

# **FUUSE**

# **Strategic Plan**

# **2008-2013**

Updated 4/7/09

Updated 4/10/09

Updated 4/13/09

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. At the three-hour workshop May 18 at 12:00 PM, we will provide an opportunity for you to give us feedback on these propositions and the plan itself, and to engage with each other in planning for implementation. This is a very important meeting for our church as we set the sails in the direction of your choosing.

Please support our church community by joining us for a light lunch and fully participating in our planning review and launch. *It will be helpful for you to read this document and make notes about your appreciations, questions, and concerns before you come to the session.*

Thanks, The Strategic Planning Steering Committee

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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.

<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 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 Retreat)		3/10			
2	Define the roles and responsibilities of each of the Committees/Councils/Task Forces as identified in the new revised structure. (The Board Retreat)		8/09			
3	<b>Part 1.</b> Define the role of the Board. Assess the need for 9 members and determine the appropriate number needed to effectively execute Board responsibilities. <b>Part II :</b> Determine which/how many/ staff need to be in attendance at board meetings. (The Board Retreat)	COMPLETE Pt. 1	8/09 Pt. 2			
4	Evaluate the need for the Executive Committee of the Board and if needed define its roles and responsibilities. (The Board Retreat)	COMPLETE				
5	<b>Pt. 1</b> Create a Task Force to include at least one member of the Board and one member of the Program Council to review the bylaws, edit as needed and make recommendations for changes. <b>Pt. 2 - Congregation to vote 10/09</b>		10/09			
6	Review and edit as needed the policy/bylaws on nominating. Consider restoring the name "Nominating Committee" to the Leadership Development Committee.		COMPLETE			
7	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. <b>Board to work with</b>		9/09			

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	Personnel Committee on this task.					
8	Determine a process for the 360 degree evaluation of each member of the staff. *board to work with Personnel Committee on this task. ;		*9/0 9*			

Our Provocative Proposition for Organization and Structure		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
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.						
9	Implement the evaluation process for all staff. Assigned to Personnel Committee			1/10		
10	Assess the role of the Religious Education Committee and make recommendations		10/0 9			
11	Review and appropriately edit the job description for the Religious Education Director.		4/09			
12	Evaluate 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.		5/09			
13	Identify the procedures of the church that are executed by many and require some routine execution, such as Sunday collection deposits. Create procedures manual for the routine work of the church.		10/0 9			
14	Define the expectations and administrative responsibilities of committee chairs.		8/09			
15	Define the responsibilities of office volunteers.		6/09			
16	Create a process for forming interest groups among members that are member directed and not part of the formal structure of the church. Assigned to Program Council		9/09			

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17	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.		1/10			
<b>Our Provocative Proposition for Organization and Structure</b> <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>		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
19	Define the bookkeeping and accounting needs and hire a bookkeeper on an hourly wage to track all aspects of the church budget.		9/09			
20	Evaluate need for a full time Director of Education -			1/10		

<p><b>Our Provocative Proposition for Membership * X = target dates. Membership as a whole committee shall meet 4/09 and begin talking about the tasks.</b></p> <p><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 full understand the responsibilities and expectations of membership.</b></p>		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
20	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.		x			
21	Schedule UU 101 to be held annual twice a year. Discuss and decide about the value of requiring a UU 101 course to become a member. (The Board with input)		x			
22	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.		x			
23	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.		x			
24	Create a mentor program for matching new members with a member of the church in their peer group.		x			
25	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. (Membership Committee)		x			
26	Create an exit interview process. (The Membership Committee)		x			



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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, social activities, and intergenerational programs.		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
30	Develop one additional intergenerational program to be held annually such as women and girls.		9/09			
31	Organize a Homecoming Supper or other “all church” meal to be held by mid-September. Distribute the calendar for the year and solicit volunteers.		9/09			
32	Evaluate the Homecoming Supper and decide whether or not to make it an annual event.					
33	Create an annual schedule for Circle Dinners.	Complete				
34	Establish one new “Beyond Coffee Hour” group to convene monthly to discuss sermons.	Complete				
35	Establish a Men’s Group.	Complete				
36	Define one new Social Justice Initiative for the year 2008-2009. <b>Peace</b>	Complete				
37	Define one social justice initiative for the year 2009-2010.		9/09			
38	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. <b>Assigned to Membership</b>		x			

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39	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) * will address with Membership					
<b>Our Provocative Proposition for Development of The FUUSE Community:</b> <b>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, social activities, and intergenerational programs.</b>		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
40	Create a task force to explore options to make coffee hour more inclusive and comfortable for all members. (A Sub-Committee of Fellowship) * to be addressed by Membership		X			
41	Explore options for a mid-week vespers services, another time for workshop during the week and make recommendations to the Board.  (Worship Committee)		9/09			
42	Implement the recommendations of the Worship Committee on vespers.  (The Worship Committee)		9/09			
43	Identify and conduct one all church function every month, including existing functions such as the Auction, Mothers and Girls, Homecoming, etc. (The Program Council) *review again		1/10			
44	Evaluate the interest in expanding to year round church.		1/10			

Our Provocative Proposition for Religious Education:		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
The FUUSE life-span 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.						
45	Develop a philosophy, vision, mission and covenant for FUUSE Religious Education.	complete				
46	Develop a *curriculum review process. * known as Scope and Sequence per DRE. One develops the total scope of the program and then works out the sequence for teaching over a period of years. Curriculum is already written by UUA.	complete				
47	Part 1 - Conduct a complete curriculum review of the K-3 Religious Education Curriculum and note alignments and discrepancies with the philosophy, vision, mission and covenant. Part 2 - Make recommendations.		10/09	10/10		
48	Create developmental criteria for the curricula for the K-3 level.				10/11	
49	Complete a written curriculum for Grades K-3.				10/11	
50	Implement the new K-3 curriculum.				10/11	
51	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.				10/11	
52	Complete a written curriculum for Grades 4-5.				10/11	

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53	Implement the new Grades 4-5 curriculum.				10/11	
	<p><b>Our Provocative Proposition for Religious Education continued:</b></p> <p><b>The FUUSE life-span 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>	<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
54	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.				10/11	
55	Develop Curricula for Grades 6-8.				10/11	
56	Implement new curriculum for Grades 6-8				10/11	
57	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.				10/11	
58	Revise and develop curricula for Grades 9-12.				10/11	
59	Implement changes to curriculum for Grades 9-12				10/11	
60	Develop criteria for an Adult Education Program.			10/10		

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61	Develop curricula for an Adult Education Program.			10/10		
62	Create a life-span religious education council to guide policies, planning and budget development.		9/09			
63	Create a praxis circle (spiritual education sub-committees) to plan and manage the various activities of the religious education program.	complete				

	<b>Our Provocative Proposition for Religious Education continued:</b>	<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
	<b>The FUUSE life-span 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>					
64	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.		10/09			
65	Create a developmentally appropriate program for ages 0-K.			10/10		
66	Implement changes to the 0-K program.				10/11	
67	Explore options for involvement with other UU churches				10/11	
68	Explore the options for collaborating with other Exeter Church Youth Groups.					
69	Create a summer camp program for school age program.					
70	Implement the evaluation process for the Religious Education Director.		12/09			
71	Conduct a survey of all parents of children enrolled in the RE program to assess satisfaction and provide feedback to the RE Director and the RE Committee.		10/09			
72	Create a process to introduce children to worship in the adult community.					

73	Implement the process for introducing children to workshop in the adult community.					
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Our Provocative Proposition for Communication		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
<p><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></p>						
74	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. Change to: ...* <b>The annual calendar; the RE calendar; a section for posting quarterly budget statements; a section for committee reports; a section for questions for the board.</b>	complete				
75	Create a questions and comments box to be left in <b>Parish</b> hall. Names and phone numbers required. The box will be maintained by the Ministerial <b>Relations</b> Committee.	9/09				
76	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. * <b>changed to and on the parsonage bulletin board.</b>	5/09				
77	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.” (The Membership Committee) <b>Research in 2009-2010</b>		6/09			

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78	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) * <b>Program Council recommendations to Board</b>	6/09				
79	Make all sermons available on pod-cast through the website. * <b>evaluate possibility</b>		9/09			
<b>Our Provocative Proposition for Finances:</b>  <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 investments. The budget ensures our ongoing programs and enables us to meet our growth needs.</b>		<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
80	Create a Task Force on Finance Oversight to determine the organizational structure and necessary positions for overseeing Finances and the Budget of the Church. These should include budget oversight, budget development, and budget management, investments, endowments, and audit functions. Make recommendations to the Board of Directors. <b>Doing this in context of the Finance Committee.</b>		Complete 6/10			
81	Implement the recommendations of the Task Force on Finance Oversight. Create and staff the appropriate positions/committees. <b>Doing this in context of the Finance Committee.</b>		Complete 6/10			
82	Determine the process for maintaining a balanced budget, without the use of investments beginning with the 08-09 calendar year. <b>Doing this in context of the Finance Committee. – creating an ‘Operations Manual’</b>		Complete 6/10			
83	Create a timely budget development process for use by each part of the church, requiring each committee or entity to justify requests to support realistic budget development. Include appropriate engagement with the congregation about budget needs and expenditures. <b>Created precedent for FC setting budget ceilings for</b>	Complete				

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	each area and appointed FC liaisons to each.					
84	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. <b>Create plan to achieve this goal.</b>		12/09			
85	Develop an investment policy. <b>Established an investment committee and approve charter – interim investment policy adopted by FUUSE at Meeting in Oct. 2008</b>		Finalize 12/09			
86	Pt. 1 - Develop an audit policy. Created informal audit ‘white papers’ Pt. 2 Consider need for formal audit/funding	Pt. 1 complete	Pt. 2 by 6/10			
87	Develop an endowment policy. <b>Est. investment committee and approved charter – interim investments policy adopted by FUUSE at mtg. in Oct.2008.</b>		Finalize by 6/10			
88	Develop an endowment communication. <b>Created draft communication document.</b>		Approve by 6/10			
	<b>Our Provocative Proposition for Finances:</b>  <b>FUUSE Finances are well managed through a transparent budget process. Our balanced budget ensures our ongoing programs and enables us to meet our growth needs.</b>	<b>2008-2009</b>	<b>2009-2010</b>	<b>2010-2011</b>	<b>2011-2012</b>	<b>2012-2013</b>
89	Develop a policy for annual salary and benefits adjustments. <b>Met with personnel committee and set cost of living increase for FY 2010.</b>	complete				

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90	Develop a gift policy.	Draft	Approve			
91	Synchronize budget development, pledging, new membership and the annual meeting so there is a natural flow and full disclosure throughout the process. Worked with Pledge committee on their goals and activities. <b>Worked with Pledge committee on their goals and activities. Part 2 – Need to document (BOT)</b>	complete	12/09			
92	Evaluate this year’s stewardship process and make recommendations for next year. Clarify roles and responsibilities of all throughout the process. <b>* FC does not consider this a responsibility of the committee - moved to Membership (stewardship)</b>					
93	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. <b>Moved to Board w/ FC in an advisory role.</b>		9/09			
94	Implement the capital campaign strategy.					
95	Create a Task Force of two people to gather information on other UU churches and the UUA policies on benefits, salaries, and structures. <b>*consider implementation</b>		12/09			

Our Provocative Proposition for Space and our Physical Plant:		2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
<p><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></p>						
96	Review the current parking situation and present options to the Board for current parking changes to accommodate our elders in the near term.		9/09			
97	Charge the Property Committee with creating a comprehensive assessment of physical plant issues inside and out. Present these findings to the Feasibility Task Force.		10/09			
98	Implement the recommendations of the Board related to parking.		9/09			
99	<p><b>Part 1:</b> Create a Feasibility Study Task Force. <b>Part 2 :</b> Include at least one representative from the Finance Committee. <b>Part 3:</b> 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. This is not a full architectural study in its first phase, but 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.”</p>	Complete Parts 1,3				
100	Present the Feasibility Task Force findings to an all church meeting, present finds and take a vote on next steps.		5/09			

	<p><b>Our Provocative Proposition for Space and our Physical Plant:</b></p> <p><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></p>	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013
101	Based on the Feasibility Study recommendations create a Building Planning Committee to create a 5 year plan for the physical plant and space.		9/09			
102	Implement year one of the recommendations of the Building Planning Committee.		x			
103	Implement year two of the recommendations of the Building Planning Committee			x		
104	Implement year 3 of the recommendations of the Building Planning Committee.				x	
105	Implement year 4 of the recommendations of the Building Planning Committee					x