
Conejo Valley UU Fellowship Strategic Plan

September 2014

Board of Trustees

Mission

***Our mission is to nurture
spiritually courageous people
who transform the world
through justice and compassion.***

Strategic Paths

Our mission is to nurture spiritually courageous people who transform the world through justice and compassion.

Spirituality

Conduct programs that help people deepen their spirituality through worship, religious education, small group ministry, and daily practice.

Outreach

Increase our presence in the community through service that promotes justice and compassion.

Sustainability

Achieve sustainability through high expectation membership.

Spirituality

Strategic Path
Conduct programs that help people to deepen their spirituality through worship, religious education, small group ministry and daily practice.

Key Initiatives	Owner(s)	Action Plans	Intended Results in 2014-15
Strengthen the healthy functioning of the congregation.	Congregation, Minister, Board, Council, Leadership Cultivation Committee	Apply the Covenant of Good Relations, maintain and promote an active, shared commitment to understanding, fostering, and growing a healthy congregation.	Continuous improvement
Support and enhance excellence in worship.	Minister, Council	Strengthen our infrastructure that supports the Minister in providing consistent, quality worship programs.	Solidifying vital worship resources
Strengthen small group ministry.	Minister, Membership Director	Continue training covenant group leaders; grow the Chalice Circles program.	Expanding engagement
Share our message and community beyond the congregational.	Minister, Outreach & Communication Directors	Build church social media, online platforms; online ministry; grow participation	Upgrading tools, support, content
Strengthen faith development programs.	Minister and DRE	Fill volunteer roster, grow RE offerings and participation, develop youth programming	Strong member involvement

Spirituality

Strategic Path
Conduct programs that help people to deepen their spirituality through worship, religious education, small group ministry and daily practice.

Key Goals and Achievements 2015-16	Key Goals and Achievements 2016-17
Continue, expand, deepen key initiatives.	
<p>Grow youth programs – including educational, social, faith development, cultural, and service opportunities.</p> <p>Deepen and broaden our analysis and application of the annual survey.</p>	<p>Expand Director of Religious Education position to full time, with an adequate professional expense budget.</p> <p>Welcome an Intern Minister.</p> <p>Support participation in the Unitarian Universalist Musicians Network annual conference.</p>

Outreach

Strategic Path
Increase our presence in the broader community through service that promotes justice and compassion.

Key Initiatives	Owner(s)	Action Plans	Intended Results in 2014-15
Grow the congregation's justice, service, and cultural programs.	Congregation, Outreach Director, Membership Director	Support programs serving UU values and our congregation's mission, following member passions.	Increasing participation, visibility, and impact.
Build relationships in the community that promote our values and mission.	Minister, Director of Religious Education, Outreach Director	Grow relationships with MICOP, VC-CLUE, MANNA, other partners, and interfaith programs.	Increasing participation, visibility, and support.
Embody our mission via events and programs for the wider community.	Outreach Director, Minister, Forums team	Ensure vitality of Community Forums and other programs.	Expanding awareness and growth of programs.
Deepen, broaden ties with Unitarian Universalism beyond our Fellowship.	Outreach Director	Participate and raise awareness of UU organizations, programs, events, resources, and history.	Full delegations at DA & GA. Growing awareness and visibility.
Give "Special Collections" as a congregational modern tithe.	Minister, Outreach Director	5% of budget shared with outside causes and organizations.	Achieving or exceeding the "modern tithe" goal

Outreach

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Continue, expand, deepen key initiatives.	
<p>Grow member involvement in programs, including “Standing on the Side of Love” advocacy, Feeding Hands program, Detainee visitations, Income Inequality Study group, Climate Action Team, Mindful Eating, Prisoner Letter-writing, MANNA food collection, MICOP support, and more.</p> <p>Support participation in local community service programs for church youths.</p> <p>Develop standing Congregational Study Action Issue group.</p> <p>Develop mutual aid consortium with 2-3 neighbor congregations.</p>	<p>Provide scholarships for youth to participate in UU College of Social Justice service learning trips.</p>

Sustainability

Strategic Path
Achieve sustainability through high expectation membership.

Key Initiatives	Owner(s)	Action Plans	Intended Results in 2014-15
Achieve a sustaining, balanced budget.	Congregation, Board, Finance Committee	Eliminate budget deficit.	Paying for expenses this fiscal year without drawing from savings
Grow the pool of leaders, enhance the skills of leaders.	Leadership Cultivation Committee	Fully staff volunteer positions; foster healthy teamwork.	Instituting leadership orientation training, continuing to develop the Leadership Cultivation Committee
Ensure transparency in congregational finance.	Board, Finance Committee	Build understanding of church finance.	Hold biannual budget workshops; complete a reciprocal audit with another congregation
Ensure that church policies & procedures address current needs.	Board (Policies), Council (Procedures)	Review and update church policies and procedures.	Revising and publishing the church policies and procedures; making the information easily accessible to members.
Manage facilities to optimize resources and reduce risks.	Operations Director	Analyze energy usage, safety, maintenance, ops/tech resources.	Implementing an Operations Manual. Publishing an emergency safety guide. Reviewing vendor contracts. Assessing facility structure conditions.
Maintain a growing membership.	Minister, Council	Attract and retain members.	5% increase in adult members.
Improve pledge distribution.	Minister, Pledge Committee	Invite modern tithing; lift pledging.	Increasing the average and median pledge levels.

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Continue, expand, deepen key initiatives.	
<p>Achieve full fair compensation standards, as defined by the UUA and UUMA, for professional staff.</p> <p>Establish a management system for congregational contracts, documents, and records.</p> <p>Increase Administrator, Custodian, and Choir Director hours to meet the needs of the congregation.</p> <p>Establish a Long Term Planning Committee.</p>	<p>Pay off deferred rent to OCR.</p> <p>Create a standing budget item to fund annual leadership school scholarships for selected members.</p> <p>Develop a budget surplus / reserve.</p>

Operating Mechanisms

The Board, Council and Staff will operate and report on defined goals developed in support of the Strategic Plan. A Mid-year Leadership retreat will focus on assessing progress.