

**Winchester Unitarian Society
Strategic Planning Task Force
Report to the Congregation
May 12, 2010**

DRAFT

“Be Bold: The Strategic Plan for the Winchester Unitarian Society 2010-2015”

Four Strategic Opportunities:

- **Attract and nurture a larger, more deeply engaged membership**
- **Build higher visibility and better communications**
- **Adjust our governance and committee structure to reflect who we are today and who we wish to be tomorrow**
- **Open a healthy and ongoing dialogue about money and its role in church and spiritual life**

Please Note: Each of the **Strategic Opportunities** is supported by preliminary thoughts from the Strategic Planning Task Force (SPTF) regarding Backdrop, Goals, Work Steps and Measures. The Standing Committee (SC) has not approved these and the congregation is not being asked to endorse them. They have been included as a “hand-off” to those who will continue work on implementation, assuming the Four Strategic Opportunities are endorsed.

Preamble

Be Bold: Four Strategic Opportunities for the Winchester Unitarian Society

One year ago, our congregation adopted a bold Vision Statement in answer to two big questions: “Who do we want to be?” and “Where do we want to go?” The Strategic Planning Task Force, with its gaze fixed on that vision of what our church, at its best, would look like from the outside and feel like from the inside, set to work to answer the next big question: “How do we get there?” Today we bring you our answer.

If you re-read the Vision statement, you will see that the document describes many things that our church already does well, as well as things we wish to do more of or do better in the future. The ongoing work of ministers, members, staff and committees is, and will continue to be, guided by that vision. Sitting down to chart the congregation’s next steps, the SPTF saw how much is already underway. But we also identified factors that limit us, that hold us back from moving swiftly, with the wonderful new energy we all feel, toward our envisioned future. The SPTF has framed these as **four strategic opportunities** we would like to see the congregation step up and embrace. By your vote today, we are asking you to endorse our plan and to commit yourselves to it. Let’s answer our ministers’ call to “Be Bold.” If we meet these challenges, all else becomes possible.

Attract and nurture a larger, more deeply engaged membership

- Create a clear path from visitor to member, engage each and every member in deepening their involvement in line with their interests and in support of their spiritual journey
- Create and practice a culture of welcome that draws visitors through our door and deepens our relationships with each other

Build higher visibility and better communications

- Increase awareness in the broader community of Winchester Unitarian Society, who we are, what we stand for, what we have to share, in order to live our values boldly, influence the greater world and bring people in the door.
- Better inform our own members and friends about events, opportunities, decisions and processes

Adjust our governance and committee structure to reflect who we are today and who we wish to be tomorrow

- While retaining mutual accountability and valued traditions, ensure our governance structure allows for collaboration, flexibility, and innovation, makes lines of authority and accountability clear, provides opportunities for leadership development, and reflects the demands on our limited time
- Ensure adequate and appropriate ministerial hours and staff support for the programs we offer and our ambition to grow

Open a healthy and ongoing dialogue about money and its role in church and spiritual life

- Practice routine and candid communications on the relationship between our congregation’s financial strength and our ability to achieve our vision
- Embrace financial generosity as an important aspect of our shared spiritual life
- Create a feeling of enthusiasm in our congregation around all aspects of giving!

“Be Bold: Four Strategic Opportunities for the WUS” is a call to action. Upon receiving the congregation’s endorsement and commitment to help carry it through, the Standing Committee and the Co-Ministers will take responsibility for organizing the work of the plan.

The Strategic Planning Task Force:

Don Seymour, Chair

Marilyn Mullane & Carol Cashion, Standing Committee Liaisons

Linda Battaglini

Revs. John and Sarah Millspaugh, ex officio

Vern Blodgett

Mary Ann Young, Church Administrator

Holly Clifford

Jeremiah Gold-Hopton, Intern

Jake Dacey

Melissa Pullin

Deb Seymour

Mission Statement 2009

The Winchester Unitarian Society is a welcoming, caring community devoted to spiritual growth, social transformation, and environmental responsibility. Guided by Unitarian Universalist principles and drawing on diverse faith traditions, we live our values through worship, reflection, connection, and service.

Vision Statement 2009

As a congregation serving the Mystic Valley area of Boston, we are dedicated to:

- **Nurturing Spiritual and Personal Growth**

We provide diverse and compelling ways for people of all ages to grow in spirit, conscience, and wisdom. Our worship services, educational programs, music, and service initiatives inspire children, youth, and adults to live with greater purpose, respect, and love.

- **Building and Enjoying Community**

All newcomers and members feel welcome, comfortable, and appreciated for who they are. A wide variety of programs and activities help us deepen our involvement in the community, discover our shared passions and concerns, learn from our differences, and connect across generations and traditional barriers.

- **Offering Mutual Care and Support**

We comfort and assist each other through all of life's stages and difficulties by offering small group ministries, pastoral care, and other formal and informal support networks.

- **Serving the Greater Good**

We organize meaningful advocacy, outreach, and service work to express our common commitment to social justice and environmental responsibility. As a flagship congregation, other organizations and members of the community at large turn to us for guidance, support, and resources.

- **Sharing Ministry and Facilitating Strong Leadership**

A congregationally-run organization, our members democratically select our leaders and contribute substantial time, talent, and financial resources to the programs and ministries of the church. We enjoy exceptional professional leadership in all major program areas of our shared ministry, including worship, lifespan education, youth programs, and music. To empower ministers, staff, and lay leaders to thrive in their individual roles and fulfill their collective mission, we provide ongoing professional development opportunities, share helpful feedback, and cultivate broad, deep, and sustainable leadership.

- **Revitalizing Our Beloved Building**

We steward the historic beauty of our facilities and grounds and make them more functional, inviting, accessible, and environmentally sustainable for ourselves and future generations.

- **Incorporating Innovation**

As an evolving faith, we welcome and integrate innovative ideas, technologies, and practices that will help us improve all that we do, especially our ministries, programs, and outreach.

Nurture Your Spirit, Help Heal Our World

I. Attract and nurture a larger, more deeply engaged membership

Backdrop:

- We don't currently have the structures and processes in place to fully engage members, and to attract, welcome and retain visitors and friends.
- Membership is "owned," in bits and pieces, by several different committees, ministers and staff; therefore, many key elements of membership welcome, integration and engagement get lost.
- Culturally we are "Winchester centered" which feels exclusive and not welcoming.

Goals:

1. Build, sustain and retain membership.
2. Create a clear path from visitor or friend to member.
3. Provide easy and obvious steps to engage each member in deepening their involvement in line with their gifts and interests, and in support of their spiritual journey.
4. Conduct ourselves in a manner that welcomes others so that they seek to come and be engaged.
5. Deepen our relationships with one another.

Work Steps:

1. Institute a systematic process for newcomer integration and tracking.
2. Raise awareness in all church programs through workshops and other activities on how we can be less Winchester centric and more welcoming and inclusive.
3. Clarify expectations of membership and adopt a Membership Covenant.
4. Clearly define roles, responsibilities and authority of the disparate committees and individuals currently involved with membership
5. Establish a central coordinating mechanism for membership. This might be a new Membership Committee, a current committee or an individual.
6. Provide staff support for the coordinating body/individual.
7. Restructure communications to increase engagement and awareness. This is not limited to utilization of information technology but should consider the advantages of innovative IT functions such as Facebook, podcasts, live streaming and creation of a more dynamic website.

Measures:

1. Number of members, visitors and friends.
2. Retention of members.
3. Conversion rate of visitors and friends to members.
4. Number of member leavings and number of inactive members.
5. % of individuals in volunteer positions.
6. Number of attendees per year.
7. Average number of individuals attending Sunday services.

II. Build higher visibility and better communications

Backdrop:

- Unitarian Universalism in general and the Winchester Unitarian Society in particular are well-kept secrets.
- Within Winchester, the building is well known, but what goes on within its walls is not.
- Desire expressed in Vision Statement to share what we do well with other churches, to become a “flagship congregation,” which requires a bolder communications strategy.
- Desire expressed to expand our reach beyond Winchester to other regional communities.

Goals:

1. Increase awareness of the Winchester Unitarian Society in the broader community: what we stand for, what we do, what we are proud of, what we have to share in order to:
 - Influence the greater world
 - Live our values boldly, and
 - Bring people in the door.
2. Better inform our own church members and friends about events, opportunities, decisions and processes.

Work Steps:

1. Develop an approach to increased publicity of church events.
2. Consider utilization of our building for community events.
3. Develop an approach to using our resources, including the building, ministers, staff, members, social outreach grants and other committee work, to increase the community visibility of our mission, vision and purposes.
4. Determine an approach to using technology to enhance communication, including communications within the church and between members and groups.
5. Define responsibilities, authorities and accountabilities for the above.

Measures:

1. Increased membership, community events, attendance at WUS events.
2. Increased publicity in Winchester Star and other media with greater (i.e. beyond Winchester) regional coverage.
3. Recognition (in the greater world outside of WUS) for social justice activity.

III. Adjust our governance and committee structure to reflect who we are today and who we wish to be tomorrow

Backdrop:

- Many years of transition left little time for examination and updating of our organizational structure and the By-Laws.
- Now in a settled ministry we need to align our structures with our mission and vision
- Our current structure makes it difficult to be organizationally flexible (for example: no committee has responsibility for the core environmental aspect of our mission).
- We have repeated difficulty filling key leadership roles.
- Authority, responsibility and accountability for decisions that need to be taken is often unclear, encumbering work and consumes too much time and energy.
- The time demands of serving our congregation and supporting the programs currently exceeds the hours of one fulltime minister equivalent..

Goals:

1. Take a "blue ocean" view of designing the organization structure that will work best for who we are and who we hope to become.
2. Develop a contemporary leadership model that reflects who we are, who we aspire to become and the demands on our limited time.
3. Provide adequate and appropriate ministerial hours and staff support for the programs we offer and our ambition to grow our membership.
4. Address any gaps or limitations in our current organization structure and leadership approach.
(Note: these will be identified through the work steps below.)

Work Steps:

1. Define roles, responsibilities and accountability for committees, groups, ministers and staff.
2. Evaluate alternative structures for WUS organizational structure and leadership roles and responsibilities. Develop Best Practices.
3. Develop a policy and procedures manual based on the clarification of roles, responsibilities, authority and accountability.
4. Recommend changes to the bylaws.
5. Develop a rolling three year staffing plan to provide stability and continuity for our work.

Measures:

1. Shared ministry measure: is the lay volunteer base taking on work that would otherwise have to be done by ministers or other staff and vice versa?
2. Implementation of a rolling three year staffing plan.
3. Revised committee charges clarifying responsibilities and authority; specifying accountability.
4. Revised minister and staff job descriptions clarifying responsibilities and authority; specifying accountability.
5. Revised bylaws.
6. A policy manual

IV. Open a healthy and ongoing dialogue about money and its role in church and spiritual life

Backdrop:

- Talking about money is seen as threat to spiritual life rather than as an expression of spirituality and a tool for supporting it.
- We have cultural challenges around raising and talking about money and little enthusiasm within the congregation for fundraising (for example, in 2010 we had no lay leader for the Pledge Drive). This has an impact on the annual pledge drive, capital campaigns, planned giving and the endowment. Some of those cultural challenges include:
 - Members who are unaccustomed to the UU practice of substantial, annual voluntary giving which is central and necessary for a self-sustaining, self-governing church.
 - Distaste for talking about money within the context of church, perhaps because many members see the church as a community of equals in which money and economic status are not the highest values, as they often seem to be in the greater community.

Goals:

1. Achieve a cultural shift in how we think and talk about money at church
2. Incorporate into the fabric of our organization routine and candid communications and discussions on the relationship between our financial strength and our ability to achieve our goals and aspirations. Shape, articulate and achieve buy-in to goals and aspirations that get people excited about possibilities that could be achieved with higher levels of giving.
3. Embrace financial generosity and members' financial responsibility for the well-being of the church as important aspects of our shared spiritual lives.
4. Engender a feeling of enthusiasm in our congregation around all aspects of giving.

Work Steps:

1. Define the problem: what gets in the way of our uniting behind exciting goals?
2. Use our denominational resources such as the Mass Bay District to identify "best practices."
3. Outline optimal timeframes for organization of Pledge Committee and Pledge Drive (for example organize the Annual Pledge Committee in the spring simultaneously with other committees).
4. Learn from others, both UU and other denominations. How do others do this?
5. Transition to ESG (Environmental, Social and Governance) investment criteria.
6. Change the by-laws to state that pledging is a duty of membership.
7. Continue implementation of the planned giving initiative.
8. Determine Metrics to measure success.

(Note from SPTF: this work should not be done by the 2011 pledge drive committee which will already be busy.)

Measures:

1. The Winchester Unitarian Society approaches giving with a sense of excitement as opposed to dread. This is manifested by:
 - A willingness to lead and participate in the annual pledge drive, capital campaigns, planned giving and the endowment.
 - An increased number of pledge units, capital campaign contributors and planned giving participants.
 - Reduced dependence on the endowment for general operating expenses and clarification of how the endowment is to be used.
 - Growth in dollars given to the annual pledge drive, capital campaigns and planned giving.
2. Policies have been developed to provide comprehensive description of our approach to the annual pledge drive, capital campaigns, planned giving and the endowment.
3. Plan implemented for Planned Giving.

Summary of Process

1. In 2009 the Winchester Unitarian Society undertook an extensive process to develop a mission statement and a vision statement for 2015. This was a bottom-up process engaging all members who chose to participate. The result was two clear and relatively concise statements of our aspirations for the future. A Strategic Planning Task Force (SPTF) was formed and charged with developing strategies in pursuit of the mission and vision. As part of this charge the SPTF was asked to develop specific goals and measures related to each of the eight aspirations in the vision (the SPTF came to refer to these eight aspirations as "pillars").
2. The SPTF began its work in January, 2010. We centered our discussions on the Mission and Vision Statements, with reference to other key documents for additional guidance: the 2007 Search Congregational record, the 2007 Assessment Report and the 2009 Visioning Workshop Goals and Activities list. We have had some spirited debate which, given our task, is a positive indicator that we have thought hard about the charge given to us.
3. The Standing Committee (SC) accepted the SPTF's subsequent suggestion to focus the SPTF's work on "foundational initiatives" that would be most important to the Winchester Unitarian Society in living its mission and fulfilling its vision. That is, the SPTF would not attempt to develop goals and measures tied directly to each of the eight pillars in the vision.

On April 14, 2010 the SC endorsed the strategic plan recommended by the SPTF:

a. Statement of Intent: Be Bold

b. Four Strategic Opportunities:

- **Attract and nurture a larger, More deeply engaged membership**
- **Build higher visibility and better communications**
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5. The purpose of the congregational meeting on May 2 is to provide an opportunity for questions regarding the SPTF's work.
6. On May 23, 2010 the congregation will be asked to approve the strategic plan during the annual meeting.