

STRATEGIC PLAN 2017-2022



Table of Contents

Introduction	2
<u>Goal I. The Board of Trustees will initiate an inclusive process to examine our current foundational documents and update and add to them to reflect the current and widely accepted views of the fellowship.</u>	4
<u>Goal II: Develop, preserve, and deepen relationships among the congregation</u>	4
<u>Goal III. Build out the campus to accommodate space and facility needs that would be required to support UUFD growth to 250-300 members in five years. The emphasis shall be on creating the long-term picture of what types of facilities and staffing will best serve our members, the community and the furthering of UUFD’s mission. The growth assumptions stated in the strategic plan document will guide campus development work.</u>	5
<u>Goal IV: Ensure the financial health of UUFD now and into the future</u>	7
<u>Goal V: Provide faith formation opportunities to meet the needs of people of all ages</u>	8
<u>Goal VI: Increase UUFD’s exposure to potential members in the community at large to share our values and expand the impact of our mission</u>	9
<u>Goal VII: Develop UUFD’s identity as a four corners hub for UU</u>	9
<u>Goal VIII: Focus and clarify our social justice mission</u>	10
<u>Goal IX: Build processes to increase multi culturalism and awareness, reduce conscious and unconscious racism, grow intercultural competency, understanding and appreciation of diverse cultures and class issues</u>	10
<u>Goal X. Implement short term action steps to support the summit theme of living our environmental values in order to serve our growing fellowship, our community, and our mission.....</u>	11
<u>Goal XI: Implement long-term action steps to support the summit theme of living our environmental values in order to serve our growing fellowship, our community, and our mission</u>	12
<u>Addendum: Potential activities to support Goal VI, Objective B</u>	12

UUFD STRATEGIC PLAN 2017-2022

Approved by the UUFD Board of Trustees August 24, 2017

UUFD's mission is to:

- Provide a home for liberal religion, spiritual exploration and personal growth.
- Provide lifespan religious education that draws on multiple sources and explores religious, spiritual, intellectual and ethical questions.
- Work toward a community with peace, liberty and justice for all.

The living tradition we share draws from many sources:

- Direct experience of that transcending mystery and wonder, affirmed in all cultures, which moves us to a renewal of the spirit and an openness to the forces which create and uphold life;
- Words and deeds of prophetic people, which challenge us to confront powers and structures of evil with justice, compassion and the transforming power of love;
- Wisdom from the world's religions, which inspires us in our ethical and spiritual life;
- Jewish and Christian teachings which call us to respond to God's love by loving our neighbors as ourselves;
- Humanist teachings which counsel us to heed the guidance of reason and the results of science, and warn us against idolatries of the mind and spirit; and
- Spiritual teachings of earth-centered traditions that celebrate the sacred circle of life and instruct us to live in harmony with the rhythms of nature.

We covenant to affirm and promote:

- The inherent worth and dignity of every person,
- Justice, equity, and compassion in human relations,
- Acceptance of one another and encouragement of spiritual growth in our congregations,
- A free and responsible search for truth and meaning,
- The right of conscience and the use of the democratic process within our congregations and in society at large,
- The goal of world community with peace, liberty, and justice for all, and
- Respect for the interdependent web of all existence of which we are a part.

The report from the Strategic Planning Task Force served as the foundation for the initial draft of the UUFD Strategic Plan for 2017-2022. This was the result of a significant coordinated effort by a number of people. The Strategic Planning Steering Committee organized the initial effort leading to the Summit in March 2017, at which over half of our membership participated. Thanks to Rev. Dr. Lawrence Peers for the expert design, Steering Committee consultation and coaching, and facilitation of the Summit.

Steering Committee members were:

Ken Carpenter	Judy Hayes	Chris Lopez	Tom Miller, Convener
Terri Reheman	Aline Schwob	Melissa Stacy	Portia Sykes

Each Task Force member chaired an Action Planning sub-group to build out specific recommendations based on the strategic themes that were identified by those involved in the Summit. Those teams included:

- Expand Faith Formation for children, youth and adults in order to nurture their ongoing personal and spiritual growth (Terri Reheman, Lisa McCorry, Sarah Goodpastor, Sydney Andersen, Elizabeth Long, Dennis Brown, Graham Smith, Sam Rose, Shanan Orndorff, Bonnie Miller)
- Sustain and increase our financial health (Judy Hayes, Tim Miller, Eb Redford, Sam Rose, K Redford, Ken Rice)
- Live our environmental values (Melissa Stacy, Nicci Unsicker, Elizabeth Long, Graham Smith, Nancy Fisher, Marye Jackson, Hanna Dzubinski, Mary Ocken, Julie Jordan, John Lyons, Jeri Sampson, Christa Turnell)
- Expand our community presence and outreach (Portia Sykes, Tim Sullivan, Carolyn Miller, Marilyn Leftwich)
- Plan appropriately for growth and expansion (Tom Miller, Lois Carpenter, Eb Redford, Warren Unsicker, Teresa Jordan, John Redemske, Lisa McCorry, Aline Schwob)
- Preserve and deepen relationships among the congregation (Ken Carpenter, Susan Koonce, Sam Rose, Nancy Fisher, John Schwob, Carolyn Miller, Dennis McClure, Marsha Porter-Norton)
- Foster Social Justice (Aline Schwob, Susan Koonce, Sam Rose, Anna Royer, Bonnie Miller, Elizabeth Long)
- Grow diversity within the Congregation (Chris Lopez, Ken Carpenter, Mary Sison, John Schwob, Anna Royer, Suzanna Jones, Grace Wilmes)

The recommendations of each team were incorporated into an initial draft document for the Board's consideration. The Board reviewed those recommendations and created a second draft that streamlined the initial document. The second version eliminated short term recommendations which were essentially already in place or not future focused, consolidated several which had overlapping objectives or tasks, edited out unnecessary detail, and added one goal which was not addressed by the Summit meeting but which the Board viewed as foundational to include as an immediate priority. The Board circulated the second draft of the Strategic Plan among key constituent groups for further vetting. The current version is the document that will guide the Fellowship's mission activities for the period 2017-2022. The Board will work with the Ministerial staff and other leaders and members to develop a priority plan for implementing the action steps outlined in the tasks section of each goal. In addition, the Board will review the plan at least annually to assess progress and adjust it to reflect goal accomplishment or changed circumstances that require revision.

Strategic Plan: Goals, Objectives and Tasks

GOAL I. THE BOARD OF TRUSTEES WILL INITIATE AN INCLUSIVE PROCESS TO EXAMINE OUR CURRENT FOUNDATIONAL DOCUMENTS AND UPDATE AND ADD TO THEM TO REFLECT THE CURRENT AND WIDELY ACCEPTED VIEWS OF THE FELLOWSHIP.

A. Objective: The Fellowship will have a clear, concise and compelling statement of our mission

Task:

The BOT will charge a task force to create and deliver a revised mission by January 1, 2018

B. Objective: The Fellowship will craft and adopt a written covenant

Task:

The BOT and the Minister will design an inclusive process that results in a broadly approved Fellowship Covenant

GOAL II: DEVELOP, PRESERVE, AND DEEPEN RELATIONSHIPS AMONG THE CONGREGATION

A. Objective: Based on the Covenant created above, UUFD Ministry will identify various avenues, both short term and long term, multiple and repeated, which will expand and create new opportunities for members of the Fellowship to build, develop and deepen their relationships.

Tasks:

- Expand and integrate covenant group opportunities for every member
- Create and distribute opportunities for social justice participation
- Develop hospitality activities to address growing member needs

B. Objective: UUFD Ministry will offer multiple and varied opportunities for members of the Fellowship to work together to fulfill the mission of UUFD

Task:

Hire a Membership Coordinator who will actively work on the following goals:

- Create a healthy and engaged congregation by seeing to the care and development of members through visitor support, facilitating volunteer recruitment, identifying members with potential for leadership roles, and record keeping.
- Collaborate with Membership and Leadership Development Committees to continue to build a community of belonging and contribution
- Foster a culture of welcome, in part by Identifying currently available social experiences for new members
- Develop mentor program for new members

GOAL III. BUILD OUT THE CAMPUS TO ACCOMMODATE SPACE AND FACILITY NEEDS THAT WOULD BE REQUIRED TO SUPPORT UUFD GROWTH TO 250-300 MEMBERS IN FIVE YEARS. THE EMPHASIS SHALL BE ON CREATING THE LONG-TERM PICTURE OF WHAT TYPES OF FACILITIES AND STAFFING WILL BEST SERVE OUR MEMBERS, THE COMMUNITY AND THE FURTHERING OF UUFD'S MISSION. THE GROWTH ASSUMPTIONS STATED IN THE STRATEGIC PLAN DOCUMENT WILL GUIDE CAMPUS DEVELOPMENT WORK.

A. Objective: Campus building and/or renovations will:

- Create attractive fellowship space to allow for comfortable gatherings of up to 250 people, including adequate food preparation and storage areas
- Meet the needs and requirements for Faith Formation spaces suitable for all age groups
- Create Sanctuary space to accommodate 200 regular attendees
- Allow for separate, up to date AV space and equipment to support activities in the Sanctuary and the rest of the UUFD campus (see detail suggestions below)
- Create adequate office space for staff and volunteers needed to support a congregation of 250-300 members
- Include options for adequate parking for the facility
- Be built as much as possible according to green principles and Green Sanctuary guidelines

Tasks:

1. Convene a Facility Planning Task Force (FPTF) to define specific long-term space requirements and characteristics, engaging as much as possible the most significant staff and volunteer users of the facilities to ascertain their needs and desires.
2. Once the overall facility and capacity needs have been identified, engage the services of an architect to explore various options, including relocation, and develop conceptual drawings and ballpark construction costs for the long term space needs utilizing both a non-contiguous and contiguous facility design
3. Provide sufficient conceptual drawings and information to enable the fellowship to review and discuss the various long-term design options.
4. Develop a process to decide whether a non-contiguous or contiguous facility design approach will best serve to deliver the mission of UUFD for the long-term
5. Once that decision is made, create a process to decide the best option among the options considered
6. Engage the services of an architect to develop detailed architectural drawings of the chosen long-term facility approach in order to get firmer construction costs.
7. Provide the information necessary for the fellowship to review and discuss detailed proposed facility drawings and costs. These could form the basis for materials that would support the anticipated capital campaign to build the recommended facility
8. Build the recommended facility improvements

B. Objective: Determine the best way to increase our short term ability to serve our increasingly larger Sunday service attendance while the long term facility expansion is being planned

Tasks:

1. The Worship Arts Team will define the conditions which would require moving to two services
2. The Worship Arts Team will evaluate and recommend to the BOT potential short-term options for increasing space (e.g. expansion of the rear of the sanctuary, removing chancel closet and office at front of Sanctuary)
3. The Worship Arts Team will develop a plan for executing appropriate changes to best meet fellowship needs.

C. Objective: As modification plans to all facilities are being developed, incorporate changes for use of the facilities that best accommodate both our needs and our resources.

Task:

Implement facility changes that support variable uses by different size and age groups and multiple uses.

D. Objective: Provide members of the Fellowship with enough knowledge of facility needs and planning so that support and investment in the changes are possible.

Task:

Develop and implement a communication plan with the UUFD Communication Team that keeps the Fellowship informed and included.

E. Objective: Implement financing of UUFD facilities that maximizes both long term and short term potential.

Tasks:

1. Plan financing for short-term improvements in a manner that is unlikely to inhibit giving for a larger, long-term facility improvement plan
2. Based on the work of the FPTF and the drawings submitted by the architect, create a capital campaign to generate the resources necessary to fund recommended and approved expansion activities

F. Objective: Ensure appropriate support to Minister and Staff to provide and oversee our ministry activities.

Tasks:

1. Increase staffing within Faith Formation program to adequately support expected attendance
2. Increase other staff and staffing hours as needed to provide adequate support for the accomplishing the Fellowship's mission activities
3. Offer minister intern position if recommended by Minister
4. Hire associate minister as Minister determines need and finances permit

G. Objective: Information Technology group will review the following options and make recommendations to enhance and expand the worship experience and technical capability:

Task:

1. Install video screens in the sanctuary
2. Broadcast live streaming of Sunday services
3. Provide adequate space for A-V controls and Sound Assistant
4. Install fiber-optic connections among campus buildings for integrated and fast communications and web access

GOAL IV: ENSURE THE FINANCIAL HEALTH OF UUFD NOW AND INTO THE FUTURE

A. Objective: Mount and execute a capital campaign to fund the campus plan created as a result of Goal III.

Tasks:

1. The BOT shall create and charge a Capital Campaign Task Force (CCTF)
2. The CCTF will consider use of outside consultants to assist in their efforts
3. The CCTF will Investigate past successes and approaches within and outside UUFD
4. The CCTF will select the strategy for the campaign and coordinate with other UUFD leaders and Fellowship activities and events

B. Objective: Continue with the annual stewardship program.

Task:

1. Identify creative and innovative approaches to communicating with individuals as well as the whole congregation their stewardship participation.
2. The BOT shall name 2 co-chairs for the Stewardship Committee with 2 year overlapping terms to build continuity in stewardship activities.

C. Objective: Consider other avenues for raising funds for specific purposes or activities.

Tasks:

1. Continue producing FROLIC on a biennial schedule, the proceeds from which will go to Board designated projects
2. Consider marketing Frolic to the outside community.
3. Develop and appoint manager for an E-bay account for an ongoing “garage sale” for UUFD.
4. Promote on-line giving for specific purposes.
5. Consider non-intrusive giving approaches in addition to UUFD participation in Amazon Smile
6. As confidence in the growth of the fellowship increases, consideration of the conservative use of debt to more efficiently achieve capital goals should be viable.

D. Objective: Institute and publicize a planned giving policy to significantly enlarge the UUFD endowment

Additional Considerations:

- Given the size of such a campaign and its demands on the congregation, careful consideration should be given to other incremental fundraising activities as these could lead to “donation fatigue”.

-
- Donor incentives and recognition should be considered to stimulate endowments.

GOAL V: PROVIDE FAITH FORMATION OPPORTUNITIES TO MEET THE NEEDS OF PEOPLE OF ALL AGES

A. Objective: Collect and assess data on what types of faith formation activities people want, what works, and what doesn't work to result in a comprehensive plan for Faith Formation offerings for all ages.

Tasks:

1. The Faith Formation Team will identify different approaches that would appeal to individuals across the lifespan and present a plan for programming to increase participation.
2. Develop and administer a survey to discern key characteristics and conditions of desired faith formation opportunities and small group ministries.
3. Continue to analyze data that will inform the design of Faith Formation opportunities and communicate these to the Fellowship

B. Objective: The Minister and the Director of Faith Formation will work together and with the Faith Formation Team to establish consistent faith formation classes for children and youth that provide continuity in curriculum and teachers and ensure a safe and engaging environment.

Tasks:

1. Expand faith formation paid staff
2. As numbers, and resources increase, establish children's classrooms with no more than a 2-year grade span.
3. Create teams for each age group with lead teachers and congregational assistants.
4. Identify barriers and opportunities for potential congregational volunteers.
5. Explore different times for faith formation classes so that adults do not have to miss Sunday services to volunteer in classrooms.

C. Objective: Re-design faith formation space within the UUFD campus.

Tasks:

1. Plan the use of faith formation space to meet different developmental needs of age groups.
2. Create a nursery space large enough to appropriately care for infants and toddlers adjacent to the Sanctuary.
3. Faith Formation Team will recommend appropriate and needed upgrades to outdoor activity spaces.

Goal VI: INCREASE UUFD’S EXPOSURE TO POTENTIAL MEMBERS IN THE COMMUNITY AT LARGE TO SHARE OUR VALUES AND EXPAND THE IMPACT OF OUR MISSION

A. Objective: Diversify and increase the number of outlets in media to reach a broader range of people as well as to increase the number of “touches”. Some people will respond by seeing just one mention of us. Others need to see our name come up repeatedly in multiple places before making the move to check us out.

Tasks:

1. **Social Media** Expand our presence on Facebook, Instagram, and other appropriate digital avenues; boost exposure thru ads for UU events and inspirational messages.
2. **Print Media:**
 - Continue ads in the Durango Herald and other local area newspapers / TALON in NM, Mancos, Bayfield
 - Place op-eds in the newspapers (e.g. summaries of already-written material by Rev. Katie and others, comments on current issues such as immigration, LGBTQ issues, social justice topics in general)
 - Write letters to the Editor mentioning UUFD programs, values and reaction to current local events.
 - Post flyers at community venues with notification of services, programs and events.
 - Create appropriate lawn signs indicating our values.
 - Create and send mailers, specifically postcards inviting Durangoans to Easter or Christmas services.
3. **Radio:** Arrange for mention of UUFD activities on KSUT (public radio) and KDUR (campus radio). Both will negotiate for spots on their broadcasts.
4. **Commercials**
 - Place ads on local TV station
 - Place ads in movie playhouse before show starts
5. Evaluate the cost effectiveness of the above activities and prioritize them for maximum effect

B. Objective: Each team or committee will seek out appropriate opportunities to share our UU values and UUFD priorities with members of the larger community. (See addendum for suggestions)

Goal VII: DEVELOP UUFD’S IDENTITY AS A FOUR CORNERS HUB FOR UU

Objective: Grow Unitarian-Universalism in the Four Corners area

Tasks:

1. Provide opportunities for people outside Durango to dialog and/or participate at a distance
2. Create Online Website for Live-Streaming Sunday Services along with advertising to expand our reach
3. Consider the possibility of a name change from UUFD to reflect the regional scope of our mission

GOAL VIII: FOCUS AND CLARIFY OUR SOCIAL JUSTICE MISSION

A. Objective: Continue to provide and refine a consistent and common communication of Social Responsibility and Justice program efforts at UUFD.

Tasks:

1. Continue the SRJ table on Sunday morning.
2. Develop visuals of past, current, and future SRJ projects to be prominently displayed
3. Place occasional handouts in the Sunday program.
4. Ensure appropriate social justice information is on the website, including contact persons, including information about the broader social justice efforts of the UUA
5. Periodically poll members regarding their priorities, interest, willingness to participate, and skills in SRJ; use data from poll to determine areas for reduced or increased focus in programming.

B. Objective: Expand our volunteer commitments to our SRJ priorities.

Tasks:

1. Continue our volunteer activities with the local organizations consistent with our mission
2. Expand Welcoming Congregation activities and education
3. Create new projects to explore unmet needs in the community, e.g. Durango Learning Lab.
4. Unless polls reveal a change in Fellowship priorities, continue and broaden Healing Racism and LGBTQ, Basic Needs and Immigration programs.

C. Objective: Ensure that social justice values and principles are enmeshed in all our governance and ministry work.

Tasks:

1. Collaborate with strategic planning mission statement work to assure foundational priority for social justice.
2. Work with Faith Formation to choose and implement curricula that include our social justice principles to result in putting those principles into action.
3. Provide opportunities at the Leadership Council level for education and development regarding leadership for our social justice mission.

GOAL IX: BUILD PROCESSES TO INCREASE MULTI CULTURALISM AND AWARENESS, REDUCE CONSCIOUS AND UNCONSCIOUS RACISM, GROW INTERCULTURAL COMPETENCY, UNDERSTANDING AND APPRECIATION OF DIVERSE CULTURES AND CLASS ISSUES

A. Objective: Engage in learning processes to better understand what it means to become multi-culturally competent

Tasks:

1. Reach out to the UUA for guidance on Diversity Inclusion. Examine what is working elsewhere, what is not working.

-
2. Charge Membership and Communications Committees to collaborate on a plan for becoming more inclusive.
 3. Continue and grow the Healing Racism group and encourage its members to increase their programmatic and behavioral responses in the service of Goal IX.

B. Objective: UUFD becomes an increasingly diverse congregation with ideas, events and participation reflecting this diversity.

Tasks:

1. Minister and Worship Arts Team design special services where members invite people of diverse backgrounds (friends and acquaintances) to the service designed to encourage engagement/interest.
2. Minister and Worship Arts Team invite guest speakers of diverse cultures and/ or beliefs to speak on important issues. Publicize those services to attract a more diverse audience.
3. Start a Diversity Inclusion group to meet quarterly to gauge progress and keep the momentum moving forward.
4. Plan a community project with large UU participation in an area where a diverse population would benefit from our service.
5. Survey members/friends about what attracted them to UU. This could provide insight into what is important to others and what might be missing.
6. Recruit, train, and hire a person of diverse background as a member of staff in the future.

C. Objective: The Fellowship engages in behaviors that reduce the perception of elitism

Tasks:

1. Continue to use diverse sources (including those historically marginalized like people of color and indigenous voices) for worship topics, readings, sermons.
2. Broaden the stewardship message to encourage and remind people that all levels of income and resources are welcome and needed for our success.
3. Continue to choose from a variety of sources, composers, genres and styles for music and singing during worship.

GOAL X. IMPLEMENT SHORT TERM ACTION STEPS TO SUPPORT THE SUMMIT THEME OF LIVING OUR ENVIRONMENTAL VALUES IN ORDER TO SERVE OUR GROWING FELLOWSHIP, OUR COMMUNITY, AND OUR MISSION

Objective: Establish an organizing UUFD team(s) to research, select, prioritize, and implement a timeline of action to positively impact our environmental footprint.

Tasks:

1. Create on-line resource to educate members about green and sustainable consumer choices
2. Improve our recycling program

-
3. Provide opportunities for members to collect and share data about activities and resources for sustainable living, environmental awareness and ecological concerns that can become a members' on-line resource of 'green' network connections
 4. Assess need and utility of a carpooling program for Sunday services

GOAL XI: IMPLEMENT LONG-TERM ACTION STEPS TO SUPPORT THE SUMMIT THEME OF LIVING OUR ENVIRONMENTAL VALUES IN ORDER TO SERVE OUR GROWING FELLOWSHIP, OUR COMMUNITY, AND OUR MISSION.

Objective: Establish an organizing team(s) UUFD team to research, select and coordinate implementation of robust environmental procedures and programs.

Tasks:

1. Pursue certification as a UUA Green Sanctuary
2. Explore a partnership Community Garden using city space at the edge of the UUFD parking lot.
3. Explore a bear-smart composting program for the UUFD, either on our own property or partner with the community in a composting program.
4. Move toward 100% renewable energy on UUFD campus, using resources such as solar panels or enrolling the UUFD in a solar garden.

Addendum (potential activities to support Goal VI, Objective B)

Suggestions for outreach

1. Participate in parades around the area (SnowDown, Gay Pride, 4th of July, Memorial Day, Fiesta Days)
 - a. Participate in Festivals and Conventions around the area (Bayfield Heritage Days, Mancos Days, Whole Expo, Earth Day celebrations, Arts Fairs, etc.) Booths and tables set up. Mailing List opportunity for new prospects.
 - b. Conduct UUFD Open House - Invite the Public and especially the neighborhood to attend during summer or fall, using both indoor and outdoor space. Offer activities for children, food, music, tours, workshops, sign-ups. Invite local non-profits and service organizations to set up a table. Additional considerations: Annual Event? Time it with the Opening of Columbine House? Sanctuary Expansion? Arrival of Solar Panels?
 - c. Participate in marches and protests that are consistent with our mission and values – Standing on the Side of Love volunteers
 - d. Coordinate with Fort Lewis College
 - ✓ Contact campus ministry for outreach opportunities and for schedule of events
 - ✓ Continue and expand work with Environmental Center at FLC on marches, events, speaking opportunities
 - ✓ Contact campus groups which support minority students (Native American Center, Muchos Colores, African-American student group, etc.) for opportunities to speak and/or circulate UUFD flyers and information
 - ✓ Figure out a system to help transport students from campus or near campus to the UU church for Sunday service and events/meetings at Bowman Hall

-
- e. Coordinate with Local Organizations
 - ✓ Ask organizations that we support and are involved with for outreach opportunities within their group. Mention UUFD in their newsletters, social media and other electronic messages and notifications, perhaps include our logo on their official documents as a supportive partner. Examples: Companeros, Rainbow Youth Center, FLC Environmental Center
 - f. Obtain a van for Community Use
 - ✓ Use for transport of FLC students and others, as well as trips to various out of town events. Magnetic signs on the side will provide increased exposure and visibility
 - g. Initiate/increase contact with Seniors
 - ✓ Work with Sheila Casey at the La Plata County Senior Center for opportunities to connect with seniors, e.g. speaking opportunities, performance/entertainment opportunities such as the Diversitones singing, workshops and classes.
 - h. Families
 - ✓ Contact home-school organizations, “mommy groups”, Family Center, Women’s Resource Center with information about the “family-friendly” and “child-friendly” atmosphere at UUFD and the educational opportunities
 - i. Manna Organization
 - ✓ Contact them for other opportunities for outreach besides helping in the food distribution system. In what other ways could we be helping them and reaching those in need in La Plata County?

NOTES: