190,271	\$195,979	\$201,859	\$207,914	\$214,152
Total Pledge \$	\$99,280	\$109,678	\$123,500	\$144,400	\$148,732	\$153,194	\$157,790	\$162,523	\$167,399	\$172,421	\$177,594
<b>High</b>											
Membership at June 30	111	130	143	153	164	175	187	201	215	230	246
Average Attendance	70	74	81	87	93	99	106	114	122	130	139
Peak Attendance	116	108	114	122	131	140	149	160	171	183	196
Children & Youth in RE	44	44	59	63	68	72	77	83	89	95	101
Operating Budget \$	\$131,334	\$143,009	\$169,320	\$174,125	\$186,314	\$199,356	\$213,311	\$228,242	\$244,219	\$261,315	\$279,607
Total Pledge \$	\$ 99,280	\$109,678	\$123,500	\$144,400	\$154,508	\$165,324	\$176,896	\$189,279	\$202,528	\$216,705	\$231,875

**Table 1: UUCUV Numbers Plan Projected Membership Growth**



This charts the actual membership growth from 2005 to 2007 and projects growth from 2008 to 2015

There are three scenarios for projected annual growth rates - high at 7% - medium at 5% - low at 3%

For reference growth in the last three years has averaged 10% after being stagnant or declining in the previous few years.

## Appendix A

### UUCUV Mission Statement

The Unitarian Universalist Congregation of the Upper Valley is a liberal religious community that:

- Welcomes and supports all who search for meaning and truth;
- Celebrates and respects life in all its diversity;
- Nurtures honesty, love, and freedom in people of all ages;
- Fosters spiritual growth and promotes compassionate social action; and
- Expresses Unitarian Universalist ideals, views, and heritage to the community at large.

Approved by congregational vote of the UUCUV on November 12, 2005

## Appendix B

### **UUCUV Vision Statement**

In 2012, we have at least 175 members, with an average attendance of 110 adults and 40 children on Sunday morning.

Our minister, director of religious education, and music director provide leadership and professional support for the congregation and its programs.

We own and enjoy the use of our sanctuary, which is itself a beautiful expression of our shared commitment to values of environmental sustainability, and which provides a home for our many activities. Something is happening seven days a week at UUCUV!

Our worship services are of consistently high quality, address important life issues and speak to both head and heart with spiritual depth and integrity. We have an outstanding music program.

We are a learning community; a lifespan religious education program provides abundant opportunities for people at all stages of life to attain spiritual and ethical maturity.

Small covenant groups are continually formed in which members cultivate deep and significant relationships. People gather regularly to socialize and have fun together!

We face internal differences with openness, honesty, and respect.

Members provide generous financial support, adequate for maintenance and growth of the congregation's programs. The church has an endowment fund and a planned giving program.

There is an abundance of willing volunteers for leadership positions within the congregation. Leaders are thoughtfully recruited, trained, supported, evaluated and appreciated.

A culture of compassionate caring exists within the congregation, so that members freely reach out to one another in times of need, and celebrate together in times of joy.

Individual members are encouraged to express their faith through action in the world, and the congregation as a whole is actively engaged in and financially supports work for social and environmental justice.

We maintain a strong and active ministry to college students in the Upper Valley.

We are known throughout the Upper Valley as a Green Sanctuary and a Welcoming Congregation, and actively participate in denominational and interfaith affairs.

Approved by congregational vote on November 12, 2005

## Appendix C

### Charge from Exploratory Task Force to Strategic Planning Committee October 10, 2005

***To establish a Strategic Planning Committee to plan the growth and development of the congregation of which a sanctuary is an integral part.***

The main tasks of the Strategic Planning Committee shall be to make recommendations to the board and the congregation on the following:

- 1) A plan for the direction and scope of congregational growth and development for the next seven years in the context of the congregation's mission and vision for the future. The plan shall be prepared after consultation with the congregation and its leadership. It will also draw upon existing information and previous consultative processes.
- 2) A seven-year financial plan that will make it possible to implement the growth and development plan and construct a sanctuary. The financial plan will include capital, operating and programmatic cost estimates.
- 3) A comprehensive plan to accomplish these objectives including the role of other committees will be prepared.

## Appendix D

Suggested assignments to implement the goals and objectives of the program plan  
(Actual Priorities and assignments will ultimately be decided by the Board)

<b>Worship:</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal A: Attract &amp; welcome all</i></b>	
1. Hold services in same location all year	Board decision
2. Explore expanded seating at MCS	Board with Sunday Services Committee After options are exhausted, task force should be created to explore second service
3. Explore options to attract diverse interests	Minister with Sunday Services, Religious Education (RE), and Membership committees
4. Explore outside speakers and musicians	Sunday Services and Music Director/Music Advisory Committee
5. Improve signage & web site	Meeting House and Communications Committees
6. Build a Welcoming/Green sanctuary	Building and Capital Campaign Committees
<b><i>Goal B: Nurture people within UUCUV</i></b>	
1. Include all sources of UU faith in our services	Minister and Sunday Services Committee
2. Develop a worship associates program	Board decision
3. Increase youth participation in services	Minister, Sunday Services and RE committees
4. Increase musical component with youth participation	Music Director/Music Advisory, and RE Committees
5. Develop feedback system to gather and respond to comments about our services	Board and Sunday Service Committee

<b>Religious Education:</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal A: Children's Sunday School</i></b>	
1. Increase staff as program grows	Board Decision based on RE Committee proposal
2. Develop publicity strategy for attracting young families	RE and Communications Committee
<b><i>Goal B: Youth Programs</i></b>	
1. Develop youth conference	RE Committee and Director of Religious Education (DRE)
2. Develop youth liaison position on the Board and train and support the liaison	Board decision after consultation with DRE
3. Plan youth field trips	RE Committee and DRE
4. Develop joint projects and other connections to sustainability efforts	RE and Sustainability Committees

<b>Religious Education: (cont.)</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal C: Young Adult Programs</i></b>	
1. Provide opportunities for young adults to connect with UUCUV community	RE, Social Responsibility, and Sustainability Committees
2. Facilitate connections with local colleges	RE Committee
<b><i>Goal D: Adult Education Program</i></b>	
1. Create adult education opportunities to draw on all sources of faith and UU traditions	Minister, DRE and RE Committee
2. Expand opportunities for adult education	Minister, DRE, and RE Committee
3. Sponsor presentations to Upper Valley Community	Minister and Leadership

<b>Caring Community:</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal A: Cultivate deep relationships as we grow</i></b>	
1. Mentors for new members	Membership Committee
2. Nurture Chalice Circle program	Membership Committee
3. Foster interest and neighborhood groups	Membership Committee
4. Create updated photo directory	Communications Committee
<b><i>Goal B: Promote ministry to each other</i></b>	
1. Create Caring Community Network	Cares & Concern Committee
2. Recruit and train responders	Cares & Concern Committee
3. Develop & maintain database of responders	Membership, Cares & Concern, and Communications Committee
4. Include Caring Community on website	Communications Committee
<b><i>Goal C: Foster respectful relationships within UUCUV</i></b>	
1. Develop a Safety Policy	RE Committee
2. Develop a Beloved Community Covenant	Board to establish a task force to spearhead covenant process to present proposal to congregation
3. Establish conflict resolution procedures	Covenant task force to present proposal to congregation
4. Integrate covenant into UUCUV culture	Board and Leadership
<b><i>Goal D: Be known as vibrant community</i></b>	
1. Promote quality of congregational life	Communications Committee and Leadership
2. Offer variety of opportunities for socializing	Leadership
3. Emphasize communication with wider community	Communications Committee

<b>Social Action:</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal A: Strengthen organization to support social action</i></b>	
1. Revitalize Social Responsibility Committee	Board and Nominating Committee
2. Recruit and train leaders for social action program	Board and Nominating Committee
3. Create a clearing house of social action opportunities	Social Responsibility committee
4. Improve communication of social action projects and accomplishments	Social Responsibility and Communications Committees
<b><i>Goal B: Expand congregation's social action programs</i></b>	
1. Expand identity as Green Sanctuary and Welcoming Congregation	Sustainability and Communications Committees
2. Utilize United Valley Interfaith Project	Minister and Social Responsibility Committee
3. Participate in Tucker Foundation projects with students	Minister, DRE, and Sustainability Committee
4. Invite social action speakers	Sustainability and Social Responsibility Committees
<b><i>Goal C: Continue to grow UUCUV charitable giving program</i></b>	
1. Use fund raising for out reach rather than for operating budget	Board, Finance and Ways & Means Committees
2. Donate Sunday service collection to Social Action organizations	Board, Social Responsibility, Finance, and Sunday Services Committees
3. Explore social action in global community	Social Responsibility Community
<b><i>Goal D: Foster individual social action</i></b>	
1. Hold regular events to celebrate stories of individual social action	Social Responsibility Committee
2. Make a thermometer to track hours of individual service	Social Responsibility Committee
3. Include social action information on database	Communications Committee
4. Celebrate individual social action accomplishments	Social Responsibility and Communications Committees

<b>Resources:</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal A: Stewardship of Human Resources</i></b>	
1-a. Development of Volunteers: recruitment, training, & support of volunteers	Nominating Committee
1-b. Develop data base of interests	Membership Committee with Administrative Assistant
1-c. Explore creation of Coordinator of Volunteers	Board decision
1-d. Commitment to keep leadership development money in budget	Board and Finance Committee
2-a. Maintain Personnel Committee for support of paid staff	Board appoints Personnel Committee
2-b. Review and increase staff levels as UUCUV grows	Board decision
3-a. Maintain Committee on Ministry to support called Minister	Board appoints Committee on Ministry
3-b. Training for Committee on Ministry	Board to approve training opportunities at District or UUA level
3-c. Move to expanded evaluation of Ministry beyond evaluation of Minister	Committee on Ministry and Sunday Services Committee
<b><i>Goal B: Stewardship of Financial Resources</i></b>	
1. Year-round Stewardship model	Stewardship Committee
2. Build endowment and planned giving vehicles	Finance Committee
3. Connect Budget with annual campaign	Finance Committee and Stewardship Committee
4. Move fund-raising out of operating budget and use for social action	Ways & Means, Finance Committee, and Board
5. Rebuild reserves for major repairs	Finance Committee and Board
6. Launch Capital Campaign for sanctuary	Capital Campaign Committee and Board

<b>Resources: (cont.)</b>	<b>Suggested Assignment of Responsibility</b>
<b><i>Goal C: Stewardship of Physical Resources</i></b>	
1-a. Keep Meeting House sustainable and welcoming	Meeting House and Sustainability Committees
1-b. Maintain Spirit in Nature Trail	Meeting House and Sustainability Committees
1-c. Maintain and upgrade office equipment	Board, Finance Committee, and Administrative Assistant
1-d. Improve signage	Meeting House, Communications Committees and Board
1-e. Finalize Safety Plan and implement it	Religious Education, Meeting House Committees, and Board
2. Plan for new sanctuary	Building, Capital Campaign Committees, and Board