

Nurture. Honor. Engage.

2024 - 2029 UUCFW Strategic Plan

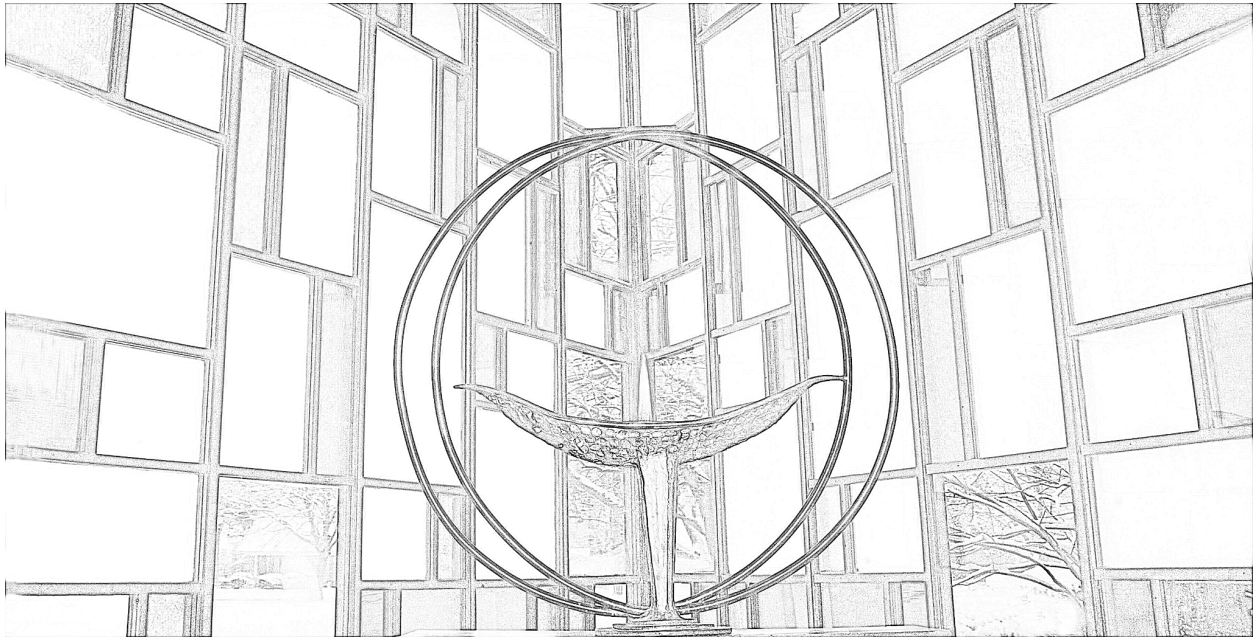


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Thank You

The Strategic Planning Task Force would like to offer our gratitude to the members and friends of the Unitarian Universalist Congregation of Fort Wayne for entrusting us with this work. It has been a labor of love and we are honored to have worked on this project.

We would also like to thank everyone who has participated in this work. Our congregational participation in town halls, listening circles, visioning workshops, and the like made this process possible. Our goals, objectives, strategies, and measures of success are all taken from those conversations.

We are looking forward to working with you all as we begin to move forward on this plan,

Nastassia Snaden, Rebecca Reeder, Dee Koehl, Mary Lybarger, Terri Swim, Lauren Bower, and Chris Tennant

Executive Summary

This Strategic Plan is part of a process that the Unitarian Universalist Congregation of Fort Wayne (UUCFW) began in 2019. It was born when the Building and Grounds Chairs indicated a need for significant repairs or replacement of the windows in the meetinghouse. Because of the expense involved, we established a task force to determine if we were ready and had the capacity for a capital campaign. They invited members into conversation about their wishes regarding the building, and it became apparent that members had a strong bond with our space and wanted to take the necessary steps to repair and retain this location.

We hired Mark Ewert of Stewardship for Us in 2020 to assess our readiness and capacity for a capital campaign. He indicated that we still had significant work to complete before being ready for this step. His advice included creating a congregational vision, continuing to develop the financial stewardship program, clarifying the endowment purpose, and developing a planned giving program.

In 2021, the Stewardship Committee was regrouped to help change the stewardship culture of the UUCFW. Their goal was to make stewardship a year-long process to more responsibly manage things entrusted to our care, including our property, financial, and human resources. The Board of Trustees (BOT) supported the Stewardship Committee in 2023 by adopting a new by-law that allowed for continuity in the Committee and its leadership.

Mark Ewert assisted our Visioning Workshop in 2022. This provided rich information regarding our congregational vision for the future of UUCFW.

Our new Vision has three identifiable parts:

1. We nurture each other as a diverse, intergenerational, and multicultural congregation,
2. We honor a variety of spiritual paths while promoting religious liberty,

3. We intentionally engage in community relationships that champion environmental and social justice.

In November 2022, the BOT established an ad hoc Strategic Planning Task Force (SPTF). This task force has met regularly to create this Strategic Plan to fulfill the mission and vision of our congregation. With the data gathered during the visioning workshops and our previous congregation-wide conversation in mind, the task force organized four specific overarching goals with two addendums for "Accessibility & Adaptability" and "Giving & Generosity":

- **Nurturing Each Other**
To foster a safe and inclusive space for diverse people to build a deep sense of belonging through opportunities for meaningful group engagement and shared personal experiences.
- **Honoring Spiritual Paths**
To strengthen our understanding and connection to the history, principles, and covenants of Unitarian Universalism through intentional educational programming and spiritual practices.
- **Engaging Our Congregation**
To offer opportunities for members and friends to respectfully explore spirituality and sources of wisdom while advocating for religious freedom within the larger community.
- **Engaging Our Community**
To actively engage with and serve our local community by building relationships, identifying shared values, supporting one another in good works, and working collaboratively for justice.
- **Accessibility & Adaptability Addendum**
Plan for new technology and maintenance for improved accessibility and ease of use.
- **Giving & Generosity Addendum**
Establish financial stability through an improved understanding of stewardship and legacy giving.

The SPTF explained how it arrived at the goals during a congregational meeting. It also offered future listening circles to gain additional input from members for identifying actionable strategies toward the objectives. With input from members within these listening circles, the SPTF created objectives for each goal. These objectives included responsible parties, necessary resources, and methods for measuring progress.

These objectives coalesced naturally into the UUCFW Strategic Plan for 2024-2029. This is an iterative, organic document, designed not to gather dust but as a guide for planning, reporting, and allocating resources.

The Strategic Plan is most detailed for the first 2-3 years. This allows space for shifts and changes during implementation. In 2025-26, our committees and groups will look at achievements during the preceding years and determine updated measures of success for continued progress. This timeline is designed to line up with the arrival of our next settled minister.

The successful implementation of this plan requires the following:

- The BOT will review the Strategic Plan at their annual retreat to review accomplishments, as well as update and pivot objectives as needed to ensure continued momentum. This will be done with the advice and input of the people who are actively working towards these goals. The BOT will align decisions and additional activities around these updates in future meetings.
- The Committee Council will structure quarterly meetings around progress toward the goals.
- The Strategic Plan will be the basis for reports when compiling the Annual Report for the Congregation.

Nurturing Each Other

To foster a safe and inclusive space for diverse people to build a deep sense of belonging through opportunities for meaningful group engagement and shared personal experiences.

This ties in with the portion of our vision statement that states: “We nurture each other as a diverse, intergenerational, and multicultural congregation”

This goal is divided into five objectives:

1. Build consistent congregational communication and connection among leadership and congregation.
2. Build a pastoral care team to support the congregation and the Minister. We will build a stronger team to support congregation members and friends.
3. Establish a staff position for coordinating volunteer efforts to increase connection through purposeful activity. We will create strategies to hire a Volunteer Coordinator to organize ways people can give their time and talents to the congregation.
4. Intentionally form ways to connect in small groups of all ages around common and meaningful passions. People find meaning when gathering with others who share common interests and passions.
5. Increase Sunday service accessibility and content variety. We should provide as many adaptations as possible to support the engagement of all persons in service.

This work is accomplished by congregation members, Minister, BOT, Care Committee, Buildings and Grounds Committee, and our Congregational Administrator.

1. Build consistent congregational communication and connection among leadership and congregation.

Strategies toward achieving this objective include exploring ways to share our weekly Around the Meeting House announcements in wider ways, such as on TVs in the gallery and the social hall, surveying members and friends of the congregation regarding their communication preferences, tracking participation in congregational and supported community activities.

Our measure of success for this objective will include:

- Building a system for tracking and documenting activity participation in 2023-24 and obtaining feedback.
- In 2024-25, we will refine the system from feedback and determine the desired participation increase from the baseline.

2. Build a Pastoral Care Team to support the congregation and the Minister. We will build a stronger team to support congregation members and friends.

Strategies for achieving this objective will include learning about best practices for Pastoral Care, reviewing and revising Care Team structures, creating systems for reaching out to friends and members on a more consistent basis, disseminating appropriate information to the congregation, and creating a plan for following up on joys and concerns.

Our measure of success for this objective will be:

- Establishing a Transitions Team in 2023.
- Reestablishing the Committee on Ministry by 2025.
- 25% of the congregation actively participates in care team activities by 2026-27.

3. Establish a staff position for coordinating volunteer efforts to increase connection through purposeful activity. We will create strategies to hire a Volunteer Coordinator to organize ways people can give their time and talents to the congregation.

Strategies to achieve this objective will include investigating opportunities for raising funds or otherwise allocating existing funds for this staff position, developing processes and information fairs to organize folks for volunteering, highlighting how participating in congregational life is a responsibility of membership, and discussing the concept of shared ministry and its impact.

Our measure of success will be:

- 90% of members volunteer at least one time per year.
- A new staff member will be in place who is accountable for making sure volunteer roles are filled and volunteer tasks are completed by 2027-28.

4. Intentionally form ways to connect in small groups of all ages around common and meaningful passions. People find meaning when gathering with others who share common interests and passions.

Strategies to achieve this objective include additional small group ministry options, organized dinners for smaller groups, as well as the formation of affinity and interest groups.

Our measure of success for this objective is

- Having 2 (TWO) additional events per month for members and friends by 2024-25.
- The creation of 2 (TWO) interest groups by 2024-25.
- Having a program to assess with a settled minister in 2025.

5. Increase Sunday service accessibility and content variety. We should provide as many adaptations as possible to support the engagement of all persons in service.

Strategies to make our sanctuary more accessible include providing permanent space for wheelchair seating, hearing devices, and a TV for words/images and helping everyone find/use other adaptations that work for them, such as noise-canceling headphones for those easily distracted or afraid of sudden, loud noises. This objective works in tandem with the Accessibility & Adaptability Addendum.

Our measure of success is

- Having the resources to provide a wide variety of accessible adaptations for services and events to anyone who needs them by 2029.
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Honoring Spiritual Paths

To strengthen understanding of and connection to the history, principles, and covenants of Unitarian Universalism through intentional educational programming and spiritual practices.

This ties in with the portion of our vision statement that states: “We honor a variety of spiritual paths while promoting religious liberty.”

This goal contains three main objectives:

1. Create deeper internal community bonds with each other through our shared faith tradition.
2. Completing the digitization and compiling of UUCFW’s historical archive.
3. Create a deeper external connection to our greater Unitarian Universalist community.

This work will fall on lay leadership, the Board of Trustees, the Congregational Archivist, and the minister. Additionally, capital must be set aside for programming material, leadership development, and other costs.

1. Create deeper internal community bonds with each other through our shared faith tradition;

Strategies toward achieving this objective include establishing a robust and stable Adult Faith Formation program. We will maintain our Soul Matters small groups. In addition, we will offer 1 to 2 programs from the UUA’s Tapestry of Faith per year. We will also work to provide a series on comparative religions. After two church years, we will assess the program with our new, settled minister.

Our measure of success for this objective is:

- A program that offers a minimum of 5 (FIVE) small group options, with each group having more than 4 (FOUR) participants by the 2025-2026 church year.

2. Completing the digitization and compiling of UUCFW's historical archive.

This will require our Archivist and a small group of volunteers to develop a plan of action on what work needs to be done and when it can be done. They will need to establish one physical location to store our historical files, one cloud-based digital location to store files, and one place to store external storage devices as an additional backup.

Our measure of success will be

- Having our known files digitized with everything in one storage location by 2025.
- Having a formal archival policy and procedure be put into place that is in line with the systems that were developed from 2023-25.

3. Create a deeper external connection to our greater Unitarian Universalist community.

Strategies toward achieving this objective include developing a delegate pool and participating fully within our Regional and General Assemblies. This will allow us to have our delegates picked by the deadline within our policy. Additionally, it gives us time and space to interact and form relationships with other UUs. Offer time, space, and programming to nurture deeper connections with our regional community. This could take many forms and requires that we work with our minister, Faith Formation team, and regional community to fully develop the specifics of how this looks. Organize a congregational trip to Boston for adults and youths around the 2026-27 church year to physically connect with our UU heritage. We envision this as a project we will work toward with other regional congregations.

The measure of success for this objective is:

- Having completed a successful national trip with other UU communities by the end of 2027.

- Sending the maximum number of delegates we're allowed to regional and national meetings.
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Engaging Our Congregation

To offer opportunities for members and friends to explore spirituality and sources of wisdom with respect, while advocating for religious freedom within the larger community.

This ties in with the portion of our vision statement that states: “We honor a variety of spiritual paths while promoting religious liberty.”

This goal was divided into three objectives:

1. Provide opportunities for diverse and dynamic spiritual development experiences.
2. Share our commitment to religious freedom, free thought, and diverse spiritual experiences with our internal and greater communities.
3. Renew our UUA Welcoming Status.

The Worship Committee, the BOT, and various topical task forces or Groups of Five will be responsible for the bulk of this work.

1. Provide opportunities for diverse and dynamic spiritual development experiences.

The strategies for this objective will include surveying the congregation to assess spiritual identities, providing opportunities for members and friends to give input on what they would like to hear from the pulpit, and providing spiritual growth through all the arts.

The measure of success for this objective is:

- The completion of a congregational survey.
- Having the arts directly connect to ministerial themes 4 (FOUR) times a year by 2025.

2. Share our commitment to religious freedom, free thought, and diverse spiritual experiences with our internal and greater communities.

Because of the political and sometimes controversial implications of this objective, the strategies for it require that our governance documents clearly state who is empowered to speak on these topics as a representative of the congregation before moving forward. Creating a task force that can quickly take this on would be beneficial. Additional strategies include clarification on how we identify (are we a church, a congregation, a meetinghouse), working with other communities interested in liberal religion and religious liberty, collaborating with Free Thought and religious freedom groups, as well as identifying how we wish to use our voice in our greater community.

The measure of success is for this objective is:

- The creation of a board policy regarding the appropriate person(s) to speak for the congregation on matters of free thought and religious freedom by the end of 2025. Then, look to leadership for action around this issue.
- Collaborate with a new minister on advocating for religious freedom and exploring spirituality in 2026.

3. Renew our UUA Welcoming Status

The strategies for this objective are detailed by the UUA, they include surveying the congregation to determine if this is work we want to take on, forming a small committee to work on this project, and collaborating with local community groups that support LGBTQIA+ persons, as well as others. Additionally, we can identify additional marginalized communities we can attract and serve.

The measure of success for this objective will be:

- Completion of congregational education followed by a survey in 2023-24 to determine if there is enough interest to pursue the work in 2024-25.

- Will collaborate with the new minister on continuing this work in 2025-26.
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Engaging Our Community

To actively engage with and serve our local community by building relationships, identifying shared values, supporting one another in good works, and working collaboratively for justice.

This ties in with the portion of our vision statement that states: “We intentionally engage in community relationships that champion environmental and social justice.”

This goal is divided into three objectives.

1. Leverage our community engagement and impact by improving the connection between members already involved in social action (Social Justice Movers or SJMs) and the congregation.
2. Lay the foundation for sustained community action by providing leadership development for youth that is centered around their social justice areas of interest.
3. Extend our community involvement by supporting existing goal-oriented community partners who share our vision for a just future. This involvement will be intentional, consistent, and include supporting the partners by sharing financial giving, group volunteer opportunities, and sharing their information with the congregation.

The bulk of this work will be done by our advocate groups, Family Faith Formation, our Minister and Worship Teams, our Financial Committees, the BOT, and additional groups as needed.

- 1. Leverage our community engagement and impact by improving the connection between members already involved in social action (Social Justice Movers or SJMs) and the congregation.**

Our strategies for this objective will include consistently disseminating actionable information arising from this connection, keeping in mind our variations in political alignment, accessibility needs, and approaches to absorbing new material.

Our measures of success will include:

- Identifying SJMS by conducting a congregation-wide “Engaging our Community” Survey within one year.
- Developing a system for gathering and disseminating information from SJMs to the congregation using survey data within two years.

2. Lay the foundation for sustained community action by providing leadership development for youth centered around their social justice areas of interest.

Strategies to achieve this objective will include infusing RE with project-based elements that allow youth to share their social justice interests with the congregation, enrich their relationship with SJM elders, and increase their work in the community.

Our measures of success will include:

- Establishing youth leadership skills and social justice action targets within one year through collaboration with SJMs, Faith Formation Team, and Minister.
- Selecting at least three project-based elements in the youth RE program within two years.

3. Extend our community involvement by supporting existing goal-oriented community partners who share our vision for a just future.

Strategies to achieve this objective will include intentionally and consistently supporting our community partners by sharing their information, giving financially, and volunteering as a group in community-partnered events.

Our measures of success will include:

- Reevaluating the social justice impact of our third Sunday Share the Plate program with the Financial Committee, Stewardship Committee, BOT, and congregation within one year.
- Confirming a list of 3-6 community partners by using feedback and information from the Share the Plate reevaluation process within one year.



Accessibility & Adaptability Addendum

Grow our technological offerings to provide better opportunities for congregational participation for all of our members and friends.

Our limited technology before March 2020 consisted of recording our services on CDs for members who were unable to physically attend services. When the pandemic hit and forced the meetinghouse and grounds to be closed, our minister immediately transitioned to providing Zoom services using her computer. With a matching \$5,000 grant from the Center for Congregations, we purchased the basics for Zoom services from the sanctuary with limited staff present. When the stewardship committee had outdoor conversations with members in September of that year, they were thrilled with our ability to pivot to include online services and wanted them to continue. They articulated the benefit of online services for members who had not been able to come to the meetinghouse, and were now able to participate, as well as other new people who were joining us. Since that pivotal time, the Tech Team has grown to several volunteers who identified many additional needs.

This addendum specifically ties in with the portion of our vision statement which states, "We nurture each other as a diverse, intergenerational, and multicultural congregation."

This addendum has five objectives:

1. Increase accessibility for those members with hearing deficits.
2. Improve the Zoom experience by supplying more camera angles and mics for those unable to attend physically.
3. Improve in-person experience by increased accessibility to song lyrics, improved sound, and better Tech/Production tool usability and area aesthetics.
4. Provide volunteer access to services with audio and/or visual feeds in the kitchen, social hall, and nursery.

5. Provide for regular maintenance and updating of our tech equipment.

The Tech Team, Buildings and Grounds Committee, and the BOT will complete most of the work. There are specific Tech hardware recommendations for purchase and plans have been established for a rollout of purchases over time.

1. Increase accessibility for those members with hearing deficits.

Strategies to achieve this objective will include updating wifi in the building, adding mics, upgrading or replacing sanctuary speakers, and providing assistive listening devices with an app and loop for use.

Our measures of success will be:

- Having Wi-Fi available and reliable throughout the building and good volume levels throughout the sanctuary in 2024..
- Receiving positive feedback from members with hearing deficits because assistive devices are installed in 2025.

2. Improve the Zoom experience by supplying more camera angles and mics for those unable to attend physically.

Strategies to achieve this objective will include acquiring an additional Lavalier Wireless Mic, for services with multiple speakers, and as a backup; adding PTZ Cameras with eye focus mode to allow for flexibility, and improved video quality during Sunday services; and having more advanced video switcher and joystick/controller.

Our measures of success for this objective will be:

- Positive feedback from Zoom members that there are no audio or video issues.
- Videos have better consistency from camera to camera.
- Editing video is easier and faster for volunteers.
- More extended portions of the Sunday service are posted online.

3. Improve in-person experience by increased accessibility to song lyrics, improved sound, and better Tech/Production tool usability and area aesthetics.

Strategies to achieve this objective will include moving current gallery speakers into the sanctuary, exploring ways to provide various types of visual media in the sanctuary, researching options to provide a custom Tech Desk, and properly licensing music used during service.

Our measures of success for this objective will be:

- Properly paying for music licensing to share our services with music on our website, social media, and elsewhere.
- Having improved efficiency and aesthetics of tech space by 2025
- Having a plan established by 2026 to include in a list of priorities for the capital campaign.

4. Provide volunteer access to services with audio and/or visual feeds in the kitchen, social hall, and nursery.

Strategies to achieve this objective will include providing 6 (SIX) 70-volt speakers with a 70-volt amp for installation throughout the building and providing a 55-in TV for the gallery to provide additional ways to share how to connect with our community.

Our measures of success for this objective will be:

- Installation of additional speakers by 2026.
- Receiving positive feedback in a formal capacity from volunteers, staff, and members who have increased connection with Sunday services and special events.
- Increased participation in upcoming events.

5. Provide for regular maintenance and updating of our tech equipment.

Strategies to achieve this objective include establishing a timeline for maintenance, updating, and replacing tech equipment.

Our measure of success for this objective will be:

- Having a clear timeline for this task by 2025.
 - Equipment is replaced/maintained before failure or obsolescence.
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Giving & Generosity Addendum:

Establish financial stability through an improved understanding of stewardship and legacy giving.

The financial stability of the congregation impacts all areas of ministry and service. This area is a necessary addendum to the original 4 goal areas established from the visioning workshops.

This addendum ties into every part of our vision.

This addendum has five objectives:

1. Attract the best minister we can.
2. Continue our commitment to be an Honor Congregation with the UUA.
3. Establish a budget line item to coordinate congregational development for religious education and projects that live into our values and mission.
4. Support the Planned Giving Program (Old Mill Legacy Society) for the long-term financial stability of the congregation.
5. Prepare for a capital campaign to live into our mission and vision.

The majority of the work will be done by the Finance, Endowment, and Stewardship Committees in conjunction with the BOT and other task forces as needed. They will require input from specific areas of leadership and the congregation, as changes in culture require input from everyone.

1. Attract the best Minister we can

We need organized and complete membership and pledge information to attract a great minister. We have been working to establish "Planning Center" as a management system. It will manage the office information and eventually allow the members to check in and sign up for upcoming events, schedule meeting space, and update their membership data. This will also make our administrator's job easier and more efficient.

Our ability to attract the best minister will require additional monies to pay for the search committee's needs and provide an adequate compensation package for our current interim minister and next minister. This additional money needs to come as an increase in our budget for 2024 and beyond.

Possible ways to obtain the additional monies include increasing fundraising and rental income by 15%, increasing pledge income by 10%, and monitoring and decreasing recurring expenses by 5%. There were several suggestions for ways to manage the above with possible task forces to ID groups for long-term rentals and come up with creative fundraisers as well as items that members can purchase for the meeting house needs.

Our measure of success will be:

- Purchase and train church leadership in the use of the "Planning Center" within one year.
- Increase budget to \$280K for 2024 and increase as needed to maintain and expand our programming.

2. Continue our commitment to be an Honor Congregation with the UUA

We, as a congregation, have made a specific effort in recent years to honor our commitments to the UUA. This Honor Congregation designation allows us to have access to professionals in the regional and national offices for our leadership training needs, assistance for our search team, as well as insurance and retirement programs for our employees. There is also a Chalice Lighter program to which several of our members already donate. If we reach a 10% threshold of donors, we would be eligible to apply for a \$10,000 grant for specific needs of our church.

Our measure of success will be:

- Maintaining Honor Congregation status.
- Increasing our Chalice Lighter participation to 12 members to qualify for a possible Chalice Lighter grant.

3. Establish a budget line item to coordinate congregational development for religious education and projects that live into our values and mission.

We had many conversations about this revised goal. Many of our members have been asking for more project-based activities where we live our values in the community, especially when targeted responses are required to immediate social justice issues. When children, youth, and adults work together on projects it shows us how to live into our mission and vision. Doing becomes learning. This will require a deeper conversation about "Sunday School and our Sunday Plate" and how to best utilize our monetary and human capital for the education of our UU values.

Our measure of success will be:

- Complete member conversations about our Sunday Plate Program.
- Determine what programs and funding are needed for projects and materials to teach/live out our values and mission by the end of 2024.

4. Support the Planned Giving Program (Old Mill Legacy Society) for the long-term financial stability of the congregation

When we discussed this issue, members stated that they believe several members have already included UUCFW in their estate planning. However, UUCFW has yet to hear about it. A dedicated program for this allows for discussions to occur in advance so that when the time comes, the minister can have informed conversations with the family. It is also a way to encourage people to think about their funeral plans ahead of time and fill out the paperwork related to that as well.

Our measure of success will be:

- Increase the number of members who include UUCFW in their estate planning by 10% by 2025 from the baseline.

5. Prepare for a capital campaign to live into our mission and vision.

We have been doing the work Mark Ewert recommended to be ready to take on a capital campaign. Our interim minister is here for these two years to help us prepare for calling a new settled minister. We agreed that establishing the task force(s) to determine what items to be included and what monetary level, for which we have the capacity, will need to be addressed in 2026.

Our measure of success will be:

- To establish the task forces necessary by 2026.
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Plan Implementation

This strategic plan aims to be an iterative, organic document, destined not to gather dust on our shelves but to be readily at hand and referenced by the Board of Trustees and staff in our meetings and during activities. It is to be considered a co-created, evolving document that guides us in setting annual goals, advising committee work, considering our space and asset needs, preparing budgets, and reporting accomplishments at our annual congregational meeting.

Specific ways the plan will be used include

The Board of Trustees will reference the plan to review, assess, and pivot directions/strategies annually during the first quarter of the year.

Decisions at subsequent meetings will be aligned with the goals outlined in the plan.

The plan will be referenced when making decisions about budgeting and allocation of resources.

Committees will plan their activities around accomplishing the goals of the strategic plan.

The goals and outcomes outlined in the plan will be the basis for reports compiled for the Annual End-of-Year Report to the Congregation.

Annual Review of Outcomes

Preparing for the Annual End-of-Year Report to the Congregation is a good time to reflect upon this work. End-of-year reviews are not meant to be about failures or successes in achieving objectives but opportunities to think about how to move forward. It is suggested that leaders and staff consider these questions.

- What did we learn about doing our work this year?
- Which objectives were we able to fully accomplish? Was there progress toward or partial success in others?
- Did changing circumstances alter some of our plans?
- Were there activities or outcomes we had to abandon? Why?

- For the coming year, how do we best use our time, energy, and resources to accomplish our goals? Do we continue the current activities and/or pivot in new directions?