

Orange Coast Unitarian Universalist Church

Five Year Strategic Plan

January 2006

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INTRODUCTION TO THE STRATEGIC PLAN

OVERVIEW OF THE CONGREGATION

DESCRIPTION OF THE CONGREGATION

OCUUC is a healthy church with a congregation dedicated to support the church and the larger community. The congregation has refurbished the church, so it is a place well cared for with beautiful gardens and conducive to worship. We appreciate our outstanding and productive staff

We have enjoyed eight years of a successful ministry with our minister, Karen Stoyanoff. We have grown spiritually and have a deeper appreciation for the community of our congregation. We have initiated many successful programs that lend themselves to a better sense of community within the church.

The congregation always realizes that we can do better and strives to do just that. We realize that we are limited in achieving our dreams because of our size. Currently, our congregation is a mid-sized congregation of slightly more than 250 members. We would like to become a large mid-sized church with between 400 to 500 members. We believe we can achieve that growth through enhanced programming, clarifying leadership roles, being more transparent in the areas of leadership and finances, and streamlining our committee structure.

STATEMENT OF PURPOSE

Seeking truth,
Building just communities,
Caring for one another.

CONGREGATIONAL AFFIRMATION

Love is the spirit of this church and service is its law. To dwell together in peace, to seek truth in love, to help one another; this we affirm together.

MISSION STATEMENT (Adopted c. 1994)

The purpose of the Orange Coast Unitarian Universalist Church is to create and nurture a place in Orange County that welcomes all persons into a diverse, empowering and caring spiritual community that exemplifies and promotes our Unitarian Universalist values. We do this by

- Offering programs for worship, religious education and fellowship for all ages.
- Providing opportunities to help create a more just community.
- Generating opportunities for spiritual, intellectual and leadership growth.
- Supporting and participating in the wider Unitarian Universalist Community

CONGREGATIONAL INPUT

SURVEYS AND WORKSHOPS CONDUCTED SINCE 1997

November 1997: Ministerial Search Committee Survey

Themes created by the free response question “*What are the main things that you would like to see the congregation accomplish or get involved within the next three to five years*” indicated that the congregation was very interested in doing social justice work, reaching out to the local community, and stabilizing and healing the congregation.

**54 people responded when asked if they wanted the church to grow:
31 responded yes, 19 were indifferent, 4 responded no.**

October 1999: Long Range Planning Workshop

The congregation participated in focus groups and five main themes to work on evolved: excellence in “doing church”, enhanced programming, making a difference in people’s lives, a caring community, and spirituality, which was not defined.

April 21, 2002: Howell Lind Workshop

This workshop culminated in a Sunday worship service in which members of the congregation were asked where they wanted the church to be in seven years. The material gathered from this event reflected a desire to do more and do it better in the areas of religious life, church community, religious education, social justice/community outreach, church activities, and music.

January 21 - 27, 2005: Long Range Planning Committee’s Vision Week Workshops

Fifteen workshops were held during this week and 116 members, friends, and youth participated in those workshops. Each workshop was led by a trained facilitator and included a recorder. All recorded comments were grouped into themes and the comments and themes were presented to the congregation on the member area of the church website and a hard copy was kept in the office. Presentations were made by the Long Range Planning Committee to the Board and several other committees: Membership, Community Service, Children’s Religious Education, and Music. The presentations highlighted those recorded themes and comments that related to each group’s specific area(s) regarding their work in the church.

The data generated from these workshops form the basis upon which this Strategic Plan has been created. The data generated from the January workshops are not in conflict with historical surveys conducted in the past. The nine Strategic Areas and Strategic Goals of this plan have come directly from recorded comments made during the Vision Week workshops

OVERVIEW OF THIS PLAN

OBJECTIVE

The objective of this Five Year Strategic Plan is to put forth a strategy and a set of objectives and tasks that will enable the congregation to realize its vision for the future of the Orange Coast Unitarian Universalist Church by changing from a problem solving orientation to a vision focused orientation.

STRATEGY

The overall strategy embodied in the plan is essentially one of cyclical growth. Enhanced programming will drive membership growth. Membership growth will result in an increased cadre of volunteers and pledge units which will fund facility and staff growth. These increased resources will lead to further expansion of programs which will lead again to more membership growth. We are convinced that many more people would find our spiritual community both useful and comfortable if they knew about it and if we had an enriched program to engage them when they find us.

This plan is not intended to be a comprehensive step-by-step plan of activities to be undertaken in the next five years with resources and costs attached to each activity. Rather this strategic plan outlines a series of objectives and tasks in nine strategic areas to be used as a planning guideline for the Board and the committees responsible for those strategic areas. Implementation of the plan should be monitored by the Long Range Planning Committee and an annual evaluation of the progress of the plan should be included in the Annual Report to the Congregation by the chair of that committee.

The plan is an opportunity for the congregation, the Board, and the staff to realize their priorities for the coming five years. As conditions change, so do desires and priorities. Thus, this plan should be re-evaluated and updated on a continual basis. The Long Range Planning Committee strongly recommends that the Visioning Week workshops be repeated in 2010 and that a new Strategic Plan be submitted to the congregation for ratification in January of 2011.

HIGHLIGHTS OF THIS STRATEGIC PLAN

- X Desire to participate in a more focused program of service and outreach that will increase the visibility of OCUUC and engender more respect in Orange County for our liberal values and religious principles.
- X Need religious programming for children, youth and adults that more fully meet the spiritual and intellectual needs of our congregation
- X Desire to worship in alternative ways that include children and youth and will attract young adults to our Unitarian Universalist faith.
- X Need to streamline our workforce of volunteers and staff so the work of the church is done more effectively.

- X Need to market ourselves better through advertising and community outreach.
- X Continue to be more welcoming to visitors and to repel fewer of them.
- X Integrate new members more intentionally into our community.
- X Clarify our decision-making structure so that it is vision-focused, responsive, accountable, and transparent.
- X Create a culture of generous giving, careful spending, and improve communication with the congregation about the financial workings of the church.

BOARD ROLES AND RESPONSIBILITIES

- X Review this plan and approve it for presentation to the congregation.
- X Set a special congregational meeting to approve the plan.
- X Assign responsibilities for objectives and tasks and monitor progress rewriting goals, objectives, and tasks as necessary.
- X Use the strategic plan as a guideline for annual planning.

LONG RANGE PLANNING TIMELINE

- X **Oct. 2004:** UUA Consultant Jeri Moulder conducts a two day weekend workshop with 20 leadership people on Saturday and on Sunday a workshop with the congregation.
- X **Jan. 2005:** Vision Workshops are held during Vision Week for members, friends and youth. Comments are recorded and writing of the Strategic Plan is begun.
- X **Apr. 2005:** Recorded comments are presented to and discussed with the Board and appropriate committees.
- X **Aug. 2005:** Chair of the LRP Committee meets with the VP Program of the Board to discuss the role of the Program Council in relationship to this Strategic Plan.
- X **Sept. 2005:** LRP Committee members begin to take Strategic Areas to committees and groups that will be working in those areas for their review and approval. Board uses the Strategic Areas in their planning at their retreat.
- X **Nov. 2005:** Material gathered from committees and groups in Sept. is collected and written into the Strategic Plan.
- X **Jan. 2006:** Draft of the Strategic Plan is presented to the Board for review.
- X **March 2006:** Strategic Plan approved by the Board.
- X **April 2006:**
 - o Strategic Plan posted on the Members Only area on the church website.
 - o Office copy given to Administrator.
 - o Reach Article written by LRP about the Strategic Plan.
- X **May 2006:** Hearings on the Strategic Plan are held by the LRP for members of the church. All leadership is encouraged to attend.
- X **June 2006:** Plan is presented to the congregation at the Annual

Congregational Meeting for ratification.

RESULTS IN 2011 FROM CYCLICAL PLANNING.

OCUUC OFFERS **ENRICHED PROGRAMMING**, WHICH ESTABLISHES CONTINUING AND SIGNIFICANT **GROWTH IN MEMBERSHIP**, WHICH EXPANDS AND BUILDS OUR **RESOURCES** INCLUDING VOLUNTEERS, STAFFING, FINANCES AND FACILITIES, WHICH FURTHER ENRICH PROGRAMMING.

THE CYCLE CONTINUOUSLY EXPANDS AND REPEATS.

PROGRAMMING OFFERED

1. Vibrant youth and young adult programs
 - a. More folks 25 to 40 years of age
 - b. An active singles group
 - c. A separate youth ministry
 - d. 150 children and 50 youth enrolled in Children's Religious Education
 - e. More experiential curriculum i.e. field trips

2. More visible community service opportunities
 - a. More focused and more visible social action projects for member involvement
 - b. Sunday offering and/or 10-20% of our budget to designated projects.
 - c. A recognized and significant liberal presence in Orange County
 - d. "Walking our talk" in terms of environment and other critical issues.
 - e. Our children and youth will be given many opportunities to learn to "walk the talk".

3. Worship services more engaging to the congregation and to visitors
 - a. Children and youth will be more present.
 - b. More participatory and experimental
 - c. Upbeat, contemporary music using a variety of instruments.

CONTINUING AND SIGNIFICANT GROWTH IN MEMBERSHIP

1. Growth in numbers
 - a. 400 (for most) – 1600 (for a few)
 - b. We may have merged with another UU church in Orange County or may be considering merger.

2. Community
 - a. We will preserve and ensure a sense of being a "caring community".
 - b. We will attract families of more than 2 generations and we will keep

- these families in our community.
- c. Our congregation will be vibrant, exciting and youthful.
- d. Expanded support groups for the community

EXPANDING AND BUILDING OUR RESOURCES THROUGH MEMBERSHIP GROWTH

1. Larger and more flexible facilities
 - a. Our sanctuary seats 350
 - b. More flexible spaces for community and youth programs
 - c. More parking
 - d. More office and meeting spaces

2. Increased and varied staffing
 - a. Full-time DRE
 - b. Associate Minister
 - c. More office staff
 - d. More staff keeping our facilities in good condition that better reflects our UU values.
 - e. More staff to work with youth and young adults

3. Finances
 - a. We have created a culture of generous giving
 - b. We have created a culture of responsible spending.
 - c. Our pledge base has grown and many members tithe.

VISION OF THE ORANGE COAST UNITARIAN UNIVERSALIST CHURCH

A vibrant religious community of about 400 to 500 members and families creating a highly visible and respected church through outreach and service to others.

A statement synthesized from the recorded comments from the Vision Workshops January 2005.

FAITH IN ACTION

Goal: Develop a focused program of service and outreach that makes OCUUC visible and respected in Orange County for liberal values and religious principles.

OBJECTIVE FA-1: *OCUUC Board establishes a Community Service Council*

Task FA-1-1: Create and update a 5-year rolling plan approved by the congregation.

Task FA-1-2: Continue current successful social action projects.

Task FA-1-3: Partner with outside churches and other organizations whenever appropriate to further the OCUUC vision.

OBJECTIVE FA-2: *Provide financial support to non-profit, interfaith, and politically nonpartisan organizations that have broad congregational support.*

Task FA-2-1: Institute an annual process to raise funds.

Task FA-2-2: Institute a process for discerning congregational priorities for distributing funds.

Task FA-2-3: Develop guidelines for the distribution of funds on a short-term or one-time basis.

OBJECTIVE FA-3: *Involve more of the congregation in Community Service Programs.*

Task FA-3-1: Take more visible stands on issues with broad congregational support in order bring them to the attention of the larger community.

Task FA-3-2: Publicize on-going and new service programs through the newsletter, press releases, website, and bulletin boards.

Task FA-3-3: Organize forums and workshops to train congregation members, friends and youth.

Task FA-3-4: Partner with other UU and local churches to develop fund-raising and service projects.

Task FA-3-5: Build and maintain a spirit of co-operation among social action and community outreach groups by creating and promoting clear guidelines and policies.

Faith In Action Timeline

| Task | Due Date | Accountable |
|---|-----------------|----------------------------|
| FA-1-1: Create and update a 5-year rolling plan approved by the congregation. | 6/07 | FA Council/Board |
| FA-1-2: Continue current successful social action projects. | On-going | FA Council |
| FA-1-3: Partner with outside churches and other organizations whenever appropriate to further the OCUUC vision. | On-going | FA Council |
| FA-2-1: Institute an annual process to raise funds. | COMPLETE | FAC/ Finance Councils |
| FA-2-2: Institute a process for discerning congregational priorities for distributing funds. | COMPLETE | FA Council |
| FA-2-3: Develop guidelines for the distribution of funds on a short-term or one-time basis. | On-going | FA Council |
| FA-3-1: Take more visible stands on issues with broad congregational support in order to bring those issues to the attention of the larger community. | On-going | FA Council |
| FA-3-2: Publicize on-going and new service programs through the newsletter, website, and bulletin boards. | On-going | FAC/Communi-cations Comte. |
| FA-3-3: Organize forums and workshops to train congregation members, friends, and youth. | 6/07 | FA Council |
| FA-3-4: Partner with other UU and local churches to develop fund-raising and service projects. | On-going | FAC/Finance Councils |
| FA-3-5: Build and maintain a spirit of cooperation among social action and community outreach groups by creating and promoting clear guidelines and policies. | On-going | FA Council |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

RELIGIOUS EDUCATION

Goal: Provide programs that meet the ongoing spiritual and intellectual needs of children, young adults, and adults.

OBJECTIVE R-1: *Build, strengthen, and support programs so children and youth are more visible in and integrated into the congregation.*

Task R-1-1: Increase the number of intergenerational services and activities to at least one event every other month.

X Obtain feedback from the congregation on intergenerational services.

Task R-1-2: Articulate clearly what we want our children and youth to know.

Task R-1-3: Ensure that children and youth are responsible for visible roles in Sunday Worship Services.

OBJECTIVE R-2: *Create youth and young adult ministries so that OCUUC attracts and retains committed families of several generations.*

Task R-2-1: Form a task force to hire a Youth Advisor.

Task R-2-2: Hire a Youth Advisor.

Task R-2-3: Implement Bridging Program.

OBJECTIVE R-3: *Provide consistently high-quality programs that offer intellectual and spiritual stimulation.*

Task R-3-1: Create an Adult R.E. Committee with a chair and a focus.

X Assess needs, focus and create a timeline.

Task R-3-2: Coordinate with Young Adult Committee, Young Religious UU's.

Task R-3-3: Offer Build Your Own Theology on an ongoing basis.

OBJECTIVE R-4: *Increase awareness of our religious education program internally and externally in order to attract participants and members.*

Task R-4-1: Work with the Minister and Worship Associates in creating a new service format which will appeal to families, children, and youth.

Task R-4-2: Develop a program of Social Action Sundays.

Religious Education Timeline

| Task | Due Date | Accountable |
|--|-----------------|--------------------|
| R-1-1: Increase the number of intergenerational services and activities to at least one every other month. | 12/06 | Minister/DRE |
| R-1-2: Articulate clearly what we want our children and youth to know. | 6/07 | CREC |
| R-1-3: Ensure that children and youth are responsible for visible rolls at Sunday Worship Service. | 9/06 | Minister/DRE |
| R-2-1: Form a task force to hire a Youth Advisor. | COMPLETE | Board |
| R-2-2: Hire a Youth Advisor. | 2/06 | Board |
| R-2-3: Implement Bridging Program. | 6/06 | Youth Advisor |
| R-3-1: Create an Adult R.E. Committee with a chair and a focus. | COMPLETE | Board |
| R-3-2: Coordinate with Young Adult Committee, Young Religious UU's. | On-going | Minister/DRE |
| R-3-3: Offer Build Your Own Theology. | Annually | Minister |
| R-4-1: Work with the Minister and Worship Associates in creating a new service format which will appeal to families, children and youth. | 9/06 | DRE/CREC |
| R-4-2: Develop a program of Social Action Sundays | 6/06 | DRE/CREC |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

WORSHIP

Goal: Ensure consistent quality worship experiences that are professional, engaging, and appropriate to our UU values.

OBJECTIVE W-1: *Present a broad range of worship opportunities to meet the religious, ritual and spiritual needs of a diverse congregation.*

Task W-1-1: Ensure that messages from the pulpit are delivered by a minister or under the auspices of the Worship Associates and are religious and/or spiritual in nature.

Task W-1-2: Draft policies concerning pulpit guests and their responsibilities.

Task W-1-3: Establish a task force under the auspices of Worship Associates to investigate congregational interest in forms of alternative worship.

X Present a preliminary report to the Board.

Task W-1-4: Finance Council conducts an impact study of presenting alternative services.

OBJECTIVE W-2: *Continue to offer worship alternatives that are more contemporary and upbeat.*

Task W-2-1: Develop a plan to purchase new hymnals.

Task W-2-2: Children and youth participate in the worship service.

Task W-2-3: Work with the DRE and CREC in creating a new service format which will appeal to families, children, and youth.

Worship Timeline

| Task | Due Date | Accountable |
|---|-----------------|----------------------------|
| W-1-1: Ensure that messages from the pulpit are delivered by a minister or under the auspices of the Worship Associates and are religious and/or spiritual in nature. | On-going | Minister Worship Assoc. |
| W-1-2: Draft policies concerning pulpit guests and their responsibilities. | 6/06 | Minister Worship Assoc. |
| W-1-3: Establish a task force under the auspices of Worship Associates to investigate congregational interest in forms of alternative worship. | 12/06 | Minister Worship Assoc. |
| W-1-4: Finance Council conducts an impact study of presenting alternative services. | 12/06 | Finance Council |
| W-2-1: Develop a plan to purchase new hymnals. | COMPLETE | Worship Assoc. |
| W-2-2: Children and youth participate in the worship service. | 12/06 | Minister Worship Assoc. |
| W-2-3: Work with the DRE and CREC in creating a new service format which will appeal to families, children, and youth | 9/06 | Minister Worship Assoc. |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

CONGREGATIONAL DEVELOPMENT

Goal: Build committed core membership and provide systematic outreach to potential OCUUC members and visitors.

OBJECTIVE CD-1: *Clarify, promote and publicize our message.*

Task CD-1-1: Review congregational approval of the Statement of Purpose.

Task CD-1-2: Evaluate the Mission Statement in light of comments from the Vision Workshops.

OBJECTIVE CD-2: *Increase diversity to better reflect ethnic and lifestyle composition of larger community.*

Task CD-2-1: Research demographic composition of the county.

Task CD-2-2: Continue UUA Journey Toward Wholeness Anti-racism Process.

Task CD-2-3: Continue UUA Welcoming Congregation Program.

Task CD-2-4: Develop activities/events that are intentionally intergenerational.

OBJECTIVE CD-3: *Build a core of young adults and families through Religious Education and Adult Ministries.*

Task CD-3-1: Develop programs that attract young adults and families.

Task CD-3-2: Develop plans to retain young adults and families.

X Improve interpersonal channels of communication and connections.

OBJECTIVE CD-4: *Increase awareness among the general population to attract participants and members.*

Task CD-4-1: Develop Outreach/Marketing Plan.

X Present workshop on Advertising and Marketing Campaign.

X Create a plan and present it to the Board for approval.

X Advertising and Marketing Plan launched in Orange County/South Bay.

OBJECTIVE CD-5: *Establish a New Member Mentoring Program to help integrate new members into the fabric of the community.*

Task CD-5-1: Board selects a chair for the Mentoring Task Force.

Task CD-5-2: Membership and PR committees define objectives for the Task Force.

Task CD-5-3: Chair selects members to the Task Force.

Task CD-5-4: Mentoring plan developed and submitted to Membership Committee for input.

Task CD-5-5: Board approves the mentoring plan.

Task CD-5-6: Mentoring plan Phase I launched.

- X Phase II will include merging the Mentoring Task Force with the Membership Committee.

OBJECTIVE CD-6: *Promote a variety of activities that will build bonds between ages, and provide opportunities for fun and sharing.*

Task CD-6-1: Establish a committee to coordinate social activities.

Task CD-6-2: Research feasibility for providing transportation for appropriate members to appropriate church activities.

Congregational Development Timeline

| Task | Due Date | Accountable |
|---|-----------------|---------------------------|
| CD-1-1: Review congregational approval of the Statement of Purpose. | 6/06 | Board |
| CD-1-2: Evaluate the Mission Statement in light of comments from the '05 Vision Workshops. | 6/06 | Board |
| CD-2-1: Research demographic composition of the county. | 6/06 | Board |
| CD-2-2: Continue UUA Journey Toward Wholeness Anti-racism Process. | On-going | Faith In Action Council. |
| CD-2-3: Continue UUA Welcoming Congregation Program. | On-going | FA Council |
| CD-2-4 Develop activities/events that are intentionally intergenerational. | 6/06 | CREC with Gatherings |
| CD-3-1: Develop programs that attract young adults and families. | On-going | RE/Young Adult Ministries |
| CD-3-2: Develop plans to retain young adults and families. | On-going | RE/YAM |
| CD-4-1: Develop Outreach/Marketing Plan. | 6/06 | Publicity |
| CD-5-1: Select a chair for the Mentoring Task Force. | COMPLETE | Board |
| CD-5-2: Membership and PR committees define objectives for the Task Force. | 7/06 | Membership/ Publicity |
| CD-5-3: Chair selects members to the Task Force. | COMPLETE | Board |
| CD-5-4: Mentoring plan developed and submitted to Membership Committee for input. | COMPLETE | Board |
| CD-5-5: Board approves the mentoring plan. | COMPLETE | Board |
| CD-5-6: Mentoring plan Phase I launched. | COMPLETE | Mentoring TF |
| CD-6-1: Establish a committee to coordinate social activities. | COMPLETE | Board |
| CD-6-2: Research feasibility for providing transportation for appropriate members to appropriate church activities. | 12/06 | Pastoral Care |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

COMMUNICATIONS

Goal: Improve communication patterns and policies, internal and external, so they are direct, timely, and as clear as possible.

OBJECTIVE Com-1: To make effective use of technology to increase volunteer and staff efficiency.

Task Com-1-1: Use the newsletter and website to highlight events.

Task Com-1-2: Document a policy and procedures for congregation-wide e-mail messages regarding events and news items.

OBJECTIVE Com-2: Explore current methods and creative ways of effectively reaching others.

Task Com-2-1: Use and build on the UUA ad campaign; join with other OC churches to attract new members and visitors.

Task Com-2-2: Insure that website is updated weekly and the REACH is posted regularly.

Task Com-2-3: Annually review the adequacy of publicity funding.

Task Com-2-4: Consider a name for the church that reflects our values and mission.

OBJECTIVE Com-3: Review, update, expand, and codify Board policies and procedures regarding communications i.e. bulletin boards, newsletter, announcements at worship.

Task Com-3-1: Create a plan of succession for the Reach Editor and the webmaster.

Task Com-3-2: Distribute these policies to church leadership and post on Members Area of the website.

Communications Timeline

| Task | Due Date | Accountable |
|---|-----------------|--------------------|
| Com-1-1: Use the newsletter and website to highlight events. | On-going | Publicity |
| Com-1-2: Document a policy and procedures for congregation-wide e-mail messages. | 6/06 | Publicity |
| Com-2-1: Use and build on the UUA ad campaign; join with other OC churches to attract new members and visitors. | 12/06 | Publicity/UUA |
| Com-2-2: Insure that the website is updated weekly and the REACH is posted regularly. | On-going | Publicity |
| Com-2-3: Annually review the adequacy of publicity funding. | On-going | Finance Cncl. |
| Com-2-4: Consider a name for the church that reflects our values and mission. | 6/07 | Board/Cong. |
| Com-3-1: Create a plan of succession for the Reach Editor and the webmaster. | 9/06 | Board |
| Com-3-2: Distribute these policies to church leadership and post on Members Area of the website. | 9/06 | Board |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

WORKFORCE

Goal: OCUUC will continue to be a proud employer with an enviable workplace by managing staff and volunteer workloads so they are equitable, efficient, and allow the work and mission of the church to expand and strengthen.

OBJECTIVE Wk-1: *Create a system for congregational volunteer management and training.*

Task Wk-1-1: Create a task force to assess needs and establish guidelines for congregational volunteer management.

Task Wk-1-2: Assign responsibility for congregational volunteer management regarding

- X tracking volunteer engagement
- X matching interests and skills to requirements
- X job descriptions
- X rotating assignments
- X promoting and monitoring satisfaction with volunteer experience
- X developing leaders

Task Wk-1-3: Develop volunteer management system.

- X Define database and functionality.
- X Set standards and policies on team leadership, committee membership terms, and related topics.

Task Wk-1-4: Annually assess program and committee health for

- X Committee membership/leadership/terms/roles
- X Goals and progress
- X Extent work is in keeping with mission and UU values
- X Volunteer effectiveness/satisfaction

OBJECTIVE Wk-2: *Clarify and communicate administrative and committee operational processes.*

Task Wk-2-1: Make all existing church and Board policies easily available to all.

Task Wk-2-2: Make all operating and administrative procedures easily available to all.

OBJECTIVE Wk-3: *Ensure recruitment and retention of skilled staff to support administrative and ministerial needs.*

Task Wk-3-1: Provide recognition and competitive salaries for skilled staff in accordance with UUA Guidelines.

Task Wk-3-2: Assess the need for additional staff.

Workforce Timeline

| Task | Due Date | Accountable |
|---|------------------|--------------------|
| Wk-1-1: Create a task force to assess needs and establish guidelines for congregational volunteer management. | 6/06 | Board |
| Wk-1-2: Assign responsibility for volunteer management. | 6/06 | Board |
| Wk-1-3: Develop volunteer management system. | 6/06 | Board |
| Wk-1-4: Annually assess program and committee health. | Annually in June | Board |
| Wk-2-1: Make all existing church and Board policies easily available to all. | On-going | Board |
| Wk-2-2: Make all operating and administrative procedures easily available to all. | On-going | Board |
| Wk-3-1: Provide recognition and competitive salaries for skilled staff in accordance with UUA guidelines. | On-going | Board |
| Wk-3-2: Assess the need for additional staff. | On-going | Board |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

FACILITIES

Goal: Maintain buildings, grounds, and interior spaces so they reflect our values and accommodate our needs.

OBJECTIVE F-1: Improve maintenance so that our campus is clean, well-cared for, and welcoming.

Task F-1-1: Assess, identify and prioritize needs and recommend a process to complete those tasks.

Task F-1-2: Create committed teams to insure that the necessary work is accomplished.

Task F-1-3: Continue to upgrade and fine tune audio-visual systems with communication with staff and other appropriate people.

Task F-1-4: Create a maintenance plan, log, and budget to systematize and project needs for all three buildings, the grounds, and supportive systems.

OBJECTIVE F-2: Create a plan to accommodate a larger membership.

Task F-2-1: Work with a new committee or Long Range Planning to document capabilities and needs of the congregation and staff.

Task F-2-2: Recommend options to maximize present site.

Task F-2-3: Develop and maintain clear communication channels with congregation in order to build and sustain consensus.

Facilities Timeline

| Task | Due Date | Accountable |
|---|-----------------|-----------------------|
| F-1-1: Assess, identify and prioritize needs and recommend a process to complete those tasks. | 6/06 | Buildings and Grounds |
| F-1-2: Create committed teams to insure that the necessary work is accomplished. | 6/06 | Buildings and Grounds |
| F-1-3: Continue to upgrade and fine tune audio-visual system with communication with staff and other appropriate people. | 6/06 | Buildings and Grounds |
| F-1-4: Create a maintenance plan, log, and budget to systematize and project needs for all three buildings, the grounds and supportive systems. | 12/06 | Buildings and Grounds |
| F-2-1: Work with a new committee or Long Range Planning to document capabilities and needs of the congregation and staff. | On-going | Buildings and Grounds |
| F-2-2: Recommend options to the Board to maximize present site. | 6/06 | Buildings and Grounds |
| F-2-3: Develop and maintain clear communication channels with congregation in order to build and sustain consensus. | On-going | Buildings and Grounds |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

GOVERNANCE AND LEADERSHIP

Goal: Clarify the OCUUC decision-making structure to make it vision-focused, responsive, accountable, and transparent.

OBJECTIVE G-1: Streamline organizational structure

Task G-1-1: Strengthen and clarify leadership expectations.

Task G-1-2: Simplify program and governance structures.

Task G-1-3: Create a Standard Operating Procedures Manual.

Task G-1-4: Evaluate Program Council structure.

OBJECTIVE G-2: Develop and train members to take leadership roles.

Task G-2-1: Define what task forces are needed.

Task G-2-2: Staff the task forces and create objectives for them.

Task G-2-3: Document all committee job descriptions and mission statements.

Task G-2-4: Include youth and/or young adult representative(s) on the Board.

OBJECTIVE G-3: *Create a Judicial/Mediation Council*

- X Serves as a third party in disputes and interpretation of policy/procedure.
- X Serves as check and balance to Board (legislative) and Minister (executive) branches.
- X Possibly will include past presidents

Governance and Leadership Timeline

| Task | Due Date | Accountable |
|--|-----------------|-------------------------------|
| G-1-1: Strengthen and clarify leadership expectations. | On-going | Nominating Com. / Board |
| G-1-2: Simplify program and governance structures. | On-going | Board |
| G-1-3: Create a Standard Operating Procedures Manual. | 6/07 | Board |
| G-1-4: Evaluate Program Council structure. | 12/06 | VP Program |
| G-2-1: Define what task forces are needed. | 4/06 | Board |
| G-2-2: Staff the task forces and create objectives for them. | 6/06 | Board |
| G-2-3: Document all committee job descriptions and mission statements. | 6/06 | VP Program Volunteer Coord |
| G-2-4: Include youth and or young adult representative(s) on the Board | 6/07 | Nominating Com. / Board |
| G-3-1: Create a Judicial/Mediation Council. | 6/07 | Board |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

RESPONSIBLE STEWARDSHIP

Goal: Maintain a stable financial base that enables us to support programs, maintain facilities, fairly compensate staff, and continue to meet all financial commitments.

OBJECTIVE \$-1: Create and update a rolling 5-year financial projection, updated every year, accounting for new programs, new staff and facilities, debt reduction, and cash reserves.

Task \$-1-1: Integrate the Strategic Plan into the Annual Budget.

Task \$-1-2: Integrate the Strategic Plan into a 5-year budget projection that will allow for step-by-step implementation of the Plan, while being prepared for site specific future needs.

OBJECTIVE \$-2: Improve communication to the congregation about financial workings of the church.

Task \$-2-1: Quarterly summary financial reports included in the Reach or on the Members Area of the website.

Task \$-2-2: Monthly articles on designated aspects of the finance program mailed with pledge statements or posted on the Members Area of the website.

OBJECTIVE \$-3: Develop strategies for better-informed and more effective canvassing.

Task \$-3-1: Pre-canvas advertising to members via monthly statements, Reach, and Members Area of the website.

Task \$-3-2: Pre-canvas budget statement created in line with Strategic Plan.

Task \$-3-3: Review and evaluate accomplishments of past church year in order to realize needs in the coming budget year to satisfy the Strategic Plan.

OBJECTIVE \$-4: Create a culture of generous giving and of careful spending.

Task \$-4-1: Visual aids presented on bulletin board and in the Reach reflecting how

collections are being met, i.e. "Pledge Thermometer".

Responsible Stewardship Timeline

| Task | Due Date | Accountable |
|---|-----------------|--------------------|
| \$-1-1: Integrate the Strategic Plan into the Annual Budget | 6/06 | Finance Coun. |
| \$1-2: Integrate the Strategic Plan into a 5-year budget projection that will allow for step-by-step implementation of the Plan, while being prepared for site specific future needs. | 9/06 | Finance Coun. |
| \$-2-1: Quarterly summary financial reports included in the Reach or on the Member Area of the website. | 4/06 | Finance Coun. |
| \$-2-2: Monthly articles on designated aspects of finance program mailed with pledge statements or posted on the Members Area of the website. | 3/06 | Finance Coun. |
| \$-3-1: Pre-canvas advertising to members via monthly statements, Reach, and Members Area of the website. | COMPLETE | Finance Coun |
| \$-3-2: Pre-canvas budget statement created in line with Strategic Plan. | 3/06 | Finance Coun |
| \$-3-3: Review and evaluate accomplishments of past church year in order to realize needs in the coming budget year to satisfy the Strategic Plan. | 3/06 | Finance Coun |
| \$-4-1: Visual aids presented on bulletin board and in the Reach reflecting how collections are being met, i.e. "Pledge Thermometer". | 8/06 | Finance Coun |
| EVALUATE OBJECTIVES AND TASKS FOR THIS STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY | Board |

Chart of Tasks in Chronological Order

| Task | Due Date | Accountable |
|--|-----------------|--|
| R-2-1 Form a task force to hire a Youth Advisor. | COMPLETE | Board |
| R-3-1 Create an Adult RE Committee with a chair and a focus. | COMPLETE | Board |
| W-2-1 Develop a plan to purchase new hymnals. | COMPLETE | Worship Associates |
| CD-5-1 Select a chair for the Mentoring Task Force. | COMPLETE | Board |
| CD-5-3 Chair selects members to the Task Force. | COMPLETE | Board |
| CD-5-4 Mentoring plan developed and submitted to Membership Committee for input. | COMPLETE | Mentoring Task Force |
| CD-5-5 Board approves the mentoring plan. | COMPLETE | Board |
| CD-5-6 Mentoring plan Phase I launched. | COMPLETE | Mentoring Task Force |
| CD-6-1 Establish a committee to coordinate social activities. | COMPLETE | Board |
| \$-3-1 Pre-canvas advertising to members via monthly statements, reach, and Members Area of the website. | COMPLETE | Finance Council |
| FA-1-2 Continue current successful social action projects. | On-going | Faith In Action Council |
| FA-1-3 Partner with outside churches and other organizations whenever appropriate to further the OCUUC vision. | On-going | Faith In Action Council |
| FA-2-3 Develop guidelines for the distribution of funds on a short-term or one-time basis. | On-going | Faith In Action Council |
| FA-3-1 Take more visible stands on issues with broad congregational support in order to bring those issues to the attention of the larger community. | On-going | Faith In Action Council |
| FA-3-2 Publicize on-going and new service programs through the newsletter, website, and bulletin boards. | On-going | Faith In Action Council Communications Com |
| FA-3-4 Partner with other UU and local churches to develop fund-raising and service projects. | On-going | Faith In Action and Finance Councils |
| FA-3-5 Build and maintain a spirit of cooperation among social action and community outreach groups by creating and promoting clear guidelines and policies. | On-going | Faith In Action Council |

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| R-3-2 Coordinate with Young Adult Committee, Young Religious UU's. | On-going | Minister with Director of Children's RE |
| W-1-1 Ensure that messages from the pulpit are delivered by a minister or under the auspices of the Worship Associates and are religious and/or spiritual in nature. | On-going | Minister Worship Associates |
| CD-2-2 Continue UUA Journey Toward Wholeness Anti-racism Process. | On-going | Faith In Action Council |
| CD-2-3 Continue UUA Welcoming Congregation Program. | On-going | Faith In Action Council |
| CD-3-1 Develop a program that attracts young adults and families | On-going | RE and Young Adult Ministries |
| CD-3-2 Develop a plan to retain young adults and families. | On-going | RE and Young Adult Ministries |
| Com-1-1 Use the newsletter and website to highlight events. | On-going | Publicity Committee |
| Com-2-2 Insure that the website is updated weekly and the REACH is posted regularly. | On-going | Publicity Committee |
| Wk-2-1 Make all existing church and Board policies easily available to all. | On-going | Board |
| Wk-2-2 Make all operating and administrative procedures easily available to all. | On-going | Board |
| Wk-3-1 Provide recognition and competitive salaries for skilled staff in accordance with UUA guidelines. | On-going | Board |
| Wk-3-2 Assess the need for additional staff. | On-going | Board |
| F-2-3 Develop and maintain clear communication channels with congregation in order to build and sustain consensus. | On-going | Buildings and Grounds Committee |
| G-1-1 Strengthen and clarify leadership expectations. | On-going | Nominating Com. Board |
| G-1-2 Simplify program and governance structures. | On-going | Board |
| R-3-3 Offer Build Your Own Theology. | Annually | Minister |
| Com-2-3 Review the adequacy of publicity funding. | Annually in March | Finance Council |
| Wk-1-2 Assess program and committee health. | Annually in June | Board |
| EVALUATE OBJECTIVES AND TASKS FOR EACH STRATEGIC AREA AND REWRITE AS APPROPRIATE. | ANNUALLY June/ Sept | Board |
| R-2-2 Hire a Youth Advisor. | Feb. '06 | Board |

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| \$-2-2: Monthly articles on designated aspects of finance program mailed with pledge statements or posted on the Members Area of the website. | March '06 | Finance Council |
| \$-3-2: Pre-canvas budget statement created in line with Strategic Plan. | March '06 | Finance Council |
| \$-3-3: Review and evaluate accomplishments of past church year in order to realize needs in the coming budget year to satisfy the Strategic Plan. | March '06 | Finance Council |
| \$-2-1: Quarterly summary financial reports included in the Reach or on the Member Area of the website. | April '06 | Finance Council |
| G-2-1 Define what task forces are needed. | April '06 | Board |
| \$-1-1: Integrate the Strategic Plan into the Annual Budget | June '06 | Finance Council |
| R-2-3 Implement Bridging Program. | June '06 | Youth Advisor |
| R-4-2 Develop a program of Social Action Sundays | June '06 | DRE/CREC |
| CD-1-1 Review congregational approval of the Statement of Purpose. | June '06 | Board |
| CD-1-2 Evaluate the Mission Statement in light of comments from the '05 Vision Workshops. | June '06 | Board |
| CD-2-4 Develop activities/events that are intentionally intergenerational. | June '06 | CREC with Gatherings |
| CD-2-1 Research demographic composition of the county. | June '06 | Board |
| CD-4-1 Develop Outreach/Marketing Plan. | June '06 | Publicity |
| Com-1-2 Document a policy and procedures for congregation-wide e-mail messages. | June '06 | Publicity Committee |
| W-1-2 Draft policies concerning pulpit guests and their responsibilities. | June '06 | Minister with Worship Associates |
| Wk-1-1 Create a task force to assess needs and establish guidelines for congregational volunteer management. | June '06 | Board |
| Wk-1-2 Assign responsibility for volunteer management. | June '06 | Board |
| Wk-1-3 Develop volunteer management system. | June '06 | Board |
| F-1-1 Assess, identify and prioritize needs and recommend a process to complete those tasks. | June '06 | Buildings and Grounds Committee |
| F-1-2 Create committed teams to insure that the necessary work is accomplished. | June '06 | Buildings and Grounds Committee |

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| F-1-3 Continue to upgrade and fine tune audio-visual system with communication with staff and other appropriate people. | June '06 | Buildings and Grounds Committee |
| F-2-2 Recommend options to the Board to maximize present site. | June '06 | Buildings and Grounds Committee |
| G-2-2 Staff the task forces and create objectives for them. | June '06 | Board |
| G-2-3 Document all committee job descriptions and mission statements. | June '06 | VP Program Volunteer Coordinator |
| CD-5-2 Membership and PR committees define objectives for the Task Force. | July '06 | Membership and Publicity Committee |
| \$-4-1: Visual aids presented on bulletin board and in the Reach reflecting how collections are being met, i.e. "Pledge Thermometer". | August '06 | Finance Council |
| \$-1-2: Integrate the Strategic Plan into a 5-year budget projection that will allow for step-by-step implementation of the Plan, while being prepared for site specific future needs. | Sept. '06 | Finance Council |
| R-1-3 Ensure that children and youth are responsible for visible rolls at Sunday Worship Service. | Sept. '06 | Minister/DRE |
| R-4-1 Work with the Minister and Worship Associates in creating a new service format which will appeal to families, children and youth. | Sept. '06 | DRE/CREC |
| W-2-3 Work with the DRE and CREC in creating a new service format which will appeal to families, children and youth. | Sept. '06 | Minister Worship Assoc. |
| Com-3-1 Create a plan of succession for the Reach Editor and the webmaster | Sept. '06 | Board |
| Com-3-2 Distribute these policies to church leadership and post on Members Area of the website. | Sept. '06 | Board |
| CD-6-2 Research feasibility for providing transportation for appropriate members to appropriate church activities. | Dec. '06 | Pastoral Care |
| W-1-3 Establish a task force to investigate congregational interest in forms of alternative worship. | Dec. '06 | Minister with Worship Associates |
| W-1-4 Finance Council conducts an impact study of presenting alternative services. | Dec. '06 | Finance Council |

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| W-2-2 Children and youth participate in the worship service. | Dec. '06 | Minister with Worship Associates |
| R-1-1 Increase the number of intergenerational services and activities to at least once a month. | Dec. '06 | Minister with Director of Children's RE |
| Com-2-1 Use and build on the UUA ad campaign; join with other Orange Co. UU Churches to attract new members and visitors. | Dec. '06 | Publicity Committee UUA |
| F-1-4 Create a maintenance plan, job, and budget to systematize and project needs for all three buildings, the grounds, and supportive systems. | Dec. '06 | Buildings and Grounds Committee |
| G-1-4 Evaluate Program Council structure. | Dec. '06 | VP Program |
| FA-1-1 Create and update a 5-year rolling plan approved by the congregation. | June '07 | Faith In Action Council with the Board |
| FA-3-3 Organize forums and workshops to train congregation members, friends, and youth. | June '07 | Faith In Action Council |
| R-1-2 Articulate clearly what we want our children and youth to know. | June '07 | Children's Religious Education Committee |
| Com-2-4 Consider a name for the church that reflects our values and mission. | June '07 | Board with Congregation |
| G-1-3 Create a Standard Operating Procedures Manual. | June '07 | Board |
| G-2-4 Include youth and or young adult representative(s) on the Board. | June '07 | Nominating Com. Board |
| G-3-1 Create a Judicial/Mediation Council | June '07 | Board |
| CONGREGATIONAL VISION WORKSHOP | JAN. 2010 | Long Range Planning Committee |