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# ***Conejo Valley UU Fellowship Strategic Plan***

*April 2013*

*Board of Trustees*

# *Mission*

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***Nurture spiritually courageous  
people who transform the world  
through justice and compassion***

# *Strategic Paths*

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# *Spirituality*

## **Strategic Path**

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

<b>Key Initiatives</b>	<b>Owner(s)</b>	<b>Measure of Success</b>	<b>Estimated Results in 2013</b>
Support and enhance excellence in worship	Minister, Board, Council  Board  Communication Director	Strengthen volunteer infrastructure to the Minister in providing consistent, excellent worship experience; including music, worship associates, creative arts, orders of service, sextons, etc. Apply Unitarian Universalist Ministers Association guidelines for allocation of Minister's time to worship preparation Ensure worship programs are available via online audio and video	Solidify key resources  Implement a time allocation review  Procure tools and begin publishing
Develop small group ministry, and increase engagement in small group programs	Minister  Membership Director, Council	Conduct two six-week covenant group training sessions to develop a team of group leaders Strengthen and increase engagement in congregational life by our members	Plan for Fall 2013 program delivery. Membership Group in operation
Continue thematic ministry	Minister and DRE	Assessment through staff, music, teacher testimonial	Ongoing feedback and assessment
Strengthen RE programs	Minister and DRE	Offer at least three Adult RE classes Determine time for best participation	Completion of three programs

# Outreach

## Strategic Path

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

Key Initiatives	Owner(s)	Measure of Success	Estimated Results in 2013
Align our primary focus and resources with the national “Standing on the Side of Love” advocacy campaigns	Outreach Director	Broad visibility and awareness of “Standing on the Side of Love” campaigns as congregation’s primary Outreach focus	Publish a plan to organize the congregation in support of Standing on the Side of Love
Build programs and community partnerships that promote compassionate immigration reform	Outreach Director	Develop a detainee visitation program and a committee to support it.	First visit to a detention center. At least eight people active as members of the committee.
Support dialog with the greater community about justice and compassion	Outreach Director and Minister	Ensure continued vitality of the Community Forums program. Network with interfaith community.	At least one monthly Forum; fully staffed committee.
Grow member participation and engagement in outreach activities and programs	Outreach Director	Encourage member-led outreach programs that are consistent with our values and enjoy core support groups.	At least 3 member-initiated programs (in addition to the SOSL primary efforts.)
Practice “congregational modern tithe”	Minister, Outreach Director, Board	Give 5% of budget, via “Special Collections,” to causes. Maintain Fair Share contributions to UUA & PSWD	Achieve or exceed “congregational tithe”

# *Sustainability*

## **Strategic Path**

**Achieve sustainability through high expectation membership**

<b>Key Initiatives</b>	<b>Owner(s)</b>	<b>Measure of Success</b>	<b>Estimated Results in 2013</b>
Increase pool of leaders	Board	Number of candidates for leadership roles	Board decides how to proceed with Nominating Committee Leadership Development recommendations
Develop membership engagement metrics	Membership Director	Defined metrics with values measured quarterly	FY 13 – Define metrics and initial values FY 14 – Membership engagement data serves as feedback for the Board
Increase volunteer participation in the running of the fellowship and its programs	Council and Volunteer Coordinator	Adequate staffing of committees and RE teachers	Appoint a Volunteer Coordinator in FY 13; Actual number of volunteers as measured by engagement metric
Address logistical barriers to growth	Operations, Membership, Communication Directors, Board	Recognize and address as they arise. Plan for future needs.	FY 13 – Sort the traffic flow and congestion. Include budget scenarios at annual meeting. FY 14-15: develop and implement options
Support the modern tithe (5% of income to the church, 5% to other causes)	Minister, Board, Council, Pledge Committee	Ability to discuss openly throughout the Fellowship.	Modern tithe incorporated in new member information and canvas communications. Level of pledges increase.
Make progress toward achieving a balanced budget	Board	Reduction of deficit; path to sustainability	FY 13: 75K Deficit; FY 14: 50K Deficit; FY 15: 20K Deficit; FY 16: Balanced Budget

# *Operating Mechanisms*

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1. Board and Council will operate and report on defined goals developed in support of the Strategic Plan.
2. Board/Council pairings to meet at least once a quarter to review progress, objectives, current status, and support.