

# **FUUSE**

# **Strategic Plan**

# **2008-2013**

Dear Members and Friends:

The Strategic Planning Committee has been meeting regularly since last fall to complete a road map which would guide FUUSE into the future. This document is a direct response to the results of the Survey conducted in January 2008, the Visioning Workshop in February 2008, the work done in 2007, and many interviews. It is comprehensive and intended to be accomplished over the next 5-year period. There is much to be done to create and enhance the structure needed to support our growing church community. Many of these objectives can be done in hours, rather than days or weeks or months, and we will need your involvement to achieve our shared vision.

**We have identified 7 themes: Organization and Structure; Membership; Community Building; Communication; Religious Education; Finances; and Facilities.**

We have created a “Provocative Proposition” for each theme. These are mini-vision statements based on the survey data and the vision you created in February. These are intended to represent the ideal, the future, the “reach statement.” Some of these objectives contain quite a bit of detail about what should be included when action is taken this is to ensure that the objective is clear in its intent and that the outcomes addresses the issues raised in the data used to guide the development of the plan.

Thanks for your involvement and support.

The Strategic Planning Steering Committee

We have not included the target date of each objective here; that final determination will be made by the Committee and the Board and based on your feedback in this session.

# First Unitarian Universalist Society of Exeter Strategic Plan 2008-2013

<b>Our Provocative Proposition for Organization and Structure</b>		<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
<b>Our professional staff and lay leaders effectively coordinate and manage our church programs, activities, and services within a well defined organizational structure with clear roles, responsibilities, and policies.</b>						
1	Review the current structure and create a structure that will support the growth of the congregation and its programs, activities, and services with the goal of reducing the number of committees and creating a more compact and flatter structure.  The Board (The Board Retreat)	<b>9/08</b>				
2	Define the roles and responsibilities of each of the Committees/Councils/Task Forces as identified in the new revised structure. Provide the :”charge” to each official FUUSE Committee or working group.  The Board	<b>9/08</b>				
3	Review the role of the Religious Education Committee and make recommendations.					
4	Define the role of the Board. Assess the need for 9 members and determine the appropriate number needed to effectively execute Board responsibilities. Determine which/how many/ staff need to be in attendance at board meetings.  The Board	<b>9/08</b>				
5	Evaluate the need for the Executive Committee of the Board and if needed define its roles and responsibilities.  The Board	9/08				
6	Review the current and newly edited bylaws, edit as needed, approve and distribute.  The Board	<b>10/08</b>				
7	Review and edit as needed the policy/bylaws on nominating. Consider restoring the name “Nominating Committee” to the Leadership Development Committee. Charge the Nominating Committee with coming up with a plan for engaging members in the work of the church, how we communicate church needs, volunteer opportunities, and leadership  The Board	10/08				

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<b>Our professional staff and lay leaders effectively coordinate and manage our church programs, activities, and services within a well defined organizational structure with clear roles, responsibilities, and policies.</b>						
8	Review and define the role of the Minister including but not limited to decision making responsibilities, management responsibilities, and communication. Implement any recommended changes.  The Board with Kendra	9/08				
9	Review and rewrite the job description of the Office Administrator to include all the current needs of the church and church staff. Clearly define the responsibilities for this role and distribute to all church committees and task forces.  Board Sub Committee & Kendra	Oct 08				
10	Develop a 360 Feedback process for all staff.  A Member of the Board , a member of the Personnel Committee and 1 appointed member of the church	Dec 08				
11	Implement the evaluation process for all staff.	6-09				
12	Review and appropriately edit the job description for the Religious Education Director including but not limited to the Director's role in Adult Religious Education.	9/08				
13	Define the role of the Ministerial Relations Committee and include responsibilities to conduct and deliver the evaluation process, and serve as a liaison between members of the congregation and the ministers.					
14	Review the procedures manual for the routine work of the church and edit as appropriate. Identify the procedures of the church that are executed by many and require some routine execution, such as Sunday collection deposits and determine who is responsible for communicating applicable procedures.					

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	<b>Our professional staff and lay leaders effectively coordinate our church programs, activities, and services within a well defined organizational structure with clear roles, responsibilities, and policies.</b>					
15	Define the expectations and administrative responsibilities of committee chairs.					
16	Create a master calendar of church events in August of each year. Provide to members and post on the web.					
17	Define the responsibilities of office volunteers. Pat, George C, and	9/08				
18	Create a process for forming interest groups among members that are member directed and not part of the formal structure of the church.					
19	Build a single source data base for directories, e-mails, phone numbers, membership status, as well as skills and talents, current responsibilities, giving commitments, and all other relevant information about members and friends. Identify necessary software and budget for same.					
20	Define the bookkeeping and accounting needs and hire a bookkeeper on an hourly wage to track all aspects of the church budget.					
21	Implement the Safe Congregation Policy.	9/08				
22	Create a notebook of structure, bylaws, policies and procedures for each Chair and appropriate other leadership positions.					
23	Conduct an annual fall Leadership Orientation meeting to discuss expectations, communication, and the calendar.					
24	Conduct an annual retreat and training for the Board to orient new members, build skills in decision making, problem solving, and conflict resolution, and ensure the effectiveness of working relationships.					

# First Unitarian Universalist Society of Exeter Strategic Plan 2008-2013

<b>Our Provocative Proposition for Membership</b>		<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
<b>Our cohesive society encourages generosity of spirit, collaboration of skills, and shared obligations to ensure the growth and well being of our church. We fully understand the responsibilities and expectations of membership.</b>						
25	Create a newcomer packet that includes: information about UU; information about FUUSE; information on how to become a member; the structure of our church; the church calendar; and notices of coming events.					
26	Schedule UU 101 to be held annual twice a year.					
27	Discuss and decide about the value of requiring a UU 101 course to become a member. (The Board with input)					
28	Review the current Membership roll and purge the current non-members. Make adjustments as appropriate the to UUA membership fees. Utilize information gathered when calls were made to all members regarding the Visioning Workshop.					
29	Create a process for utilizing members' talents and gifts with the intent of matching members' skills and interests and volunteer needs. Research processes utilized in other churches that have been successful. Include a process for implementation.					
30	Create a mentor program for matching new members with a member of the church in their peer group.					
31	Develop an internal outreach process. Begin with follow up calls to members who have not been in attendance for 3 months or more. Review annual pledges for those expected and missing as a possible indication for withdrawal church life.					
32	Create an exit interview process. Develop a process for identifying members/friends who have left. Develop a set of questions and determine who will interview these people. Develop a process for putting together the data and providing it to the Board on a semi-annual basis.					

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	<b>Our cohesive society encourages generosity of spirit, collaboration of skills, and shared obligations to ensure the growth and well being of our church. We fully understand the responsibilities and expectations of membership.</b>					
33	Create a new member directory. Consider pictures.					
34	Create and a survey to be completed in the spring of 2009 to assess members satisfaction with the direction of the church, gather data on members spiritual orientation, and provide feedback to the Ministerial Committee.					
35	Evaluate the 08-09 reorganization of Worship Committee to Worship Leaders who with the Ministers on worship services, and assist with special services. Make recommendations for adjustments and adjust as needed for 09-10.	6-09				
36	Consider creating a covenant with members that makes clear the expectations of members.					
37	Evaluate the leadership development program and determine the best way to provide leadership development/training for church leaders. Implement recommendations. The Board					

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Our Provocative Proposition for Development of The FUUSE Community:  FUUSE is a spiritual home for members and friends. We engage the unique talents and interests of each member to build community through worship, service, small group ministries, affinity groups, social activities, and intergenerational programs.		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
38	Develop one additional intergenerational program to be held annually such as women and girls.					
39	Organize a Homecoming Supper or other “all church” meal to be held by mid-September. Distribute the calendar for the year and solicit volunteers.					
40	Evaluate the Homecoming Supper and decide whether or not to make it an annual event.					
41	Create an annual schedule for Circle Dinners.					
42	Assess the interest in expanding small group ministries, make recommendations, and expand as interest indicates.					
43	Assess the interest in creating a Men’s Group and if appropriate create a statement of purpose, establish a calendar, and begin.					
44	Define one new Social Justice Initiative for the year 2008-2009.					
45	Define one Social Justice initiative for the year 2009-2010.					
46	Create a Newcomers Committee to work in conjunction with the Ushers to welcome newcomers, accompany them to coffee hour, and introduce them to others members of the church and do a follow up call to each newcomer family.					
47	Develop a “New comer Path to Involvement.” This would be a process to follow up with newcomers who come for the first time. (The Membership Committee)					
48	Evaluate the music program. Make recommendations.		X			

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49	Implement recommendations about the Music Program.		X	X		
50	Create a task force to explore options to make coffee hour more inclusive and comfortable for all members. (A Sub-Committee)					
51	Explore options for a mid-week vespers services, another time for workshop during the week and make recommendations to the Board.		<b>Oct 09</b>			
52	Implement the recommendations on vespers.		<b>Jan 09</b>			
53	Identify and conduct one all church function every month, including existing functions such as the Auction, Mothers and Girls, Homecoming, etc. (The Program Council)					
54	Evaluate the interest in expanding to year round church.			09/ 10		

<b>Our Provocative Proposition for Religious Education:</b>		<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
<b>The FUUSE Religious Education program has a clearly articulated holistic curriculum based on UU Principles, a shared philosophy of religious education and a shared understanding of human spiritual development. Each level of the program engages the children, youth, and adults of our community in learning about our Unitarian-Universalist identity, community outreach, and social justice.</b>						
56	Develop a philosophy, vision, mission, structure, and covenant for FUUSE Religious Education.	X				
57	Develop and conduct a church-wide survey on religious education to get feedback on programs, staff, budget, and expectations from church members, parents, and students. Include a separate section for parental responses. Provide feedback to the entire church on the results of this survey.	X				
58	Identify what we want kids to learn through the RE Program by high school graduation. Create a scope and sequence, using developmental levels and based on UU Principles.	X				
59	Create a life-span religious education council to guide policies, planning and budget development.	X				
60	Develop a curriculum review process.	X				
61	Create a praxis circle (spiritual education sub-committees) to plan and manage the various activities of the religious education program.	X				
62	Assess the intergenerational opportunities in the curriculum and plan additional intergenerational options.					
63	Develop a process for educating the church at large about the RE program goals and activities.	X				

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	<p><b>Our Provocative Proposition for Religious Education continued:</b></p> <p><b>The FUUSE religious education program has a clearly articulated holistic curriculum based on UU Principles, a shared philosophy of religious education and a shared understanding of human spiritual development. Each level of the program engages the children, youth, and adults of our community in learning about our Unitarian-Universalist identity, community outreach, and social justice.</b></p>	<p><b>2008-2009</b></p>	<p><b>2009-2010</b></p>	<p><b>2010-2011</b></p>	<p><b>2011-2012</b></p>	<p><b>2012-2013</b></p>
64	Conduct a complete curriculum review of the K-3 Religious Education Curriculum and note alignments and discrepancies with the philosophy, vision, mission and covenant. Make recommendations.					
65	Create developmental criteria for the curricula for the K-3 level.					
66	Complete a written curriculum for Grades K-3.					
67	Implement the new K-3 curriculum.					
68	Conduct a complete curriculum review of the Grades 4-5 Religious Education Curriculum and note alignments and discrepancies with the philosophy, vision, mission and covenant. Make recommendations.					
69	Complete a written curriculum for Grades 4-5.					
70	Implement the new Grades 4-5 curriculum.					
71	Conduct a complete curriculum review of the Grades 6-8 Religious Education Curriculum and note alignments and discrepancies with the philosophy, vision, mission and covenant. Make recommendations.					
72	Develop Curricula for Grades 6-8.					
73	Implement new curriculum for Grades 6-8					

	<p><b>Our Provocative Proposition for Religious Education continued:</b></p> <p><b>The FUUSE religious education program has a clearly articulated holistic curriculum based on UU Principles, a shared philosophy of religious education and a shared understanding of human spiritual development. Each level of the program engages the children, youth, and adults of our community in learning about our Unitarian-Universalist identity, community outreach, and social justice.</b></p>	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
74	Conduct a complete curriculum review of the Grades 9-12 Religious Education Curriculum and note alignments and discrepancies with the philosophy, vision, mission and covenant. Make recommendations.					
75	Revise and develop curricula for Grades 9-12.					
76	Implement changes to curriculum for Grades 9-12					
77	Conduct a complete curriculum review of the program from 0 -K and note alignments and discrepancies with the philosophy, vision, mission and covenant. Make recommendations.					
78	Create a developmentally appropriate program for ages 0-K.					
79	Implement changes to the 0-K program.					
80	Explore options for involvement with other UU churches					
81	Evaluate the Adult Education Programs for 2008-2009. Make recommendations.	6/09				
82	Implement recommendations on Adult Education 2009-2010		X			
83	Create a process to introduce children to worship in the adult community.					

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	<p><b>Our Provocative Proposition for Religious Education continued:</b></p> <p><b>The FUUSE religious education program has a clearly articulated holistic curriculum based on UU Principles, a shared philosophy of religious education and a shared understanding of human spiritual development. Each level of the program engages the children, youth, and adults of our community in learning about our Unitarian-Universalist identity, community outreach, and social justice.</b></p>					
84	Implement the process for introducing children to workshop in the adult community.					
85	Explore the options for collaborating with other Exeter Church Youth Groups.					
86	Create a summer camp program for school age program.					

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<b>Our Provocative Proposition for Communication</b>		<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
<b>Open communication at FUUSE is integral to our sense of community. Our leadership and committees are transparent. We keep our congregation well informed and welcome feedback and dialogue from members and friends.</b>						
87	Expand the website to include: the annual calendar; a section where families can post joys and concerns; a section for posting quarterly budget statements; a section for committee reports; a section for Board minutes; a section for feedback to the Board. Web Master					
88	Create a questions and comments box to be left in fellowship hall. Names and phone numbers required. The box will be maintained by the Ministerial Committee.					
89	Create a list of all committees and a brief description of what they do. To be posted on the web and published in the directory. Publish and update quarterly the names of people on each committee.					
90	Create a list of all ways that members and friends can volunteer including hours anticipated for each task. For example, "Make or purchase one meal a year for the Caring Committee. Total time: 2 hours." "Host coffee once a year, which includes providing light snacks either homemade or store bought for adults and kids, juice for kids, and kitchen clean up. Total time 2 hours."					
91	Create a policy for "in church, before service" announcements to be 5 minutes long, delivered on the hour. This is to be used for church-wide event announcements only, not all committees, and no outside church events. Experiment with implementation for two months and evaluate impact.  (The Board)	Sept				
92	Make all sermons available on pod-cast through the website.					

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Our Provocative Proposition for Finances:		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
<p><b>FUUSE Finances are well managed through a transparent budget process. Our budget, funded through an annual pledge drive, is balanced without the use of our investment principal. The budget ensures our ongoing programs and enables us to meet our growth needs.</b></p>						
93	Appoint a Finance Committee. Charge the Finance Committee with making recommendations on: budget oversight, budget development, and budget management, investments, endowments, and audit functions. Make recommendations to the Board of Directors.					
94	Implement the recommendations of Finance Committee.					
95	Determine the process for maintaining a balanced budget, following the investment use policy beginning with the 08-09 calendar year.					
96	Create a timely budget development process. Include appropriate and early engagement with the congregation about budget needs and expenditures. Synchronize budget development, pledging, new membership and the annual meeting.					
97	Create a budget development procedure requiring each committee or entity to justify requests to support realistic budget development.					
98	Review and adjust the budget format so that the budget actuals can be reviewed by the board at its meeting and by the congregation on the website quarterly.					
99	Develop an investment use policy including clear directives for use of these funds and the interest generated.					
100	Develop an audit policy.					
101	Develop an endowment policy.					
102	Develop an endowment communication.					

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103	Develop a policy for annual salary adjustments.					
104	Develop a benefits policy. Include a review of UUA guidelines and determine if FUUSE will follow the UUA guidelines.					
105	Develop a gift policy.					
106	Review the past pledging process and develop a stewardship/pledging process that increases information to members about needs and inspires members to support FUUSE.					
107	Synchronize budget development, pledging, new membership and the annual meeting so there is a natural flow and full disclosure throughout the process.					
108	Evaluate this year's stewardship process and make recommendations for next year. Clarify roles and responsibilities of all throughout the process.					
109	Create a task force to develop a capital campaign to support the vote of the membership in support of the recommendations of the feasibility study.					
110	Implement the capital campaign strategy.					
111	Create a Task Force of two people to gather information on other UU churches and the UUA policies on benefits, salaries, and structures.					
112	Investigate the possibilities for challenge grants, matching donors and make recommendations.					

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<b>Our Provocative Proposition for Space and our Physical Plant:</b>		<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
<b>FUUSE worship services and activities are conducted in a spiritually engaging and welcoming spaces, designed for maximize flexibility. Our facilities include appropriate accommodations for our religious education program, our music program, and our church offices. We have adequate parking; we are accessible; and we are “green.”</b>						
113	Review the current parking situation and present options to the Board for current parking changes to accommodate our elders in the near term.	Sept				
114	Charge the Property Committee with creating a comprehensive assessment of physical plant issues inside and out. Present these findings to the Feasibility Task Force.	Sept				
115	Implement the recommendations of the Board related to parking.	Sept				
116	Create a Feasibility Study Task Force. Include at least one representative from the Finance Committee. Charge the Task Force with assessing all current church needs and conducting a space needs analysis. Determine an estimated ideal square footage based on doubling the current membership with estimated expansion of religious education based on doubling current family enrollments. Research and present the estimated costs of four options: purchasing an existing church building; purchasing land in the area and constructing a new building; tearing down the existing building and building a new one on our property; renovating and adding to the current facility. Estimates should be done by competent professionals such as architects or commercial builders and based on a square foot estimate of space needs. The Feasibility Study should refer to the vision document prepared from the Future Search Visioning Conference in February of 2008. All options must include parking, handicap accessibility, and “green.”	Nov				

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117	Present the Feasibility Task Force findings to an all church meeting, present finds and take a vote on next steps.	Nov				
118	Based on the Feasibility Study recommendations create a Building Planning Committee to create a 5 year plan for the physical plant and space.	Jan 09				
119	Implement year one of the recommendations of the Building Planning Committee.		X			
120	Implement year two of the recommendations of the Building Planning Committee			X		
121	Implement year 3 of the recommendations of the Building Planning Committee.				X	
122	Implement year 4 of the recommendations of the Building Planning Committee					X

