
FAITH IN OUR FUTURE

STRATEGIC PLAN 2011-2016



First Unitarian Universalist Congregation of Ann Arbor

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EXECUTIVE SUMMARY

Our congregation's vision and mission are guided by our denomination's statement of Principles and by our own congregation's statement of Core Values which begins as follows.

We join together in community to encourage and inspire each other's spiritual journeys, to honor and care for the natural world around us, and to join forces in furthering social justice in the Ann Arbor area and the wider world.

Our "Faith in Our Future" Strategic Plan 2011 synthesizes our congregation's many voices into one composition of aspirations and recommended actions to help the Board of Trustees and professional staff strive over the next five years to actualize our goals and realize our potential as a uniquely radical liberal religious community in the world.

We proceed with respect for our past, plans for our present, and faith in our future.

Overview of the Strategic Planning Process

The Strategic Planning Task Force, under the leadership of Co-Chairs Bruce Gibb and Terry Madden, listened to program/ministry leaders, staff and members of the congregation about needs, ideas and aspirations. We helped program leaders set down five year goals and objectives rooted in our Core Values. We studied the staffing and governance recommendations from an Alban Institute consultant on how to run our church so that it can sustain and inspire our membership and programming.

Our Findings

Our overarching **challenge** is to develop fully into a Large Church with all the engagement, excitement and impact on our world we know we have the potential to achieve. Our challenge is to become a large church in more than number of members. We have a vision of what we can be: a large voice for love and justice in our congregation, our community and in the world.

Growth is implicit in the goals and objectives of all of our programs and ministries. We have already grown from what the Unitarian Universalist Association classifies as a "Program Church" to a "Large Church". We are now the largest Unitarian Universalist congregation in Michigan and one of the 35 largest Unitarian Universalist congregations in the U.S. We need to embrace and manage growth at First Unitarian Universalist Church of Ann Arbor. Strengthening our programs/ministries and improving our staffing and organization could accelerate growth beyond the almost 700 members predicted for 2016. All of our programs/ministries have goals and objectives that anticipate and welcome this growth. We need infrastructure to support the programs/ministries and to meet the needs of an increasingly large congregation.

As we gathered ideas, goals and objectives from program leaders, members of the congregation, and staff, **four themes that cross all program areas** emerged. These themes are all related to the overall theme of Growth and Size: 1- The need to maintain personal connections, 2- The desire to enlarge our voice and extend our influence beyond our walls, 3- The need for more program integration and 4- The need for improved communications at all levels.

Recommended Actions

The Strategic Planning Task Force based our recommendations on: 1-the leverage provided to support the Congregation's goals; 2- the urgency of need; 3- a realistic projection of our ability to fund these recommendations. We listened, reflected and used our powers of discernment to recommend actions which we believed were most likely to support and extend the ability of the Congregation to bring our Core Values to life.

We recommend actions in five areas: 1- Staffing, 2- Governance, 3- Facilities & Technology , 4- Culture and 5-Finance. Recommendations include recommended sequencing over the five years between 2011-12 and 2015-16.

Staffing Recommendations

1. Provide administrative support to the Senior Minister
2. Establish a new Programs Coordinator position to oversee communications, technology, and program coordination.
3. Increase Spiritual Growth and Development (SGD) staffing levels. Focus the effort of the Programs Coordinator on this area initially to maximize benefit to this high leverage program.
4. Establish a position of Social Justice Coordinator.
5. Increase the appointment of the Music Director.
6. The Task Force fully supports the CEO in implementing the recommendations of the Alban Institute consultant.
7. The Task Force supports the establishment of a position for a Development Coordinator.
8. The Task Force recognizes the potential need to re-configure and/or add administrative/office staff or adjust other FTEs as conditions within the congregation change, as in substantial growth or other factors.

Governance Recommendations

1. Set priorities for a strategic plan, based on the work of the Strategic Planning Task Force, that focuses the energy of the Congregation and guides its budget priorities and staffing decisions.
2. Develop an annual cycle to monitor progress based on strategic initiatives and report progress to the Congregation.
3. Unify processes that Ministries/Programs use to implement their program objectives.
4. Ensure a long-range staffing plan and budget in support of the strategic initiatives.
5. Support the laity in understanding of the Core Values/Ends of the Unitarian Universalist Church of Ann Arbor, the narrative of the strategic plan, and the Unitarian Universalist Church of Ann Arbor 's potential as a large church. Help members to understand and "to

live into their roles as discerners, owners, governors and ministers” through dialogue and the development of lay leadership.

6. Regularly reflect on and monitor the effectiveness of the Board and its collaboration with the staff team as we develop in our capacity for policy governance. The Board’s review will include clarifying where we stand along three continuums: more involvement vs. less involvement; over-control vs. under-control; and past vs. future focus. Continue the development of Board policies in the area of discernment, strategy, and oversight including program and staff evaluation, as discussed by Susan Beaumont in the Alban Report, p. (22)

Facilities and Technology Recommendations

1. Establish a Technology Team to assess, coordinate, plan and oversee this area.
2. Update Congregational Database software to enable remote access and add modules that provide additional information tracking/analysis abilities
3. Add / Upgrade computer hardware & software as needed .
4. Add new Audio-Visual systems with improved “auxiliary” audio (for hard of hearing). Keep in mind that later need to add multi-media capabilities.
5. Upgrade technology for projection of multimedia in SGD classrooms, Phifer Sanctuary and Jackson Chapel, including window/daylight shading
6. Enable video streaming / conferencing with audio & video recording capability to (a) receive & project external events like UU General Assembly, and (b) to transmit internal events, for example live-stream a music festival to the web for others to see who cannot attend in person. Recording equipment should be available to capture audio and/or video so they can be made available on websites, DVD’s, etc. Implement the already present capacity for sermons to be available on the congregation’s web site.
7. Analyze/survey the needs of the congregation and develop a Transportation plan to improve transport options (carpooling, ridesharing, car-sharing (Zipcar), purchase/lease a van, etc Options should be considered and evaluated for implementation including leveraging the database to share information for coordinating carpooling / ridesharing. Other options to consider include purchasing/leasing a handicapped equipped van.
8. Perform deferred maintenance and/or identified energy efficiencies (add insulation) Deferred maintenance should be prioritized and performed (drywall, paint, etc). This should include a review of energy efficiency options that may not have been implemented yet (insulation, etc.)
9. Create a comfortable space (with appropriate furnishings) that could be used for Pastoral Care, Chalice Circles, etc. Staff offices and meeting space should be reconfigured to support the increased staffing needs.
10. Refurbish parking lot and (Ann Arbor Saline Road) entrance. A permeable pavement option should be evaluated (for cost, environmental impact and long-term durability). This should also include a review of entry-way improvements to both improve visual “curb appeal” aesthetics and to provide safer entrance/exit to the facility

11. Improve outdoor gathering areas (beginning with the area outside the social hall) and the access trails to the outdoor worship area. The area outside the social hall should be enlarged and improved for more gathering space and the outside worship area needs to be improved to enable outdoor services.
12. Include needs assessment for storage in site plan work.
13. Update and maintain a Master Site Plan. The Master Site Plan is currently undergoing updates that will provide more details and project dependencies. This updated Site Plan (expected first quarter 2012) should be regularly reviewed, updated and communicated. Priorities need to be reconciled with the recommendations of this strategic plan.

Culture Recommendations

1. **Board of Trustees:** Clarify divisions between staff/ membership roles in the programs of the congregation. The dialog should "focus on the role of laity as discerners, owners, governors and ministers".
2. **Board of Trustees** to identify and implement ways for our members to move to Large Church thinking and practice.
3. **Find our greater voice.** Speak out through our Senior Minister/CEO within the community, state, UU District, and Nation.
4. **Board of Trustees and Senior Minister/CEO** to find ways to build capacity in the Congregation to accept and work with the type of structure of authority and accountability required by a Large Church which some call "hierarchy" while maintaining our commitment to the democratic process.
5. **Board of Trustees and Senior Minister /CEO** work together with the members of the Congregation to continue to build a culture of Abundance and Generosity so that we have the means to bring our Core Values/Ends to life.
6. **Board of Trustees and Senior Minister** find ways to empower members individually and collectively to each find their own place, their own ministry in our noble and challenging work/goals/endeavor.

Finance Recommendations

1. Board of Trustees approves three-year capital campaign in 2012.
2. Board of Trustees monitors the progress of the capital campaign.
3. Board of Trustees and SENIOR MINISTER/CEO continue to develop annual operating budgets and monthly monitoring of the congregation's finances.
4. Board of Trustees and SENIOR MINISTER/CEO develop a year-round stewardship committee that educates the congregation and integrates all of the stewardship activities of the congregation with the assistance of a Development Coordinator.

5. The Board of Trustees and the SENIOR MINISTER/CEO and the congregation need to secure adequate financial resources to fully fund the congregation's aspirations and the recommended actions of this strategic plan.
6. The Board of Trustees, the ministers and staff and the congregational leadership need to nurture a culture of abundance and a spirit of generosity among the members of our congregation.
7. All members and staff need to ensure that we align our aspirations with our ability to fund them and to ensure that we are effective stewards of our financial resources

Program/Ministries Goals and Objectives: Please consult Appendix A for goals and year-by-year objectives for each Program/Ministry that participated in the strategic planning process.

Next Steps

An annual review of progress in achieving goals and objectives on the program/ministry level and on the Congregational/institutional level is essential for the success of this plan. A new strategic plan should be started in the third year (2014).

We note that this plan has been developed through extensive listening to all in the congregation who chose to participate. We believe that while the Board of Trustees and the Senior Minister/CEO are accountable for the implementation of the Recommended Actions, **it is the Congregation of First Unitarian Universalist Church of Ann Arbor who owns this plan. It is the responsibility of all of us to participate in meeting the challenges.** It is the Congregation who will do the work of ministries and fund them. It is the Congregation who will make our Core Values come alive, and bend the arc of history toward justice.

I. INTRODUCTION

A. BACKGROUND

We are Unitarian Universalists, a liberal religious community engaged in an authentic search for truth and meaning. We use reason and compassion as our ethical guide for the here and now to create a better world.

We trace our FIRST UNITARIAN UNIVERSALIST CONGREGATION OF ANN ARBOR (UUAA) origins to the Articles of Association signed in Ann Arbor, Michigan on May 14, 1865, which established our congregation, “for the purpose of maintaining religious worship and conducting the temporal interests of a religious society.” From the early days of our origin the Unitarians of Ann Arbor took the radical position expressed in their battle cry, “Mercy to the South – Death to Slavery.”

The Humanist Manifesto was edited here by one of our congregants and the principles incorporated into our UU Principles, stressed a radical break from traditional orthodox religious traditions.

In the 1980s, the UUAA boldly declared ourselves a “Sanctuary” for a family from El Salvador fleeing from political persecution and seeking a safe haven.

Today we continue to provide a safe haven and a welcoming community for alternative religious viewpoints, various ethnic and racial identities, and diverse sexual identities.

Our uplifting Sunday Services bring together our diverse musical voices in harmony, while our spoken voices find common expressions in our Core Values which help bind our religious community together.

Our outstanding Spiritual Growth and Development program allows our youth to engage in a guided search to find their voice while building their own theology.

Our “Faith in Our Future” Strategic Plan 2011 captures our congregation’s multiple voices and synthesizes these many voices into one composition to help the Board of Trustees and Professional Staff strive over the next five years to actualize our goals and aspirations and realize our potential as a uniquely radical liberal religious community in the world.

We proceed with respect for our past, plans for our present, and faith in our future.

B. PLANNING PROCESS

The “Faith in Our Future” Strategic Planning Task Force 2011 members are: Jim Breck, Bob Dinan, Kathy Friedrichs, Bruce Gibb, co-chair, Bob Hospadaruk, Terry Madden, co-chair, Paul Morris, Margaret Pekarek, Leigh Robertson, Sandy Simon; Board Liaisons: Joan Burleigh, Tom Reischl; Senior Minister: Rev. Gail R. Geisenhainer.

Unitarian Universalist Principle 5 “The right of conscience and the use of the democratic process within our congregations and in society at large.” guided our strategic planning process.

Rather than follow the typical corporate model of strategic planning, which would have a small professional planning group write a strategy approved and implemented by top management, we decided to build the plan from the bottom up and the top down. We started by engaging the program leaders of the First Unitarian Universalist Congregation of Ann Arbor (UUAA) in determining the status of their programs/ministries, their aspirations for the next five years, their needs, and how they benchmark their programs/ministries. Following our democratic principle we then engaged everyone in the congregation who had an interest in planning for the future to voice needs and aspirations.

With the information from these two sources, we met again with the program leaders to set the specific five-year goals and annual objectives found in [Appendix A](#). These goals and objectives were reviewed by the ministers and staff to be sure they were consistent with their mandates and with the Board of Trustees to be confident that our planning process and results were consistent with their charge to the Task Force.

After gathering and considering the UUAA program goals we directed more attention to our goals as a church institution, the administration, facilities and technology that make our rich programming possible. We were fortunate to have the August, 2011 report of the Alban Institute Consultant to guide us in the recommended staffing and governance of a church of our size and level of programming.

All of our aspirations are rooted in our UU Principles and our UUAA Core Values. [Section II-B](#) correlates key program objectives with our core values. [Section II-C](#) discusses our aspirations as a model institution whose staffing and facilities are capable of supporting and inspiring the work of our congregation as it strives to live our Core Values.

C. FOUNDATIONS

Our congregation's vision and mission are guided by our denomination's statement of Principles grounded in our Six Sources and by our own congregation's statement of Core Values. We include them in this document as the perspective for our strategic planning for the next five years.

THE SEVEN UNITARIAN UNIVERSALIST PRINCIPLES AND THE SOURCES

Seven Principles

We affirm and promote

- 1. The inherent worth and dignity of every person;*
- 2. Justice, equity and compassion in human relations;*
- 3. Acceptance of one another and encouragement to spiritual growth in our congregations;*
- 4. A free and responsible search for truth and meaning;*
- 5. The right of conscience and the use of the democratic process within our congregations and in society at large;*
- 6. The goal of world community with peace, liberty, and justice for all;*
- 7. Respect for the interdependent web of all existence of which we are a part.*

Unitarian Universalists strive to listen, learn and grow from teachings that come from many diverse sources, including:

Direct experience of transcending mystery and wonder, affirmed in all cultures, which moves us to a renewal of the spirit and an openness to the forces which create and uphold life;

Words and deeds of prophetic women and men which challenge us to confront powers and structures of evil with justice, compassion, and the transforming power of love;

Wisdom from the world's religions which inspires us in our ethical and spiritual life; Jewish and Christian teachings which call us to respond to God's love by loving our neighbors as ourselves;

Humanist teachings which counsel us to focus on this life and how to ethically treat others, to heed the guidance of reason and science, and warn us against idolatries of the mind and spirit;

Spiritual teachings of earth-centered traditions which celebrate the sacred circle of life and instruct us to live in harmony with the rhythms of nature.

First Unitarian Universalist Congregation of Ann Arbor

Core Values

The First Unitarian Universalist Congregation of Ann Arbor, MI has been deeply committed to liberal religious thought and action since 1865.

We join together in community to encourage and inspire each other's spiritual journeys, to honor and care for the natural world around us, and to join forces in furthering social justice in the Ann Arbor area and the wider world.

- 1. Spiritual life** We find inspiration, renewal, and challenge in worship services. Children, youth and adults are enriched by classes and programs that expand religious understanding and nurture spiritual growth rooted in Unitarian Universalist traditions and values.
- 2. Social Justice and Environmental Action** We live our beliefs by creating, sustaining, and enhancing programs that actively engage congregants of all ages in projects that promote peace, justice, and positive environmental action locally and beyond.
- 3. Community** We create and foster community by providing an intentionally welcoming and safe environment where all feel valued and cared for, and where all are given opportunity to form meaningful connections with one another. We foster a climate of purposeful inclusion of all. We cherish the diversity of gender, age, race, ethnicity, national origin, range of abilities, sexual orientation, gender identity, financial means, education, and political perspective. We live together in peace, search for truth in love, and help one another.
- 4. Stewardship** We are all active stewards, serving our congregation and pursuing our ministries through prudent and creative use of our resources, whether physical, environmental, financial or human. We show respect and care for our beautiful building and grounds, for our staff, and for one another. We cultivate right relationships among Members of this congregation and with the wider world.
- 5. Culture** We are nourished by the culture that has evolved in this congregation throughout our rich liberal religious heritage in Ann Arbor, a culture rooted in our core belief in the inherent worth and dignity of every individual. We learn and grow from our differences. We value our connections, past, present and future, to the Unitarian Universalist world network.

II. OUR CONGREGATION IN 2016

The underlying purpose of any strategic planning should be to guide the congregation toward fulfilling our stated mission, best articulated in the introduction to our Core Values.

We join together in community to encourage and inspire each other's spiritual journeys, to honor and care for the natural world around us, and to join forces in furthering social justice in the Ann Arbor area and the wider world.

A. A VOICE IN THE ANN ARBOR AREA AND IN THE WIDER WORLD

The Reverend Gail R. Geisenhainer in her sermon "Faith in Our Future" (full text in [Appendix B](#)) challenged and inspired our congregation to look outward, to make a difference, to be a strong voice in our community and our world. Her challenge is an articulation of our aspirations for and responsibilities to those in the United States and in the world.

In a world where we continue the ancient and barbaric practice of teaching our children to kill and calling it peace keeping..., who will rise up and say, "Enough! We know we can do better than this?" Who will insist that we turn away from declaring the non-personhood, the non-value of people who are different than we are? We call this "othering." Who will do the work of insisting we value the inherent worth of each person? Who will rise up and decry the bankrupt theologies of dominion that guide us to pillage the planet to benefit the few and subjugate the many? Who will do all the work of evolution and revolution in our schools, in our law enforcement agencies, in our armies, our offices, our playgrounds, our movies, in our homes? Who will rise up and decry the evil that guides our legal system to incarcerate so many of our young men, our black men?...

We need innovation and progress. And we need conservation of enduring truth, a nurturing of the best of the past. That is the sacred trust of religious community, to heed the voices of prophecy while we respect the wisdom of ancestors. We seek to establish "a freedom that reveres the past but trusts the dawning future more."...

Large congregations will contribute to shaping the education and nurture of children to meet the unique demands of the next century. They can pioneer sustainable, mindful eating, food distribution, local food assistance across socio-economic boundaries. They can move the public conversation around sustainable sources and uses of energy and natural resources. And large Congregations will continue to have a formative effect on shaping a social ethic that insists on justice for all. And large Congregations will have a critical role to play in turning our governments away from a theology of dominion and incarceration toward a practice of stewardship and the respect for persons.

We will be equipped with a theology of stewardship, interconnection, mutuality and sustainability. Unitarian Universalism teaches the wisdom we need to make the changes we need to make in the 21st Century.

Our congregation engages these issues directly through our relationships with our external stakeholders: the Unitarian Universalist Association, the Heartland District of the Unitarian Universalist Association, the Congregations with whom we have partnerships in India and Transylvania, the Michigan Unitarian Universalist Social Justice Committee, other local Churches, and the communities of Southeastern Michigan.

Some of our programs/ ministries have goals to reach out to our Ann Arbor community and to contribute to our District and National Unitarian Universalist efforts. For example, our Interweave group wants to increase their participation in social justice in Michigan. Our Partner Church program engages directly with our Unitarian partner church in Kézdivásárhely, Romania. Our Chalice Circle Ministry wants to become a model for the district. Our Music program wants to host a district choir gathering and our Social Justice Council wants to become a strong voice for social justice in the world.

B. PROGRAM/MINISTRY GOALS ROOTED IN OUR CORE VALUES

Our program leaders and staff have invested much time on thoughtful reflection and deliberation in developing the five year program/ministry goals and institutional changes presented in this document. The goals and objectives are most easily presented and tracked by program area/ministry (see [Appendix A](#)) but it is important to examine the goals to see how they reflect and bring life to the five areas of the Core Values that support our congregation's vision. The goals described below are excerpted from the Program Five Year Goals and Objectives.

1. Spiritual life

We find inspiration, renewal, and challenge in worship services. Children, youth and adults are enriched by classes and programs that expand religious understanding and nurture spiritual growth rooted in Unitarian Universalist traditions and values.

Over the next five years we will provide a richer diversity of worship service offerings and Chalice Circle offerings to serve the needs of a larger and more diverse congregation. New service times will be added and some services may take place in alternate locations such as accessible natural settings on the property.

New technology will allow different media to be incorporated into services. More lay adult and youth members will assume meaningful roles in services as readers, musicians and ushers.

An executive assistant will allow the Senior Minister more time for worship service development.

Some worship services and Chalice Circles will be designed to appeal to specific audiences such as young adults or seniors. Chalice Circles will be expanded to outlying communities making meaningful community through small group ministry accessible to people in an expanded geographic area. Some participants might even join virtual Chalice Circles through a web interface. Most small group ministry gatherings will be held at the church in a room designed for small group meetings that has comfortable chairs and warm lighting.

The Spiritual Growth and Development Program will have a Development Committee made up of congregation members and staff who will re-energize the program with new, enriched, engaging curricula that incorporate music, social justice activities, activities on our land, and up-to-date technology. A member of the committee will oversee Adult Spiritual Growth and Development offerings that include an adult OWL program facilitated by our Interweave group. Adult Spiritual Growth and Development (SGD) programming will relate to the youth Spiritual Growth and Development curricula and the sermon themes for the year so that all generations will at times be discussing the same topics.

Music will be further integrated into congregational life as we move toward a full time music director.

2. Social Justice and Environmental Action

We live our beliefs by creating, sustaining, and enhancing programs that actively engage congregants of all ages in projects that promote peace, justice, and positive environmental action locally and beyond.

Over the next five years we will strengthen our congregation's involvement in social justice ministries by integrating our social justice projects with Spiritual Growth and Development, YRUU (Young Religious Unitarian Universalists youth group), 20s and 30s Group, Interweave, Chalice Circles and others.

We will increase awareness with Social Justice “moments” during services and congregation wide Days of Action. Our programs/ ministries will be coordinated under the guidance of a paid staff Coordinator for Social Justice and a strong Social Justice Council that does social justice strategic planning and oversees communications between our many projects. Youth and young adults may choose to take active roles in social justice projects and serve on the Social Justice Council.

Many members of our congregation already assume leadership roles in community based social justice projects and more will do so as we develop leadership skills and organization in our social justice ministry in the congregation.

Some of our programs/ ministries strive to play active roles outside the church walls. For example, our Interweave group strives to become LGBTQIA (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex and Allies) Social Justice Leaders in Michigan. Members of Interweave will be able to serve in leadership roles in faith coalitions, state and national organizations.

The Unitarian Universalist Church of Ann Arbor will serve as a shining example for others in the Unitarian Universalist Association and in Ann Arbor of commitment to renewable energy with continued projects including our solar panels and our wind turbine. We will strive to keep abreast of our building's ongoing maintenance to maximize sustainability.

Our larger numbers mean a larger voice for justice. As a large congregation we can move from facilitating individual awareness of issues to identifying areas for collective congregational action. We will be a strong voice for justice in our community.

By 2016 we plan to initiate an Annual Social Justice Conference.

3. Community

We create and foster community by providing an intentionally welcoming and safe environment where all feel valued and cared for, and where all are given opportunity to form meaningful connections with one another. We foster a climate of purposeful inclusion of all. We cherish the diversity of gender, age, race, ethnicity, national origin, range of abilities, sexual orientation, gender identity, financial means, education, and political perspective. We live together in peace, search for truth in love, and help one another.

Many of the program goals in this strategic plan are designed to enhance our connections with each other and to draw in new members who wish to join our active and supportive community.

There are program/ministry goals to strengthen our 20's and 30's group, re-kindle the campus ministry program, keep our connections with graduating high school students, provide transportation to seniors, and provide more pastoral support to young families. Men's circles and Women's programming have goals to assess needs and develop strong new programming.

One staffing goal is to hire a staff member with communications and technology skills to assist all programs/ministries. This staff person could help build community through new ways to communicate with one another and learn about the programs/ ministries of the congregation.

Database development offers new ways to track information about our membership, such as who is in the hospital, who wants to provide rides to church, and who can offer talents to a project.

Multi-generational all-church events, such as Founders Day will be planned. Members may increase connection to the community through attending weekly activity nights at church with a meal, classes, worship, and social time.

The Pastoral Care program, a program of ministry to each other, will expand to better serve seniors, young families and the increasing needs of a growing congregation.

A comprehensive volunteer coordination program will help each person to be welcomed into the community and guided to an activity or Chalice Circle or other programming that meets their needs and values their talents.

Enhancements to our outdoor areas will provide more opportunities for gathering, worshiping and gardening together.

Most programs/ ministries have included in their five year plans efforts to reach out to more people by providing child care and transportation for their activities.

4. Stewardship

We are all active stewards, serving our congregation and pursuing our ministries through prudent and creative use of our resources, whether physical, environmental, financial or human. We show respect and care for our beautiful building and grounds, for our staff, and for one another. We cultivate right relationships among Members of this congregation and with the wider world.

Our five year goals include many goals that lead us to better stewardship of our buildings and grounds, our staff and volunteers, our equipment and our finances.

A major strategic goal is to pay off our mortgage and redirect the money currently going to high interest payments to the staff and ministries that serve our vision.

Our goals to restructure our staff, increase ministerial support and develop job descriptions and personnel policies will help both staff and laity to cultivate right relationships with one another, to feel respected and valued for the work they contribute.

A governance goal asks our Board of Trustees to continually ask: who are we, who is our neighbor, what are we being called to do or become?

Continuing to fund the Leading with Love Program nurtures leadership within the congregation and provides better support for our growing number of programs/ministries.

A five year plan for developing our outdoor areas will improve our property while achieving some of our environmental and community building goals. We keep in mind that the land should be accessible to people of all physical abilities and we will continue to use the bounty of our land to share with others.

5. Culture

We are nourished by the culture that has evolved in this congregation throughout our rich liberal religious heritage in Ann Arbor, a culture rooted in our core belief in the inherent worth and dignity of every individual. We learn and grow from our differences. We value our connections, past, present and future, to the Unitarian Universalist world network.

Our Interweave group continues to make us proud of our status as a Welcoming Congregation. The Interweave group has plans to become social justice leaders in Michigan for LGBTQIA (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex and Allies) issues. They plan to facilitate adult Spiritual Growth and Development classes to share their learning with others in the congregation. And they will reach out to multi-faith coalitions to help spread the message beyond of our congregation.

Over the next five years we will develop more connections to our UU roots by expanding our Heartland District and UUA involvement: by providing scholarships to boost our GA attendance, by obtaining improved A-V equipment to support live streaming of district and national events to youth, seniors and others who may not be able to attend, and by funding participation in district leadership programs for youth and adults.

We have goals to bring attention to our congregation's history by providing space for our archives and making them available to congregants. And of course, we will be planning for the 2015 celebration of the 150 years since our congregation's founding.

Our international programs/ ministries have goals to expand the congregation's knowledge about our heritage and our partner church in Kézdivásárhely, Romania-- our connection to our historical religious roots in Transylvania. And goals to increase awareness of our Sponsor a Student program in the Khasi Hills of India, a historical connection for our Ann Arbor congregation. Our youth and adult SGD programs will include information on these international connections in their programming.

Congregants, leaders and staff must all work on embracing our challenge to think and act like the "Large Church" we have become.

C. INSTITUTIONAL ASPIRATIONS

Our programs/ministries require funding and institutional support to thrive and achieve their ambitious goals. Now that the our UUAA congregation has grown in membership and expanded our programming, we need to take major steps to professionalize our operations with a larger staff that has focused job descriptions for each staff member. The staff team needs to sustain excellence in existing programming, coordinate activities between programs, and create new forms of programming while the lay leaders continue to play vital roles in carrying out the ministries of the congregation.

Through effective management and planning, and generous stewardship by members, the budget of the UUAA can be brought in line with the aspirations of the congregation.

The senior minister needs to maintain a strong emphasis on vision and worship but must be equally successful at managing the performance of the programs/ministries of the congregation through careful coordination of the work of the staff team and the Board. With the support of the Board, the Senior Minister can create and sustain the performance management cycle of the congregation through goal setting, budgeting, performance review, and a coaching leadership style

Working with the Senior Minister on vision articulation, the Board will remain instrumental in creating policies and systems for managing performance, maintaining accountability, and continuing focus on strategic leadership and continuous strategic planning.

The role of the laity must be attended to with great care so that we all understand while paid program and administrative staff help support, organize and otherwise assist with all programs/ ministries, it is the lay members who bring the Core Values to life.

The Strategic Planning Task Force sees our Congregation moving boldly into a future of healthy administration and governance, where all ministries are thriving and fully funded, where each person in the congregation has a ministry. We see our Congregation as a place where all know the direction in which we want to move, where all are engaged in bending the arc of history toward justice. This can be a place where all know how to get things done, where all know what is going on and how to become involved, where we review our direction and progress toward our goals annually, where staff and volunteers work together in a beautiful, well-maintained building, where we bring to life our Core Values and thereby make a difference in the world.

Note: See [Appendix D - 2](#) for a description of ideal characteristics of a healthy institution.

III. FINDINGS OF OUR STRATEGIC PLANNING PROCESS

After listening to many congregants, staff members and lay program leaders, considering the five year goals of our many active programs and looking at the institutional needs of the congregation, the Strategic Planning Task Force condensed our findings to a single overarching challenge we need to address to effectively implement our plans and live our Core Values.

A. OUR UUAU CHALLENGE

The overarching challenge of the First Unitarian Universalist Church of Ann Arbor is to develop fully into a Large Church with all the engagement, excitement and impact on our world we know we have the potential to achieve. Our challenge is to become a large church in more than number of members. We have a vision of what we can be: a strong voice for love and justice in our congregation, our community and in the world.

To accomplish this, all areas in our congregation must shift, change and grow. We need to adopt the culture of a Large Church, embracing the differences we will experience and those we will make, capturing the energy of our members as we move forward in body and spirit to accomplish the Core Values/Ends we have set for ourselves. We need to sustain our members by providing spiritual nourishment and inspiration in a liberal religious home, moving our beliefs and values into action for social and environmental justice, nurturing and sustaining our congregational community in all its wonderful diversity, stewarding our human, physical and financial resources, remaining true to our liberal religious heritage even as we move boldly forward into the future.

We are now and have been for some time a large church in numbers. We have made some courageous decisions. As we outgrew our building at 1917 Washtenaw, we faced a decision point: to spin off a new congregation or to continue as one. We chose to remain one congregation and to secure a new building to accommodate our growing community. In 1996 we purchased 45 acres of land in Lodi Township, just outside the western city limits of Ann Arbor. We moved into the new sanctuary and office space in January, 2000. Soon after this we began the planning and construction of a large religious education wing containing classrooms and a larger chapel. We moved into this new building in November, 2004. Our Senior Minister Rev. Kenneth W. Phifer retired in 2005 after 25 years in our pulpit. Following 3 years of interim ministries, in 2008 we called the Rev. Gail R. Geisenhainer to our pulpit as Senior Minister and Chief Executive Officer. We continue on our journey to become an effective, active large church. We have not yet completed the transition to this status and stature. We lag behind in available resources and in organization.

Over the next five years, we will meet the challenge in all of the church's institutional areas discussed in [Section IV](#):

1. **Staffing**
2. **Governance**
3. **Facilities and Technology**
4. **Culture**
5. **Finance**

Addressing these five areas will strengthen the infrastructure that supports our ministries and enlarge our capacity to embrace additional growth as our congregation thrives. Recommended Actions to address these five challenge areas are presented in [Section IV](#).

B. GROWTH IN OUR CONGREGATION

Growth is implicit in the goals and objectives of all of our programs and ministries. We have already grown from what the Unitarian Universalist Association classifies as a "Program Church" to a "Large Church". We are now the largest Unitarian Universalist congregation in Michigan and one of the 35 largest Unitarian Universalist congregations in the U.S. We need to embrace and manage growth at First Unitarian Universalist Church of Ann Arbor. Some numbers to put this into perspective are shown below.

Measures of Congregational Growth from 2001-2011

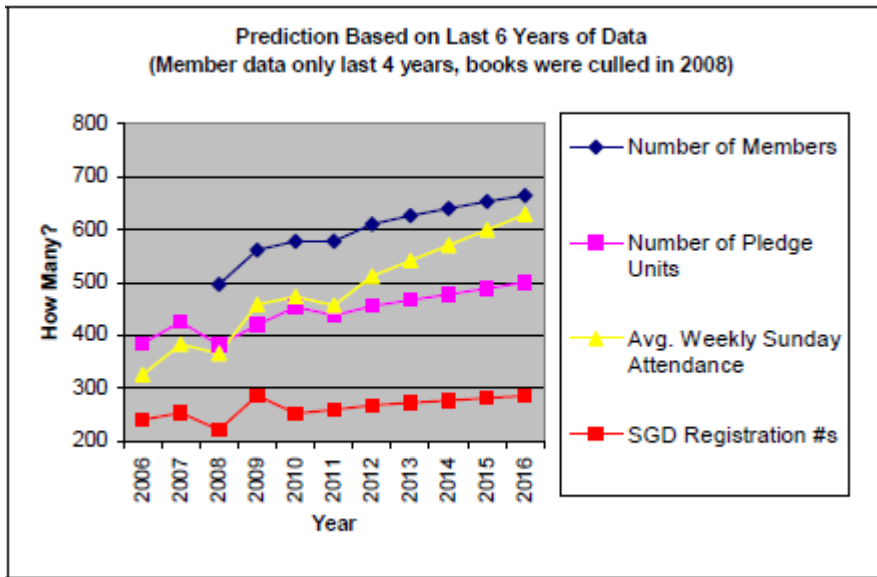
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Number of Members	642	663	716	737	766	724	742	496	561	578	578
Number of Pledge Units	410	430	440	440	425	384	425	381	419	453	437
Avg. Weekly Sunday Attendance						325	383	365	458	473	456
SGD Registration #s	240	240	250	250	240	240	253	221	286	252	259

Note: The membership book was culled in Feb of 2008. Service attendance prior to 2006 is not available.

Using trend analysis, this historical data can be used to growth over the five years covered by this strategic plan as shown in the tables below:

Predictions	Now	2012	2013	2014	2015	2016
Members=	578	610	626	640	653	664
Pledge Units=	437	455	466	477	488	499
Avg Sun Attendance=	456	512	541	570	599	628
SGD Reg=	259	268	272	277	281	285

Graphical representation of this data:



Strengthening our programs/ ministries and improving our staffing and organization could accelerate growth beyond the almost 700 members predicted above for 2016. All of our programs/ministries have goals and objectives that anticipate and welcome this growth. We need infrastructure to support the programs/ministries and to meet the needs of an increasingly larger congregation.

C. THEMES

As we gathered ideas, goals and objectives from program leaders, members of the congregation, and staff, four themes that cross all program areas emerged. These themes are all related to the overall theme of Growth: 1- The need to maintain connections, 2- The desire to enlarge our voice & extend our influence beyond our walls, 3- The need for more program integration and 4- The need for improved communications. We should attend to these themes as we implement the **action steps** found in Section IV of this document.

1. We need to work to **maintain and nurture connections and our sense of community** within our congregation. The Strategic Planning Task Force heard that some people want to feel more supported in their religious journeys and church experience and some people and programs/ministries would like to feel more connected to the congregation as a whole.

Our larger size makes it harder for individuals to get to know one another and to get involved in congregational events and projects. Many of the program/ministries goals address our need for closer connections through all-church social events, establishing new ways to reach out to seniors, young families, 20s& 30s, and more. These actions are a high priority as our congregation continues to grow.

2. We need to enlarge our **voice and actions in the larger world**, bringing our Unitarian Universalist message beyond our walls, providing hope and moving our region, our state, our nation and our world toward justice. A congregation of our size can and should have a larger voice. The task force was impressed to find that the Music program, Interweave Group and Chalice Circle program have goals to participate more widely in district and national events and become model programs for other congregations. The congregation needs to fully support these aspirations.

3. We need to **integrate our programs/ ministries** so that each can inspire and support the others. This theme was repeated by almost every program. The Spiritual Growth and Development program, the 20s&30s group and YRUU want to be a strong part of our Social Justice projects. Our Spiritual Growth and Development families would like integration between Sunday service topics and Spiritual Growth and Development topics so that we can have multi-generational discussions on common themes. Interweave has plans to provide adult Spiritual Growth and Development classes. The Pastoral Care Ministry has a goal to be a more visible part of all of our programs/ministries. Achieving integration of our programs/ministries requires that program leaders communicate and work well together.

4. We need to improve **communications** at all levels and in all directions: from program staff to program leaders and lay ministers/volunteers, from the Unitarian Universalist Church of Ann Arbor to the surrounding community, region and beyond. Needs include increased opportunity for staff members and lay leaders to meet and talk together, help with brochures and publicity.

We currently have a weekly bulletin, monthly newsletter, web site, Facebook page and many mailing lists. Even so, many members have told us that they feel they do not have ready access to the information they need. Several of the programs/ministries expressed concern that the congregation might not know about them or have information about their activities.

IV. RECOMMENDED ACTIONS

A. OVERVIEW

The actions described in this section directly address the Large Church Challenge as related to our institutional aspirations described in [Section II C](#). These steps will strengthen our capacity to serve and retain members who are attracted to our congregation by our liberal and broad-based theology, our inspirational and spiritually nourishing worship services, our excellent ministries for children, youth and adults, our strong movements in social justice within our walls and into the wider world.

A summary of the goals and objectives discussed in this section can be found in Appendix A, in the last Goals/Objectives table titled [Cross-Program UUAU Institutional Goals and Objectives](#).

B. ACTIONS- STAFFING

Goal

Provide a level of staffing sufficient and appropriately apportioned to bring the capacity of the institution in line with the number of members in order to support and sustain our programs/ ministries. The five-year goal is to increase the capacity of the institution in order to meet the needs of the present membership of nearly 600 adults and 300 children and to provide for anticipated future growth.

Discernment

These recommendations were provided based on four factors: first, the leverage provided to support the congregation's goal; second, the urgency of need; third, a realistic projection of our ability to fund positions; fourth, trying to achieve the goal of one program FTE per 100 people in church on Sunday, as recommended in the Alban Institute report.¹ Sequencing of adding new staff was done to try to match the gain in annual operating funds made available through the reduction in mortgage interest and principal as a result of a successful capital campaign.

¹At the request of the Board and Senior Minister/CEO, a Consultant from the Alban Institute analyzed staffing as part of an overview of the management and administration of the Congregation during the summer of 2011. A copy of the full report is available for review in the church office.

How the Task Force Made Decisions about Staffing Recommendations

The Task Force gave priority to increasing the productivity and impact of our senior program staff. By relieving them of duties which can be delegated to others, they will be able to focus their time and attention on their core areas of responsibility.

Leverage: The Board requested that in scheduling the staging of recommendations we attend to the leverage provided by each change and give priority to those which provide immediate benefit to the widest segment of the Congregation.

The Task Force wrestled with the ambiguity which arises out of our transition to fully embrace policy-based governance.

Recommended Changes in Staffing

1. Administrative support for the Senior Minister

Statement of Need

Because of insufficient administrative support, the Senior Minister/CEO is spending too much time on administrative and clerical tasks which could be done by someone without a minister's training and expertise. Providing administrative support would have an immediate positive impact on the functioning of the church as a whole, as the Senior Minister would have more time to supervise, train, and support staff, and to continue to meet the needs of the members of the congregation – including support, guidance, and inspiration. In addition, this would allow the Senior Minister to become a voice for social justice in the larger community.

Of all recommendations in this report, providing administrative support to the Senior Minister would provide the greatest amount of leverage immediately, because it would allow her to sustain the initiatives of congregants in the areas of programs. Such support was recommended in a staffing analysis in 2007, recommended by the Alban Institute consultant in 2011 and is an urgent recommendation by the Strategic Planning Task Force in December 2011.

Recommended Action: Provide administrative support to the Senior Minister
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2. Program coordination including communications and technology expertise

Statement of Need

Communication becomes more challenging as the size and complexity of the organization increases. As we strive to retain our members, we must make certain that we do everything possible to engage them in the ministries of the congregation, and help them feel anchored in their religious home. The success of these efforts requires timely access to information in multiple, friendly formats. Many programs/ ministries have requested the establishment of a paid staff position to coordinate and assist with communications including but not limited to web site maintenance and publicity in

print and electronic forms, skills with social media and mailing lists, facilitating conversations across programs/ ministries and help with press releases for community wide activities .

On the administrative side, there is currently effective vertical administrative leadership for Pastoral Care, Men's Programming, Spiritual Growth and Development (SGD), Interweave and Chalice Circles. However, there is a lack of mid-level, coordinator positions in other areas, leaving some programs/ ministries with little oversight and support. For example, the Associate Minister has over 20 "direct reports", 5 of the areas have leaders/ coordinators, 4 ministries do not: Multigenerational, Women's Programming, Recreation, and Identity Groups, which have more than 15 groups. This gap in the administrative chain needs to be closed. There also appears to be a lack of standard structures or processes for programs/ ministries reporting to ministers and program staff to communicate and coordinate across program areas. With our growing number of programs/ ministries, there is a need to establish a common set of administrative processes for communicating, meeting with management, making decisions, coordinating, planning, solving problems, evaluating, etc. Standard processes allows volunteer staff to reduce the time it takes to get up to speed when they move to take over new assignments. These processes can be taught in the leadership development program.

<p>Recommended Action: Establish a new Programs Coordinator position to oversee communications, technology, and program coordination.</p>
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3. *Spiritual Growth and Development*

Statement of Need

Spiritual Growth and Development is a key ministry of the Congregation, drawing many new members and clearly bringing to life our Core Values/Ends as we nurture and equip new generations for the task of moving our world toward justice. This program/ministry provides services to all ages, cradle to grave. In recent times, classes for adults have waned, but there is clearly interest and need for this type of programming within the framework of Spiritual Growth and Development. We need to continue to assess, support and strengthen the development of this critical ministry, providing the resources to develop the program and to train and support volunteers. We need to provide administrative support to the SGD program, e.g., to collect and maintain data and provide sufficient support to staff so that they can think creatively about developing the program and about using the extensive volunteer resources available in the congregation. We will maintain the position of youth advisor, which has demonstrated its value in retaining youth through their busy high school years.

<p>Recommended Action: Increase Spiritual Growth and Development (SGD) staffing levels. Focus the effort of the Programs Coordinator on this area initially to maximize benefit to this high leverage program.</p>

4. *Social Justice Coordinator*

Statement of Need

There is high engagement and energy of the congregation in the area of social justice; this engagement and energy would benefit from greater coordination and focus. Our Alban Institute consultant notes that in a large congregation, the degree of complexity exceeds the time and energy that lay leaders can provide. A social justice coordinator will help the congregation focus its energies or bundle certain programs and projects, and with the Senior Minister provide a voice in the outside community. As a paid program staff member, the social justice coordinator will provide continuous, sustained effort as well as year-to-year continuity, resulting in greater efficiency and effectiveness for the effort made. This position will provide a point of connection with the Spiritual Growth and Development Program, allowing greater involvement of children and youth in the congregation's social justice ministry.

Recommended Action: Establish a position of Social Justice Coordinator.

5. *Music Director*

Statement of Need

The music program plays a critical role in the spiritual experience of worship services. As the number of worship services increases to meet the needs of a larger and increasingly diverse congregation, we need a full time music director. In addition, with a full time music director, this large congregation can benefit from and support a variety of music groups, providing both participatory and performance musical experiences.

Recommended Action: Increase the appointment of the Music Director.

6. *Additional Recommendations arising from the Report of the Alban Institute Consultant and the work of the Board of Trustees and the Senior Minister/CEO toward policy-based Governance*

Statement of Need

Within the framework of policy-based governance, the Senior Minister/CEO may nimbly adjust staff positions as needs change, such as growth in the number of people attending services and activities on Sundays or as needs become evident such as a lack of continuity in fund-raising efforts.

Recommendations

- The Task Force fully supports the CEO in implementing the recommendations of the Alban Institute consultant.

- The Task Force supports the establishment of a position for a Development Coordinator.
- The Task Force recognizes the potential need to re-configure and/or add administrative/office staff or adjust other FTEs as conditions within the congregation change, as in substantial growth or other factors.

Yearly Objectives

Year 1 (2011-2012): Hire full time Executive Assistant as support for the Senior Minister. Create a new position of Program Ministries Coordinator, who will also have expertise in communications and technology. Hire part-time (25%) Social Justice Coordinator. Reconfigure the office staff per the Alban report, at the discretion of the CEO. Hire a Development Coordinator (25%), at the discretion of the Senior Minister/CEO.

Year 2 (2012-2013): Increase the Social Justice coordinator to 50%. Hire a coordinator for Campus and Young Adult Ministry (25%).

Year 3 (2013-2014): Increase the staffing levels in Spiritual Growth and Development in line with growth in numbers in the program. Increase the Social Justice coordinator to 75%. Increase the Music Director to 75%. Increase the Welcoming Ministry Coordinator to 75% as the number of weekly worship services increases.

Year 4 (2014-2015): Increase the appointment of the Social Justice Coordinator to 100%. Increase the appointment of the Music Director to 100%.

Year 5 (2015-2016): Increase the appointment of the Pastoral Care Coordinator from 30% to 50%.

Providing Adequate Program Staff

According to the Alban Institute consultant, in order to adequately support programs, a congregation should have 1.0 FTE of program staff per 100 people present in the building on Sundays. A larger program-support capacity allows for program growth.

The table below (IV-B-1) shows the recommendations for changes in Program Staffing and the recommended sequence of the additions. The columns show recommended levels of program staffing at UUAA from 2011 (Current) through 2016 (Year 5), expressed as a percentage of full time for each program staff position. Also shown are the annual increases and total **program** FTEs. Projected levels of Sunday attendance are shown for reference.

Table IV-B-1: Recommended Program Staff - by Program Year

Position	Current- December 2011	Year 1 2011- 2012	Year 2 2012- 2013	Year 3 2013- 2014	Year 4 2014- 2015	Year 5 2015- 2016
Senior Minister/CEO ¹	50%	50%	50%	50%	50%	50%
Associate Minister (Care & Community)	100%	100%	100%	100%	100%	100%
SGD Director	75%	75%	75%	100%	100%	100%
Programs Coordinator ²	0	100%	100%	100%	100%	100%
Social Justice Coordinator	0	25%	50%	75%	100%	100%
Music Director	50%	50%	50%	75%	100%	100%
Welcome Ministries	50%	50%	50%	75%	75%	75%
Campus & Young Adults	0	0	25%	25%	25%	25%
Youth Ministry	25%	25%	25%	25%	25%	25%
Pastoral Care Coordinator	30%	30%	30%	30%	30%	50%
New Program Staff FTEs	0	1.25	0.50	1.00	0.50	0.2
Total Program Staff FTEs	3.8	5.05	5.55	6.55	7.05	7.25
<i>Projected Sunday Attendance³</i>	<i>456</i>	<i>512</i>	<i>541</i>	<i>570</i>	<i>599</i>	<i>628</i>

¹ The Senior Minister/SENIOR MINISTER/CEO devotes half time to Programs, half time to administration, supervision and governance.

² This is a position created in the current program year. This position includes elements of a Communications Coordinator for Programs/ Ministries and for Programs Coordinator.

³ See [Section III.B](#) for more details on projected Sunday attendance.

The table on the following page gives an overview of **all** recommended staffing for the next 5 years. The gray shaded positions are existing positions which have not been selected to expand to additional hours. New positions are noted. All salaries over the five years are assumed to increase by 2% per year.

Table IV-B-2: Recommended Staffing Changes - Sequencing and Costs

Ministers	%Time	Full time \$	12/2011	Year 1	Year 2	Year 3	Year 4	Year 5
Senior Minister	.5	115,000	57,500	58,650	59,823	61,019	62,240	63,485
Associate Minister	1	65,650	65,650	66,963	68,302	69,668	71,062	72,483
<i>*Summer Preacher</i>	PT	-	-	3,200	3,200	3,200	3,200	3,200
Music Staff								
Music Director	.5 to 1	59,297	29,649	30,242	30,846	47,195	64,185	65,469
Accompanist	PT	-	10,433	10,433	10,433	10,433	10,433	10,433
Children's Music Director	PT	-	2,500	2,500	2,500	2,500	2,500	2,500
SGD Staff								
SGD Director	.75 to 1	52,000	39,000	39,780	40,576	55,183	56,286	57,412
YRUU Advisor	.25	28,000	7,000	7,140	7,283	7,428	7,577	7,729
Preschool Teacher	PT	-	2,986	2,986	2,986	2,986	2,986	2,986
Nursery Teacher	PT	-	2,586	2,586	2,586	2,586	2,586	2,586
SGD Asst	.5	31,200	15,600	15,600	15,912	16,230	16,555	16,886
Program Staff								
Pastoral Care Coordinator	.3 to .5	31,600	9,480	9,670	9,863	10,060	10,261	17,444
Welcome Ministry Coordinator	.5 to .75	41,600	20,800	21,320	21,640	33,110	33,772	34,447
Child & Nursery Care Workers	PT	-	3,500	3,500	3,500	3,500	3,500	3,500
<i>*Programs Coordinator</i>	1	35,000	-	35,000	35,700	36,414	37,142	37,885
<i>*Social Justice Coordinator</i>	.25 to 1	35,000	-	8,750	17,850	27,311	37,142	37,885
<i>*Campus & Young Adult Coord</i>	.25	28,000	-	-	7,000	7,140	7,283	7,428
Admin Staff								
Senior Minister	.5	115,000	57,500	58,650	59,823	61,019	62,240	63,485
Executive Director	1	64,476	64,476	65,766	67,081	68,422	69,791	71,187
Custodian	.63	24,050	24,050	24,531	25,022	25,522	26,032	26,553
Evening Building Attendant	PT	\$15/hr	15,600	15,600	15,600	15,600	15,600	15,600
Weekend Building Attendant	PT	\$14.50/hr	13,050	13,050	13,050	13,050	13,050	13,050
Office Administrator	1	35,000	35,000	35,000	35,700	36,414	37,142	37,885
<i>*DevelopmentCoord</i>	.25	35,000	-	8,750	8,925	9,104	9,286	9,471
<i>*Exec Asst to Senior Minister</i>	1	31,200	-	31,200	31,824	32,460	33,110	33,772
Total Program Staff FTEs (not PTs)			4.30	5.55	6.05	7.05	7.55	7.75
Total Admin Staff FTEs (not PTs)			3.13	4.38	4.38	4.38	4.38	4.38
TOTAL Salaries			476,360	570,866	597,025	657,556	694,961	714,761
Est Benefits (~41%)			195,307	234,055	244,780	269,598	284,934	293,052
TOTAL COSTS			671,667	804,921	841,805	927,153	979,896	1,007,814

C. ACTIONS- GOVERNANCE

The Board of Trustees and the Staff of FIRST UNITARIAN UNIVERSALIST CONGREGATION OF ANN ARBOR (UUAA) can help our congregation in achieving its potential as a large congregation that brings its values alive to its members, the larger community and the world through good governance and wise planning. They can ensure that our resources are aligned with our aspirations and they can maintain ongoing consideration of fundamental strategic questions.

Goals

- 1- Develop a plan for ongoing strategic planning, including an annual cycle of strategic initiative review and prioritization, communication of strategic plans to the congregation and scheduling regular Board conversations about fundamental strategic questions. Ensure that the Unitarian Universalist Church of Ann Arbor's resources are aligned with our strategic goals.**
- 2- Continue to transition to policy-based governance.**

Statement of Need

The Board of Trustees has guided the Congregation well through a time of great transitions and into a new form of governance we call "policy-based governance". This structure provides greater freedom and greater control to paid staff, under the guidance of a CEO who in our congregation is also the Senior Minister. We are still in a period of transition. We all, the Board of Trustees in particular, need to nurture and support congregational governance structures and processes to meet the needs of a large church. The Board of Trustees needs to engage in strategic and deliberative review and discernment in how congregational policies are developed and implemented, including strategic reviews of our use of policy-based governance principles. The Congregation needs the leadership of the Board of Trustees, working with the Senior Minister/CEO to focus the vision and direction of the Congregation as we grow into our new status as a Large Church. The Congregation needs the Board to offer effective leadership with the Senior Minister/CEO to ensure the congregation secures adequate resources and that we are effectively using our resources for the ministries of our congregation.

Recommended Actions

- Set **priorities for strategic planning**, based on the work of the Strategic Planning Task Force, that focuses the energy of the Congregation and guides its budget priorities and staffing decisions.
- Develop an **annual cycle to monitor progress of strategic initiatives** and report progress to the Congregation.
- Unify **processes that Ministries/Programs use to implement their program objectives**. (See [Appendix A](#))
- Ensure a **long-range staffing plan** and budget in support of the strategic initiatives.

- Support the laity in understanding of the Core Values of the Unitarian Universalist Church of Ann Arbor, the narrative of the strategic plan, and the Unitarian Universalist Church of Ann Arbor 's potential as a large church. Help members to understand and "to live into their roles as discerners, owners, governors and ministers" through dialogue and the development of lay leadership.
- Regularly reflect on and monitor the effectiveness of the Board and its collaboration with the staff team as we develop in our capacity for policy governance. The Board's review will include clarifying where we stand along three continuums: more involvement vs. less involvement; over-control vs. under-control; and past vs. future focus. Continue the development of Board policies in the area of discernment, strategy, and oversight including program and staff evaluation, as discussed by Susan Beaumont in the Alban Report, p. (22)
- Allocate time for ongoing conversations and work around fundamental strategic questions such as: who are we, who is our neighbor, what are we being called to do or become?

Yearly Objectives

Year 1 (2011-2012): Strategic planning; Stewardship; Staffing Plan

Year 2 (2012-2013): Monitor strategic progress; develop annual objectives for Board with Congregation

Year 3 (2013-2014): Monitor strategic progress; evaluate progress toward previous annual objectives; develop new objectives for Board with Congregation

Year 4 (2014-2015): Monitor strategic progress; evaluate progress toward previous annual objectives; develop new objectives for Board with Congregation

Year 5 (2015-2016): Monitor strategic progress; evaluate progress toward previous annual objectives; develop new objectives for Board with Congregation

D. ACTIONS- FACILITIES AND TECHNOLOGY

Goal

As good stewards of our resources, we need to use our land, buildings and technology effectively while implementing our program goals.

This goal requires aligned actions between several groups to move from our current state toward expected growth levels over the next five years. A balance should be sought between taking care of

current responsibilities (maintenance, debt payments, etc), and preparing the way for those who come after us (saving, planning, “digging the wells”, etc).

When people get together, they need a space. UUAA currently has Indoor and Outdoor spaces available that can support expected growth for the next 5 years, however regular maintenance is needed and enhancements are requested for many of our programs/ ministries.

In addition to space, getting people together also requires communication and transportation. Communication technologies enable sharing of information and coordination of activities. Transportation technologies enable people to move between locations when activities occur. Providing easy-to-use communication and transportation options contribute to increased participation in activities and programs/ ministries that are important to the congregation.

Technology – Enable Communication and Transportation

1. Technology Team

Statement of Need

The congregation has endeavored to meet the needs of staff and to update our technology as we are able. Additions and enhancements have been single episode reactions to needs as they have arisen without a proactive plan.

Recommended Action Establish a Technology Team to assess, coordinate, plan and oversee this area.
--

2. Congregational Database Software Modules

Statement of Need

Our current database configuration does not meet the needs for tracking members, programs/ministries and participation. It is not accessible remotely, thus hampering maximum efficiency of our staff.

Recommended Action Update Congregational Database software to enable remote access and add modules that provide additional information tracking/analysis abilities

3. Update Computer Hardware and Software

Statement of Need

Computer hardware is adequate, but there is no reserve in our system to accommodate recommended additional staff (see Staffing Actions for needs).

Recommended Action Add / Upgrade computer hardware & software as needed .
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4. Improved Audio System

Statement of Need

Recent improvement to the acoustics in the Phifer Sanctuary and in the Jackson Chapel have been effective in improving participation in worship services and meetings conducted in these spaces, but the audio equipment that was part of the original construction is in need of repair or replacement of critical parts.

Recommended Action: Add new Audio-Visual systems with improved “auxiliary” audio (for hard of hearing). Keep in mind that later need to add multi-media capabilities.

5. Audio-Visual / Multimedia System

Statement of Need

The Congregation lacks the ability to use visual media during worship services, meetings and other gatherings in the Phifer Sanctuary and Jackson Chapel. In the original construction, no arrangements were made to control day light or allow for projection of images in these spaces. At the present time, this need is acutely felt as best worship and meeting practices include the use of multiple media. In addition, there is need for media in SGD classes and for auxiliary audio equipment in the Jackson Chapel to allow full participation by those whose hearing may be impaired.

Recommended Action: Upgrade technology for projection of multimedia in Spiritual Growth and Development (SGD) classrooms, Phifer Sanctuary and Jackson Chapel, including window/daylight shading

6. Video Streaming / conferencing/ recording equipment

Statement of Need

We are excited by the desire for greater involvement in the Heartland District and in the UUA with greater interest in the UUA General Assemblies. We have not been able to participate remotely despite our desire to do so, as we lack technical capacity for streaming: sending and receiving.

Recommended Action: Enable video streaming / conferencing with audio & video recording capability to (a) receive & project external events like UU General Assembly, and (b) to transmit internal events, for example live-stream a music festival to the web for others to see who cannot attend in person. Recording equipment should be available to capture audio and/or video so they can be made available on websites, DVD's, etc. Implement the already present capacity for sermons to be available on the congregation's web site.

7. Transportation Plan

Statement of Need

There is no public transportation to our site. Members are aging and growth into areas surrounding the immediate community has uncovered a need to provide transportation beyond one-on-one, individually arranged rides.

Recommended Action: Analyze/survey the needs of the congregation and develop a Transportation plan to improve transport options (carpooling, ridesharing, carsharing (Zipcar), purchase/lease a van, etc) Options should be considered and evaluated for implementation including leveraging the database to share information for coordinating carpooling / ridesharing. Other options to consider include purchasing/leasing a handicapped equipped van.

Building – Climate Controlled Space to Gather

8. Deferred Maintenance

Statement of Need

Maintenance of our beautiful building (painting, dry wall repair, for example) has been deferred in recent years due to operating budget constraints and on-going mortgage payments. We must sustain our physical plant, for to neglect this new space would be unwise and would squander the investment we have made in our building. We have attained status of a Green Congregation and can now take advantages of increased efficiencies that have developed in the industry.

Recommended Action: Perform deferred maintenance and/or identified energy efficiencies (add insulation) Deferred maintenance should be prioritized and performed (drywall, paint, etc). This should include a review of energy efficiency options that may not have been implemented yet (insulation, etc.)

9. Staff Offices and Meeting Space

Statement of Need

As we add staff to increase the capacity to sustain our ever larger congregation, we have filled unused office spaces and are now unable to provide work space to new staff. As successful programs in small group ministry (Chalice Circles) and in Pastoral Care have developed, we have noted the need for gathering spaces which are warmer, more comfortable, less formal and “meeting-like” for optimum functioning of these important and successful programs/ministries.

Recommended Action: Create a comfortable space (with appropriate furnishings) that could be used for Pastoral Care, Chalice Circles, etc. Staff offices and meeting space should be reconfigured to support the increased staffing needs.

Land – Environment – Places for Plants & Animals, Humans & Machines

10. Parking Lot

Statement of Need

The parking lot is in need of repair and at minimum needs patching, but should be considered for full refurbishment. This is becoming a safety issue, especially during winter as areas may become icy if snow removal is hindered.

Recommended Action: Refurbish parking lot and (Ann Arbor Saline Road) entrance. A permeable pavement option should be evaluated (for cost, environmental impact and long-term durability). This should also include a review of entry-way improvements to both improve visual “curb appeal” aesthetics and to provide safer entrance/exit to the facility

11. Outdoor Gathering and Worship Areas

Statement of Need

Outdoor gathering areas exist and are underused. They can be improved for greater use by attending to access, sun shading and audio capability.

Recommended Action: Improve outdoor gathering areas (beginning with the area outside the social hall) and the access trails to the outdoor worship area. The area outside the social hall should be enlarged and improved for more gathering space and the outside worship area needs to be improved to enable outdoor services.

12. Garden Space

Statement of Need

Garden space is in use for aesthetic and food production (shared through local food banks), but space to keep tools and equipment and protect our investment in these items is lacking.

Recommended Action: Include needs assessment for storage in site plan work.

13. Site Plan

Statement of Need

We have fulfilled the objectives of our most recent site plan; there is no overarching plan to guide new activities on the land.

Recommended Action Update and maintain a Master Site Plan. The Master Site Plan is currently undergoing updates that will provide more details and project dependencies. This updated Site Plan (expected first quarter 2012) should be regularly reviewed, updated and communicated. Priorities need to be reconciled with the recommendations of this strategic plan.

Table IV-D-1 Estimated costs for Facilities and Technology Recommended Actions- by year.

Action	2011-12	2012-13	2013-14	2014-15	2015-16
Database update	\$3,000				
Computer hardware & software	\$2,000	\$5,000			
Tech Team - assess A/V options		\$1,000			
Audio-Visual (Multimedia) systems		\$3,000	\$40,000	\$25,000	\$25,000
2-way video streaming / conferencing			\$5,000		
Transportation Plan					
Deferred maintenance	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Expanded staff offices and meeting space			\$15,000		
Furnishing updates		\$5,000			
Master Site Plan					
Refurbish parking lot and entrance				\$300,000	
Improve outdoor worship area and trails			\$20,000		
TOTAL	\$15,000	\$24,000	\$90,000	\$335,000	\$35,000

E. ACTIONS- CULTURE

Culture is our learned world-view, including the values, principles, and standards that we use and are acceptable in our community. The essence of culture is not only what is visible on the surface, it is the shared ways in which we understand and interpret the world, our shared system of meanings. It dictates what we pay attention to, how we act, and what we value. The explicit description of our Unitarian Universalist Church of Ann Arbor culture is contained and rehearsed in our Unitarian Universalist Guiding Principles, our Unitarian Universalist Church of Ann Arbor Core Values Statements, and in our covenants, for example the covenant that we read together in our services.

The spirit of this congregation is love, and service is its law.

This is our covenant with each other:

to dwell together in peace,

to search for truth in love,

and to help one another.

As we begin to make changes to create the structures, processes and capacities to support truly being the large church that we have become, the board and ministers need to plan explicitly how to improve our member's understanding of large congregations, what benefits they confer and how membership roles change with growth in size. They need to manage member's expectations as progress occurs. This will require us to address the anti-hierarchical attitude of members. (We recommend *Inside the Large Congregation* by Susan Beaumont as a source for information on this topic.)

Goal

By 2015 our staff and members will have a good understanding of large congregations and embrace the benefits a larger size confers. Staff and members will understand their roles in a larger, more structured institution.

Statement of Need

The Strategic Planning Task Force has observed that our covenant above is lived out in our congregational life. How we conduct our one on one relationships with each other within the Congregation very much aligns with our aspirations. However, with respect to how each member and groups of members relate to the organization as whole, we do have something to learn and areas of growth opportunity. Although our congregation has grown in size to "Large Church" status, we have not moved wholly to large congregation thinking and practices. Most members are comfortable in a large and growing congregation, but unsure of how to find their role in the congregation, how to see themselves as involved in a ministries of the congregation. Some members still feel a sense of loss regarding how the congregation has grown and changed in recent years. Those who feel lost or uncomfortable in a "Large Church" and all who feel uncertain about how to make their way within this increasingly complex system need some guidance. Adjusting our congregational culture to one of a Large Church is required. The Board of Trustees and the Senior Minister/CEO have shown great

wisdom and courage in seeking outside guidance from the Alban Institute and now have a set of challenges ahead.

Recommended Actions

Board of Trustees: Clarify divisions between staff/ membership roles in the programs/ ministries of the congregation. The dialog should "focus on the role of laity as discerners, owners, governors and ministers".

Board of Trustees and Senior Minister/CEO: Identify and implement ways for our members to move to Large Church thinking and practice.

Find our greater voice: Speak out through our Senior Minister/CEO and our program outreach activities in the community, state, UU District, and Nation.

Board of Trustees and Senior Minister/CEO: Find ways to build capacity in the Congregation to accept and work with the type of structure of authority and accountability required by a Large Church while maintaining our commitment to the democratic process.

Board of Trustees and Senior Minister /CEO: Work together with the members of the Congregation to continue to build a culture of Abundance and Generosity so that we have the means to bring our Core Values to life.

Board of Trustees and Senior Minister: Find ways to empower members individually and collectively to each find their own place, their own ministry in our work/ goals/ endeavors.

Yearly Objectives

Year 1 (2011-2012): Develop a plan for addressing the cultural challenges of the Recommended Strategic Actions

Year 2 (2012-2013): Align processes and educate all levels of the organization, members through top leadership

Year 3 (2013-2014): Assess effectiveness of efforts and continue to support cultural change

Year 4 (2014-2015): **Celebrate the 150th anniversary of the founding of the First Unitarian Universalist Congregation of Ann Arbor**

Year 5 (2015-2016): Assess

Goal

Secure funding to implement the priorities identified in the strategic plan by reducing our mortgage debt through a capital campaign and by increasing our income through annual pledges, growth in membership, continued planned giving, and other fundraising. These monies (currently paying interest on the mortgage debt) will be redirected toward implementation of the Strategic Plan Recommendations.

Statement of Need

The Congregation generously supports the Operating Budget of the church, including a daunting monthly mortgage interest payment of \$14,000. The Strategic Planning Task Force believes that this money would be better spent on programs and ministries that will bring the Congregation's Vision to Life, as expressed in the Core Values Statements.

Recommended Actions

- Board of Trustees approves three-year capital campaign in 2012.
- Board of Trustees monitors the progress of the capital campaign.
- Board of Trustees and SENIOR MINISTER/CEO continue to develop annual operating budgets and monthly monitoring of the congregation's finances.
- Board of Trustees and SENIOR MINISTER/CEO develop a year-round stewardship committee that educates the congregation and integrates all of the stewardship activities of the congregation with the assistance of a Development Coordinator.
- The Board of Trustees and the SENIOR MINISTER/CEO and the congregation need to secure adequate financial resources to fully fund the congregation's aspirations and the recommended actions of this strategic plan.
- The Board of Trustees, the ministers, staff and the congregational leadership need to nurture a culture of abundance and a spirit of generosity among the members of our congregation.
- All members and staff need to ensure that we align our aspirations with our ability to fund them and to ensure that we are effective stewards of our financial resources

Yearly Objectives

Year 1 (2011-2012): Launch Capital Campaign; Stewardship Planning; Budget Planning / Monitoring.

Year 2 (2012-2013): Monitor Capital Campaign; Year-round Stewardship Plan; Budget Planning / Monitoring.

Year 3 (2013-2014): Monitor Capital Campaign; Review Year-round Stewardship Plan; Budget Planning / Monitoring.

Year 4 (2014-2015): Conclude Capital Campaign; On-going Budget Planning and Monitoring; On-going continuous stewardship cycle.

Year 5 (2015-2016): On-going Budget Planning and Monitoring; On-going continuous stewardship cycle; Evaluate effectiveness of Changes in Finance.

V. EVALUATION AND FUTURE PLANNING

The Board of Trustees represents the Congregation, its interests, aspirations and concerns, and provides the Senior Minister/CEO with annual objectives and resources to achieve them within the framework of our core values and this five-year strategic plan. We recommend that at the end of each program year, the Board request that the Senior Minister/CEO obtain an evaluation and list of the year's expenses from each program. This would expand on the current annual reports that are written in May. The Senior Minister/CEO can then prepare a Congregation-wide report that includes the progress on our goals achieved during the program year. This report should include reports from all program/ministry areas as well as a report of the progress on congregation-wide goals (institutional goals) for staffing, governance, facilities & technology, culture and finance.

The Senior Minister/CEO should also direct the programs/ministries to prepare a planning document that with their modifications to their objectives, their expectations of what they will achieve in the coming year and the resources required to achieve them. These planning documents can then be consolidated for Board deliberation. We recommend that the planning, implementation, evaluation sequence for each year use the annual objectives and 5 year goals as the basis and that the sequence start at the end of 2011- 2012 program year.

Reports should be made available to the congregation in a way that reinforces congregational ownership of our goals and directions.

A new strategic plan should be started in the third year (2014).

As a final thought, we note that this plan has been developed through extensive listening to all in the congregation who chose to participate. We believe that while the Board of Trustees and the Senior Minister/CEO are accountable for the implementation of the Recommended Actions, **it is the Congregation of First Unitarian Universalist Church of Ann Arbor who owns this plan. It is the responsibility of all of us to participate in meeting the challenges. It is the Congregation who will do the work of ministries and fund them. It is the Congregation who will make our Core Values come alive, and bend the arc of history toward justice.**

APPENDIX A. PROGRAM 5 YEAR GOALS AND OBJECTIVES

The FIRST UNITARIAN UNIVERSALIST CONGREGATION OF ANN ARBOR (UUAA) as a whole and the program areas within it have goals and objectives to guide their operations. The Strategic Planning Task Force worked with program leaders to facilitate identifying the primary program goals and objectives for each individual program for 2011-2016. While all of the program goals were used by the task force to describe our aspirations and arrive at recommendations, not all of these goals are reflected in the main text of the strategic plan. The full set of goals are provided in this appendix, both for review and to help programs/ ministries monitor their progress and build on these goals in their future planning. Each program also has a more detailed document with additional information such as measures for the goals.

ORDER OF PROGRAMS/ MINISTRIES INCLUDED IN THIS APPENDIX

1. [20s & 30s Programming](#)
2. [Campus Ministries](#)
3. [Chalice Circles](#)
4. [Denominational Connections](#)
5. [Interweave](#)
6. [Land and Outdoors](#)
7. [Leadership Development](#)
8. [Men's Programming](#)
9. Music Program
10. [Partner Church](#)
11. [Pastoral Care](#)
12. [Social Justice](#)
13. [Spiritual Growth and Development - Adult](#)
14. [Spiritual Growth and Development - Youth](#)
15. [Spiritual Growth and Development - YRUU](#)
16. [Welcome Ministries](#)
17. [Women's Programming](#)
18. [Worship](#)
19. [Cross-Program UUAA Institutional Goals and Objectives](#)

Program/Ministry: 20s / 30s PROGRAMMING

Program Leaders: Mark Evens (ministerial), Allison Herz, Isabella Weber & Carl Miller (volunteers)

Vision for 2016

The 20's and 30's Group has been identified by the congregation as one of the main identity groups important to serve and important for congregational health. Regular 20s/30s events are being held which focus on this demographic twice quarterly. These events have increased the overall congregational attendance of this age group to something close to the local percentage of the population (15-18%). 20s/30s events are organized by a volunteer leadership group, supported by church staff. The staff has recognized the need to provide oversight and the particular needs of this group, such as child care for their events. Staff administration of all age dependant planning is supported by the collection of age information on all congregants. Participation in church activities is tracked according to age as part of a larger concern for tracking multi-generational church involvement. The 20s/30s age group is kept informed and connected by the increased use of web, email, and social networking tools.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- By 2015, 15% of the adults in the congregation take part in monthly 20's and 30's events.	Year 1 1-Organize a leadership event with interested 20s and 30s and staff / lay leaders skilled in creating a leadership structure / planning team for the group (examples from: Interweave, Mens Groups). 2-Hold a planning team meeting or retreat to plan quarterly events.	Staff time, volunteer time (group structuring skills); Meeting space	Advertising? Refreshments, child care for events.
	Year 2 1-Regular leadership meeting(s), including at	Staff time (10-15 staff hours); Meeting space for events;	Food/beverages for events Child care for events

	<p>least yearly planning meetings.</p> <p>2- Expand to two events quarterly.</p> <p>3- Staff collects age information on congregants. Tracks participation in database.</p>	Child care space for events	Database tools and equipment for collecting information (general need of church - ~\$3000)
	<p>Year 3-5</p> <p>Continue to evaluate and expand on above...</p> <p>1-Evaluation of database information on age ranges participating in events.</p>		<p>Increase in food/beverages for events;</p> <p>Increased needs for meeting space for events;</p> <p>Increased need for child care for events;</p>

Program/Ministry:

CAMPUS MINISTRY

Program Leaders:

Mark Evens (ministerial)

Vision for 2016

By 2016, our Campus Ministry outreach program is not only attracting local college age UUs to our programming, but also maintaining contact with YRUU members who have graduated from high school and gone to colleges or jobs out of the area. Campus Ministry receives dedicated staff time from our ministry and has a strong lay leadership team that includes students from the U of M and EMU as well as non-students in the 18-24 year old age group. We hold quarterly events especially for this age group. At least one of the events each year is held during typical vacation time for college students so that former YRUU members who are in town for holidays can attend. We keep in touch with our graduates from YRUU via email, social media and a Campus Ministry blog site. A quarterly newsletter keeps both our local and out of state youth informed and invites all to take part in social justice projects and other UUAA congregational programs/ ministries.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Reach out to the 18-24 age group. Sponsor quarterly events for the 18-24 year old age group (UM, EMU and others including some not attending college).	Year 1 1-Identify volunteers explore recruitment channels for UM, EMU and other ways to contact 18-24 year olds. 2- Hold an event and recruit leadership. 3- Hold a leadership team meeting with experienced staff/lay leaders to organize the 18- 24 group and plan upcoming events. 4- Evaluate and solve transportation problems.	Add a program staff position (10% fte); Meeting space for events; Child care space for events	Food/beverages for events; Child care; 5% fte Admin Staff

	<p>Year 2</p> <p>1- Regular leadership meeting(s).</p> <p>2- One event quarterly, including an event during December holidays to include out of state students from the congregation (see Goal II).</p>	Staff time; Event space	<p>Food/beverages for events;</p> <p>Child care;</p>
	<p>Year 3</p> <p>1-Leadership re-assessment of communications, programming needs for this age group.</p> <p>2-Continued quarterly events or as determined in re-assessment.</p>	Staff time; event space	Increase in food/beverages for better attended events
	<p>Year 4, 5</p> <p>1-Well established leadership group for local group with process for succession as students move from the community.</p> <p>2-Well defined recruitment tools</p> <p>3-Integrated programming such as service projects from our Social Justice programs.</p>	25% FTE staff coordinator; Computers, etc for outreach	<p>Computer equipment;</p> <p>Continued child care, refreshment costs for events.</p> <p>13% fte Admin Staff</p>
II- Maintain contact with over half of our recently graduated high school students.	<p>Year 1</p> <p>1- Collect contact data for graduating high school seniors (especially YRUU members), determine a method for future communication</p>	<p>Space, computers;</p> <p>Volunteer/staff time for social media setup, outreach activities</p>	Database entry, access to computers, etc for tracking;
	Year 2		Child care;

	<p>1- Identify volunteers to begin planning an event at Christmas break or during the summer.</p> <p>2- Quarterly newsletter to graduates (or other communication means determined in planning).</p>		Refreshments; Event supplies
	<p>Year 3-5</p> <p>1- Continued increase in electronic contact with college students from the congregation.</p>		

Program/ Ministry: CHALICE CIRCLES
Program Leaders: Mark Evens (ministerial staff)

Vision for 2016

In 2016 there are **Chalice Circles** meeting every day of the week at UUAA and on some days there are two or three meetings. There are Chalice Circles that welcome everyone and other Circles designed for specific groups such as young mothers, youth, and men. They gather in a room designed and dedicated to small group meetings with comfortable chairs, warm lighting, a large coffee table; they feel comfortable and at home. The room is accessible to everyone and has assistive technology for those with limited hearing. Those gathered are sharing, listening, meditating, and forming deeper and more caring relationships with each other. Some become great friends. Over half of UUAA’s members have participated in a Chalice Circle and many have committed to serve as Circle facilitators and leaders. Many members tell each other that their Chalice Circle was the first meaningful involvement they had at UUAA. They feel a greater sense of commitment to the work and ministries at UUAA after this experience. Chalice Circle leaders feel supported and affirmed by ministers, staff, and lay leaders. Leaders are publicly recognized for their efforts at worship services and other events. There are also Chalice Circles meeting in nearby communities like Temperance, Plymouth, Brighton, Chelsea, and Manchester. More folks from these communities know about the UUAA and its faith tradition because of these “satellite” Circles. The UUA and the Heartland District have recognized the UUAA Chalice Circles as an exemplary small ministries program, and several of the program’s leaders have conducted trainings for other congregations.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- To expand Chalice Circle programming and strengthen its outreach programs.	Year 1 1- Appoint a planning task force to expand offering and create specific action steps for the 5 year period. 2- Increase program visibility by recognizing and installing facilitators at the beginning of each program year in a Sunday worship service.	None	None

	<p>Year 2</p> <p>1- Implement first phase of plan</p> <p>2- Assess/analyze, provide homogenous offerings for next program year such as circles for men, young mothers and youth, and provide electronic support for those hard of hearing.</p>	<p>1/8 FTE admin for data gathering and analysis</p>	<p>Update informational materials (\$3900.00), hearing devices (\$2000), supplies and food (\$500.00), materials (\$500.00), and volunteer recognition (\$ 400.00) = Total \$7300</p>
	<p>Year 3</p> <p>1- Implement second phase of plan</p> <p>2- Explore ways Chalice Circles can be available to retirement communities, college campuses, those experiencing disabilities, illness and distance and are unable to get to the church</p> <p>3- Research web based/virtual Chalice Circles</p> <p>3- Assess effectiveness of Tecumseh; Explore remote opportunities in Dexter/Chelsea and Plymouth/Canton.</p>	<p>1/8 FTE communications</p>	<p>(\$3900.00), supplies and food for events (\$600.00) materials (\$500.00), volunteer recognition (\$500.00). Total \$5500</p>
	<p>Year 4</p> <p>1- Reassess plan and its effectiveness on the program, create a new plan for next 5 year period.</p> <p>2- Purchase laptop and other equipment to develop web based Chalice Circles (if warranted by analysis)</p> <p>3- initiate one additional site outside of the Ann Arbor community.</p>	<p>Laptop & data mgt software, [additional equipment if offer remote Chalice Circles (\$ 2,000)], construction of room and furniture (\$6,000)</p> <p>Total \$8000</p>	<p>info and materials (\$500), recognition (\$500), supplies and food(\$600)</p> <p>Total \$1600</p>

	4- Create/build one room or create additional space for Chalice Circle meetings, equip with comfortable chairs, necessary accessories and appropriate lighting.		
	Year 5 1- Implement new plan, monitor what is working well, what is not working, conduct an in depth analysis of all data elements, and identify areas of growth and decline.		Resources: materials (\$600), Supplies/food (\$600), Volunteer recognition (\$700) Total \$1900
II. To make Chalice Circle Program sustainable by recruiting, training and developing facilitators and leaders.	Year 1 1- Initiate steps of plan to have active recruiting programs, such as forums, open houses, and direct recruiting.		
	Year 2 1- Initiate steps of plan to have active recruiting programs, such as forums, open houses, and direct recruiting.		Publicity materials and signage \$900
	Years 3-5 1- Create a vibrant recruiting and development program 2- Partner with other lay leaders to continue a volunteer exposition 3- Empower facilitators to become more active in the leadership. 4- Expand Facilitators' Handbook to include leadership		Leadership consultant to assist in training (\$800)Resources: (\$400); food for events (\$200) Total \$1400

	modules 5- Reassess and develop next 5 year plan.		
III. Form a partnership with Heartland District churches to discuss and collaborate on best practices. This will increase the visibility of the UUA program and its innovative ideas on local and national levels.	Year 1 1- Develop a plan to host a conference, be visible in the Heartland District and create visibility within the UUA community for Chalice Circle plan. 2- Create a program for the Heartland District Conference to be held in March, 2012		Materials for presentation and produce copies of handbook (\$400)
	Year 2 1- Host a conference for Heartland District churches to share programs and identify best practices, identify possible ways of partnering as district.		Food/supplies (\$500) based on number of attendees, materials (\$200)
	Year 3 1- Develop and online messaging system to share ideas or assist member churches, if needed.	Staff support	Computer equipment
	Year 4 1- Lead an on line Chalice Circle among member churches, and if there is interest, host another conference.		Resources: Materials (\$300), food (\$400)

Program/ Ministry: DENOMINATIONAL CONNECTIONS

Program Leaders: Ed Lynn (President of the Congregation), Denominational Connections Team

Vision for 2016

In 2016 the UUAA sent its largest delegation ever to General Assembly. Thanks to scholarship opportunities, this year’s delegation includes a cross-section of youth, seniors, and other church members who would not otherwise be able to attend GA. When the delegates return, they share their experiences, strengthening their connections within the UUAA community and the connections between UUAA members and the UUA. For those not attending in person, the General Assembly is streamed live into our Fahs chapel state-of-the-art audio/visual equipment. Video streaming and other media technology builds community and deepens connections within the congregation, across the Heartland District and the across the wider UUA family.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Participate in purchase of appropriate AV equipment for congregation.	Year 1-5 1-Provide appropriate staff with recommendations for type of a/v equipment needed for high quality live streaming of events.	5% fte staff admin time	Shared resources expected to cost approx \$20,000 (total for 5 yrs)
II. Provide scholarships for GA attendance	Year 1 1- Request budget for one scholarship of \$2000 each 2- Create application form & criteria for awarding scholarships 3- Advertise scholarships in newsletter, SGD communications and UUAA web site, etc.	Staff admin time	\$2,000 in scholarships
	Year 2		\$4,000 scholarships

	<p>1- Request budget for 2 scholarships of \$2000 each</p> <p>2- Update application form</p> <p>3- Advertise scholarships in newsletter, SGD communications and UUA web site, etc.</p>		
	<p>Year 3</p> <p>1- Request budget for 3 scholarships of \$2000 each</p> <p>2- Update application form</p> <p>3- Advertise scholarships in newsletter, SGD communications and UUA web site, etc.</p>		\$6,000 scholarships
	<p>Year 4</p> <p>1- Request budget for 4 scholarships of \$2000 each</p> <p>2- Update application form</p> <p>3- Advertise scholarships in newsletter, SGD communications and UUA web site, etc.</p>		\$8,000 scholarships
	<p>Year 5</p> <p>1- Request budget for 5 scholarships of \$2000 each</p> <p>2- Update application form</p> <p>3- Advertise scholarships in newsletter, SGD communications and UUA web site, etc.</p>		\$10,000 scholarships

Program/Ministry: INTERWEAVE

Program Leaders: Royla Furniss, Leigh Robertson with the support of the Interweave Leadership Team

Vision for 2016

Our thriving Interweave program’s message of welcome is well-known in the Ann Arbor and surrounding area. The group is recognized for its advocacy for LGBTQIA (Lesbian, Gay, Bisexual, Transgender, Queer, Intersex and Allies) people and their families in the community, as part of the Michigan Unitarian Universalist Social Justice Network’s Equal Rights Task Force, and in state-wide organizations. Members of Interweave serve in leadership roles in faith coalitions, state and national organizations. We extend our welcoming message, information about our programs and outreach activities in a wide variety of print and digital formats, including social media, with the help of UUAA’s Program Ministries Coordinator. Interweave continues to expand attendance at their monthly meetings and events, and offers adult spiritual growth and development classes. Our strong Interweave program, with outreach to local college campuses, attracts new people to the UUAA and many become members of the congregation and trained leaders in Interweave and other UUAA programs.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Bring new members to the UUAA via Interweave.	Year 1 1-Offer child care during meetings / events. 2- Update brochure about Interweave for use at LGBTQIA conferences and events.	Communications Coordinator staff time; Space and personnel for child care	Brochure creation & reproduction (\$300)
	Year 2 1-Advertising in LGBTQIA/other publications (BTL, Outpost, AA.COM) 2- Improved A/V presentations at events	Communications Coordinator staff time; Continue child care; A/V support	Above plus Advertising budget (1000) A/V equipment (general need for church) ~2000;

	<p>Year 3</p> <p>1-Provide transportation to Interweave meetings</p> <p>2-Teach Adult SGD classes</p>	<p>Van for transportation? Hired shuttles?</p> <p>SGD coordination</p>	<p>Materials for SGD class</p> <p>Transportation costs TBD</p>
	<p>Year 4, 5</p> <p>Continued child care, transportation, SGD classes, brochure updates, advertising as per evaluation of effectiveness</p>		
II. Become LGBTQI Social Justice Leaders in Michigan	<p>Year 1</p> <p>1- Continue building connections to other LGBTQI Social Justice Groups including The Jim Toy Center, Riot Youth and Inclusive Justice, Oasis and other congregations working for inclusion and equal rights in Michigan.</p>		<p>Conference fees (\$1000)</p>
	<p>Year 2</p> <p>1-Continue to build connections to other LBGTQIA groups in other faith communities</p> <p>2-Continue connections with LBGTQI efforts in our UU district.</p>	<p>Brochure updates as in Goal I.</p>	<p>Continued brochure, conference fee support</p>
	<p>Years 3-5</p> <p>1-Continue building connections</p> <p>2- Become leaders of groups outside UUAA in Michigan</p> <p>3- Host a conference at UUAA</p>		<p>Continued brochure, conference fee support;</p> <p>A/V equipment, space to host conference</p>

Program/Ministry: OUTDOORS, LAND USE
Program Leaders: John Erdevig, Ann Jones

Vision for 2016

We believe our land needs to be accessible to people of all physical abilities and we use the bounty of our land to share with others. Our Master Site Plan completed in 2012 guides our property development. We have improved access and use of the land in many ways. People come to walk on the land that has interpretive displays on the walking paths. We have constructed a beautiful pavilion where people of all abilities can enjoy the view. When coffee/social hour is bustling with people many move out into the patio area to catch up and reflect on the service. We had a successful Capital Campaign that allowed us to rebuild our parking lot and beautifying the church entrance. The UUAA community dreams big. Here are some of our ideas for the future:

- Outdoor concerts
- Walking trail system (self-guided, signage included)
- Working farm with youth participating
- Sledding hill
- Retreat Center
- Observation deck and pond

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Complete the Master Site Plan, prioritize and implement	Year 1 1- Complete the 5 year Master Site Plan. 2- Prioritize items- Reconcile with Strategic Plan* and other criteria (eg: cost, number of people who will use, Core Values, etc)	Staff time for review	

	3- Approvals for prioritized plan.		
	Year 2-3 1- Implement plans as priorities and budget allow.	The Master Site Plan lists staffing, etc.	The Master Site Plan includes costs
	Year 4- 5 1- Re-prioritize after adjusting for progress made in years 1-3		

*For example, this Strategic Plan includes goals for: Worship- Outdoor services; SGD- Projects on Land; Facilities - new parking lot; Welcoming Ministries - Inter-generational picnics, gatherings outdoors.

Program/ Ministry: LEADERSHIP DEVELOPMENT
Program Leaders: Ed Lynn (President of the Congregation)

Program Vision for 2016

There is a strong focus on growing congregational leadership at all levels and in all aspects of the church (including youth). There is a strong commitment to lay leadership identification and development and to an expanded Leading with Love program.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I. Develop a Leadership Development Team.	Year 1 1. Identify a team charged with: <ul style="list-style-type: none"> • Determining leadership needs - job description for not just Board members but selected program coordinators; • Reviewing leadership development materials from the UUA and district (eg: Leadership Development in the Large Congregation (PDF) by Rev. Stefan Jonasson); • Investigating leadership programs at other UU churches; • Assessing needs for lay leadership development at UUA. 2. After assessing needs, LDT develops a full plan on which positions to oversee; frequency of Leading with Love classes; how to collect data (congregant skills, other data for identifying future leaders; ways to make resources available to support lay leaders (instructions for how to reserve social hall tables, place newsletter articles, press releases, reserve rooms...), plan for any ongoing leadership meetings, outside training, etc.	Staff time to guide team. Board time to guide team.	

	<p>Year 2</p> <ol style="list-style-type: none"> 1. Begin implementing plan arising from year 1 assessment. 2. Implement any improvements in congregational data collection. Evaluate effectiveness of data collection. 3. If appropriate, send a team member or staff member to outside training for developing leadership. 4- Conduct leadership training in addition to Leading with Love (half day retreat or evening presentation, webinar, etc) 	Staff time to guide team.	Possible cost of outside training / conference.
	<p>Year 3-5</p> <ol style="list-style-type: none"> 1. Continue developing the LDT and evaluating the leadership development programs for continued expansion / modification 		
II - Congregational funding for Leading with Love classes.	<p>Year 1-5</p> <ol style="list-style-type: none"> 1-Provide funding to pay for materials for the Leading with Love class that provides leadership training. 2- Hold Leading with Love classes on a regular schedule. 		\$ 2000 annually, materials

Program/Ministry: MEN'S PROGRAMMING
Program Leaders: Mark Evens (ministry leader)

Vision for 2016

In 2016 any man of any age can walk into the Congregation and easily know what Men’s Programs are available and how to access them easily. Men’s programs nurture active, creative settings for men to come together and make friendships at differing age levels and across nationalities, sexual preference, etc. Men’s groups, dinners and retreats continue to flourish and enrich relationships among male congregants. The group puts on at least one major event for the Congregation each year, and is engaged in mentoring of our young men/youth. They are also actively involved in service projects for men that are enjoyable and self-directed on the property and/or within the Ann Arbor community. Our Congregation is an anchor congregation for district-marketing and a model for successful Men’s Councils and Men’s Programs.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Increase the number and kinds of Men’s Circles	Year 1 1-Research, examine, and seek to improve men’s circles 2-Form new men’s circles	Blogging software at UUAA.org to help communicate to congregation	
	Year 2 1-Bring together the various men’s circles. Help them to thrive, be visible and interact 2-Provide different modes for men’s circles		
II- Increase the number of	Year 1 1-More thorough mentoring of UUAA young men/youth, like the boy’s		

young men participating in activities.	initiation. 2-Increase participation of youth in men's activities like the men's circles, annual dinner and retreat.		
	Year 2 1-Create and disseminate a successful model for Men's Council and Men's Programs		
III. Plan more service projects and events for men	Year 1 1- Plan service projects for men that are enjoyable and self-directed on UUAA property.	Project cost-sharing for larger projects	To date most needed resources have been self-funded.
	Year 2 1-Plan service projects for men within the larger Ann Arbor community		
	Years 3-5 1-Plan a major event for the congregation.		A/V equipment (general need for church) ~\$2000;

PROGRAM: Music PROGRAMMING

Program Leaders: Gail Geisenhainer, Glen Thomas Ridout

Program Vision for 2016

In 2016 the UUAA music program is exuberantly “Singing the Living Tradition.” It engages the congregation and the community in spiritual growth through musical excellence. . Our new grand piano shines in the sanctuary. Music is integrated into all aspects of the congregational life. Our music program team, led by our talented director, has the time and resources to inspire us in worship whether through our collective singing, in the choir or bell choir, and with special performers. There are music programs that engage our children, youth and young adults. We have created six different choirs and three music ensembles. The UUAA music program has hosted the annual Southeast Michigan UU choir festival, and we are hosting monthly musical events bringing in more folks from the community and more revenue..

Program Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Acquire a grand piano for the main sanctuary.	Year 1 1-Conversations with congregation about suitability of grand piano over organ. 2- Form a committee to research piano purchase/ rental costs.	Staff time, volunteer time, meeting space	None

	<p>Year 2</p> <p>1- Continue conversations with congregation and music ministry constituents about grand piano.</p> <p>2- Integrate grand piano acquisition into Capital Campaign</p> <p>3- Continued research into purchase/rental costs</p>	Staff time, volunteer time, meeting space	None
	<p>Year 3</p> <p>Continue above and</p> <p>1-Finalize choice of instrument and cost figures.</p> <p>2- Generate annual maintenance schedules/maintenance costs for all UUAA instruments.</p>	Staff time, volunteer time, meeting space	None
	<p>Year 4</p> <p>1- Purchase Grand Piano</p> <p>2- Set concert and rental schedule.</p>	TBD	Will be determined by earlier research. [25k range?]
	Year 5	TBD	TBD

	1- Celebrate!! Include lots of music in celebrations of our 150th Anniversary.		
II- Staff Music Program appropriately for a large congregation.	<p>Year 1</p> <p>1- Music representatives work with Human Resources Advisory Team on job descriptions.</p> <p>2- Work with Programs Coordinator on staff structure.</p>	Staff time	None
	<p>Year 2</p> <p>1- Senior Minister and music staff draft a music staffing plan, including detailed job descriptions.</p> <p>2- Integrate staffing plan into Capital Campaign narrative.</p> <p>3- Hire a .25 fte Children/Youth Music Coordinator</p>	- Office space and equipment for new hire	\$9000 Youth Music Director salary; plus equipment
	<p>Year 3</p> <p>1- Make Music Director between .75 time and full time</p> <p>2-Hire half time Music Manager</p>	- Office space and equipment for Music Manager	\$18,000 - 36,000 Music Director salary; plus equipment

	<p>Year 4-5</p> <p>1- Increase Youth Music director to half time</p> <p>2- Review Music job descriptions and staffing structure. Adjust as needed.</p>		\$9000 salary increase for Youth Music Director.
III. Integrate Music Program into all aspects of congregational life.	<p>Year 1</p> <p>1- Connect with SE Michigan UU Choir Festival folks.</p> <p>2- Coordinate Summer SGD/Music with SGD Program Assistant.</p>	- staff time	
	<p>Year 2</p> <p>1- Re-introduce singing at staff meetings</p> <p>2- Re-establish Children's Choir (Chalice Sparks)</p> <p>3- Draft integration plan with SGD</p> <p>4- Participate in plans for 150th Anniversary Celebration</p>	- staff time	
	<p>Year 3</p> <p>1- Continued planning for 150th Anniversary</p>	- staff & volunteer time, space for library	?cost for library expansion

	<p>Celebration</p> <p>2- Expand UAAA Music Library</p> <p>3- Draft integration plans with LDT, LWL, Social Justice & Pastoral Care</p>		
	<p>Year 4</p> <p>1- Continued planning for 150th</p> <p>2- Review and expansion of all integration plans.</p>		TBD
	<p>Year 5</p> <p>1- 150th Celebration with lots of music.</p>		TBD

Program/ Ministry: PARTNER CHURCH
Program Leaders: Phyllis Valentine and Gretchen Jackson (volunteer leaders)

Program Vision for 2016

The Faith without Borders Program - our international efforts in Transylvania and the Khasi Hills -- is an integral part of UUAA Church life. Congregants know about the lives, culture and religious practices of our partners. The UUAA sponsors regular visits from Rev. Maria Pap and other members of our Partner Church Congregation in Transylvania to the UUAA. Numerous pilgrimages including youth and families are made by members of the UUAA to Transylvania and the Khasi Hills, India. Congregation members have long term relationships with students in the Khasi Hills schools, as well as helping to facilitate the expansion of school facilities and teacher training opportunities for faculty and administrators in Meghalaya. Brochures featuring the Faith without Borders program are available on the Involvement table and in new member packets; and information is on the website. The partner church program is included in Social Justice Programming and in the Spiritual Growth & Development classes and activities for children, youth and adults.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Increase the visibility and deepen the involvement of these programs in our congregation	Year 1 1-Create a Partner Church Brochure and make it available at the Involvement Table and in new member packets. 2- Institute an annual partner church service which would either involve a sermon by a “visitor” or a member of our clergy.	Ministerial time for planning annual service.	Brochure creation & reproduction (\$300) \$1000 salary stipend for Maria Pap (current level-annual)

	3- Explore new ways to promote visibility of the programs.		
	<p>Year 2</p> <p>1-Visits by Rev. Maria Pap and/or other members of our Partner Church Congregation</p> <p>2- Continue planning for pilgrimages made by members of the UUAA to Transylvania including participation of youth and families.</p>		<p>\$2,000 for 1 visitor from Transylvania ("land costs" - housing, meals and local transportation provided by members at no cost.)</p> <p>\$1500 - 2 scholarships (annual)</p>
	<p>Year 3</p> <p>1-Develop / provide materials for the Spiritual Growth & Development program that provide information about the international origin of UU and existence of UU in other parts of the world (for youth and adults).</p> <p>2- Look for ways to integrate partner church activities with a Social Justice project.</p>	<p>Staff time for SGD materials; Social Justice Coordinator time for outreach project.</p>	<p>Materials for SGD class</p>

Program/ Ministry: PASTORAL CARE
Program Leader: Meredith Ley (part-time staff - 12 hours/week)

Vision for 2016

The spirit of our congregation is love. Everyone understands that caring for one another is an integral part of who we are as a community and so we especially value our Pastoral Care Program, a program of ministry to each other. Over the last years we have developed a strong, well trained, compassionate team of Pastoral Care volunteers who serve the many needs of our congregation. They are installed as Pastoral Care Assistants by the congregation and are recognized for their service on a regular basis. Pastoral Care programming has been expanded to better serve seniors, young families and the increasing needs of a growing congregation. The UUAA building now includes a "comfort room" with comfortable furniture and a quiet homey ambiance that creates a spiritual space for support groups, Pastoral Care meetings and lay minister conversations with congregants. seniors, congregants with disabilities and young adults maintain strong connections with UUAA by taking advantage of transportation to Sunday services and the many special programs arranged by Pastoral Care volunteers and staff.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Expand the Pastoral Care program and fully integrate it into the UUAA culture.	Year 1 1- Assess/survey current understanding of "caring for one another" within the congregation. 2- Create a plan and strategies to integrate everyone into this program.	Additional staff time (1/5 fte); data entry (paid or volunteer); office space	Database modules and web access; tools for analysis (\$3000)
	Year 2 1- Implement plan with lay leaders (forums & educational sessions)	Continued	continued

	2- Pastoral Care Assistant and Leadership installation as part of a service to raise visibility		
	Year 3, 4, 5 1- Implement plan with congregants; develop a caring ministry by example; 2 Reassess/survey congregants as needed to further develop Pastoral Care programming.	Continued	Continued
II- Develop a strong, well trained team of Pastoral Care volunteers who can meet the needs of a large congregation	Year 1 1- Evaluate current Pastoral Care volunteers' ability to meet needs; 2- Reengage existing volunteers by involving them in the plan and initiating team development efforts. 3- Create a training plan.	Staff time & office space as above	Materials, background checks, recognition awards, etc (\$2000 per year)
	Year 2 1- Recruit new volunteers 2- Train and continue team development efforts. 3- Create volunteer structure including team leads 4- Create an effective volunteer reward program	Continued	Continued
	Year 3, 4, 5	Continued	Additional materials needs

	<p>1- Assess needs again.</p> <p>2- Evaluate all assessment data, analyze team effectiveness and lay leadership structure</p> <p>3- Implement new plan for infrastructure, policies, services, quality of program and redesign materials.</p>		
<p>III. Expand Pastoral Care to better serve seniors, young families and the increasing needs of a growing congregation.</p>	<p>Year 1</p> <p>1- Discussion with the pastoral leadership and Care Assistants-what we do well, what we need to improve and create a plan to attain/maintain a high quality of service.</p> <p>2- Develop additional services phased in to match increase in volunteers.</p>		
	<p>Year 2</p> <p>1- Implement plans from assessment.</p> <p>2- Develop a tool to gather service quality data from all care receivers.</p> <p>3- Brainstorm and create a working plan to enhance, increase services to young families, seniors and others (eg: increase senior lunch programming)</p>		
	<p>Year 3</p> <p>1- Design a comfort room (quiet ambiance, a spiritual space for support groups, Pastoral Care meetings and lay minister conversations with congregants.)</p>		

	<p>Year 4</p> <p>1- Implement plan for comfort room;</p> <p>2- Evaluate need for purchase of van to provide rides to congregants for Sunday services, other activities such as senior lunch</p>	Space for comfort room;	<p>Furnishings and fixtures for comfort room (\$5000)</p> <p>Speakers and programming (\$1000)</p>
	<p>Year 5</p> <p>1- Evaluate all data gathered from the three goals; evaluate measured success of plan, full report to Ministers and Board.</p> <p>2- If need exists, purchase a van and hire a driver with chauffeurs license</p>		<p>Handicap equipped van & insurance, upkeep (\$55,000); Driver (\$28,000)</p>

Program/Ministry: SPIRITUAL GROWTH & DEVELOPMENT- Adult
Program Leaders: Sandy Garges

Vision for 2016

In 2016 the Spiritual Growth and Development program creates an environment that fosters dedicated participation in our Congregation and develops roots in Unitarian Universalism. The program attracts increased participation and inspires our adults with a new, enriched, engaging curriculum that incorporates music, social justice activities, our site, and up-to-date technology. Half of Congregation members participate each year in year-around adult program tied to children and youth learning, worship themes and the Congregation’s work in the larger community. Activities are supported by an increased supply budget. The program fosters intergenerational activities and incorporates the talents and passions of our congregants. The ongoing development and assessment of this program is a collaboration of congregational members and staff through the SGD Program Development Committee and includes consideration of suggestions make as a part of the strategic planning process. The program is supported by ongoing professional development for its lay and staff leadership.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I. Provide an adult spiritual growth and development leader.	Year 1 1. Form a volunteer committee to work with staff to begin an Adult SGD program. 2. Review adult programs in other congregations, material from UUA, etc. 3. Survey the congregation for needs and wants in the UUA program. 4. Write a job description for an Adult SGD Coordinator	Volunteer committee needed.	

	<p>Year 2</p> <p>1. Adult SGD Coordinator in place</p>	<p>Volunteer or 50% FTE Adult SGD Coordinator (20,000);</p> <p>Office space and equipment</p>	Materials
	<p>Year 3-5</p> <p>1- Continue to survey needs and increase time commitment of Adult SGD Coordinator as needed up to full time</p>	1 FTE Adult SGD Coordinator (40,000)	
II. Design and implement an Adult SGD program	<p>Year 1</p> <p>1- Survey congregation for UUAA needs for Adult SGD programming.</p>	Volunteer committee	
	<p>Year 2</p> <p>1- Review survey of UUAA needs for Adult SGD classes.</p> <p>2- Determine Social Justice projects that would be part of Adult SGD programming.</p> <p>3- Obtain the annual worship service calendar.</p> <p>4- Draft a curriculum for adult SGD, including teaching/learning processes.</p> <p>5- Obtain CEO and Board approval and obtain resources required for a phased three-year start up of the program.</p>	50% FTE Adult SGD Coordinator as in	
	<p>Year 3</p> <p>1- Staff adult SGD programs according to the first year start-up</p>		

	sequence 2- Publicize the program with members/friends.		
	Year 4 1- Evaluate the first year of programming and adjust as needed 2- Add additional classes.		
	Year 5 1- Reassess and expand program as needed.		

Program/Ministry: SPIRITUAL GROWTH & DEVELOPMENT - YOUTH

Program Leaders: Sandy Garges

Vision for 2016

The Spiritual Growth and Development program creates an environment that fosters dedicated participation in our Congregation and develops roots in Unitarian Universalism. The program attracts increased participation and inspires our children with a new, enriched, engaging curriculum that incorporates music, social justice activities, our site, and up-to-date technology. Families are intentionally welcomed with a coordinated program including a parent orientation, follow-up and enhanced communication. Activities are supported by an increased supply budget. The program fosters inter-generational activities and incorporates the talents and passions of our congregants. The ongoing development and assessment of this program is a collaboration of congregational members and staff through the Spiritual Growth & Development Program Development Committee and includes consideration of suggestions made as a part of the strategic planning process. The program is supported by ongoing professional development for its lay and staff leadership.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I. Increase participation and engagement in the Spiritual Growth & Development's Children and Youth Programs	Year 1 Put into place Interim Director of Spiritual Growth and Development Replace administrative support lost during leadership transition (.5 FTE). Assess technology needs and purchase technology to enhance administration and teaching of SGD classes. Children, youth, parent and teacher satisfaction surveys completed and evaluated.	Admin support - 50% FTE	Materials & supplies \$3,000
	Year 2 Create a SGD Program Development Committee made up of congregational members and staff to collect and analyze data,	Establish Program Dev Committee; New staff 25%	Support for work Program Development Committee \$500

	<p>research programming options and propose a plan. Adopt an SGD logo. Revamp SGD website information Create and maintain a list of congregants' passions/activities Hire permanent program leader full time (.25 FTE increase, continuing). Provide professional development funding for each SGD employee 3000</p>	Program Development	\$3000 professional development funds (yearly)
	<p>Year 3</p> <ol style="list-style-type: none"> 1. Coordinate family welcome; follow-up with people who do not attend regularly. 2. Initiate a Parent Orientation and registration process. 3. Integrate pastoral care, music, social justice activities into the SGD program. 4. Increase SGD budget to cover supplies and activities and eliminate any fees for participating families. 5. Track attendance, volunteers, and registrations 6. Begin Religious Education certification process if lay SGD leader in place (if without certification) 7. Add .5 FTE Family Welcome Coordinator (continuing budget item) 8. Technology improvements (projectors and smart boards for classrooms, computer for teacher use, printer dedicated to SGD wing 9. Field trips, overnights, teacher training, curriculum development, classroom supplies, newcomer welcome and volunteer appreciation 	50% FTE Welcome Coordinator (20,000)	<p>(\$2,000 continuing for 3 years total).</p> <p>\$15,000 - one time tech expense).</p>
	<p>Year 4-5</p> <ol style="list-style-type: none"> 1. Initiate summer camp 2. Improve student/teacher ratios. 3. Track attendance, volunteers, and registrations. 		\$2500 yearly

	4. Survey parents, students, and teachers.		
II. Increased participation of congregants volunteers	<p>Years 2</p> <p>1. Improve visibility of program to congregation</p> <p>2. Survey of ways congregants might want to participate in SGD programs and then actions based on survey results.</p>		

Program/ Ministry: SGD- YRUU

Program Leaders: Rev. Andrew Weber, lay representative Alexandra Todd

Program/Ministry Vision for 2016

High school youth are valued participants in all aspects of congregational life, including congregational governance and worship. Many of them have graduated from an exemplary Coming of Age program, eager to put their faith into action in the congregation’s worship, spiritual growth, social justice, and stewardship activities. Youth are sharing responsibilities for Sunday worship activities as ushers, readers, musicians, and preachers. and some are teachers in the SGD programs. They have initiated social justice programs that are meaningful to their own life goals. There is a youth leader serving on the UUAA Board of Trustees. The youth are more engaged in meaningful relationships with the both the adults and the children at UUAA. They feel valued and affirmed by these relationships. Adults in the congregation are enthused and enriched by the active engagement of youth. When the youth graduate from High School, they continue to feel a commitment to the YRUU. They seek to live in concert with their values, and continue to develop in spiritually meaningful ways.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I. Increase youth engagement in all congregational activities, including leadership and governance.	Year 1 1- Change the usual meeting time for YRUU from Sunday morning to another time so that youth can fully participate in worship services 2- Survey Social Justice Projects to determine which are suited to youth involvement.	Increase YRUU staff associate’s weekly hours from 10 hours a week to 15 hours a week	
	Year 2 1- Support and coordinate transportation of youth to all congregational activities. 2- Training and support for adults engaged with youth in	Transportation tbd	Training?

	<p>congregational activities so that youth involvement is authentic</p> <p>3- Increase involvement of youth in Social Justice and other programs.</p>		
	<p>Year 3</p> <p>1- Institute a youth representative on the Board of Trustees</p> <p>2- Involve youth in the Leadership Development Team</p>		
	<p>Year 4</p> <p>1- Increase youth involvement in worship services</p> <p>2- Institute an annual worship service led by the youth.</p>		

Program/Ministry: SOCIAL JUSTICE
Program Leaders: Kate Warner and Sandra Stewart (volunteer leaders)

Vision for 2016

At the UUAA, Social Justice is the ministry of the entire congregation. The mission of the Social Justice program is to coordinate, support and inspire the congregation’s efforts to advocate, educate, organize, serve and witness for social action as well as to establish the UUAA as a beacon for social justice in our community. With a full understanding of our clout as a large sized congregation, we have begun to move from facilitating “individual” awareness of issues to identifying areas for “collective” congregational action. In our second year with a full time “Coordinator of Social Justice,” we not only are working collaboratively between the Spiritual Growth & Development program and the adult Social Justice program, but we have reached out into the community to work collaboratively on issues where collective action needs to be taken. In 2016 we have hired an intern to help expand our program.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Social Justice becomes a ministry of the entire congregation.	Year 1 1- Strengthen the involvement of the congregation in social justice ministries by providing opportunities for collaboration within the UUAA. 2- Offer Social Justice “moments” on Sundays and/or Congregation-wide days of action. 3- Create a job description to aid in a search for a paid staff member, a “Coordinator for Social Justice.”	Social Justice Council strengthened	NA

	<p>Year 2</p> <p>1- Explore avenues for collaboration between the Social Justice Council and the Spiritual Growth & Development program in working together on social justice issues.</p> <p>2- Hire a .5 staff “Coordinator for Social Justice” (including salary, medical benefits, plus a travel budget to attend GA, Heartland, etc.)</p>	.5 FTE + benefits & office equipment for “Coordinator for Social Justice”	? Travel budget for GA, Heartland conferences
	<p>Year 3</p> <p>1- Strengthen avenues for collaboration between the Social Justice Council and the Spiritual Growth & Development program in working together on social justice issues.</p> <p>2- Provide internal skill building - providing regular opportunities for training in advocacy and volunteer recruitment and retention</p> <p>3- Facilitate internal coordination and communication for all social justice programs</p> <p>4- Begin to incorporate strategic planning for the social justice council</p>	increase to .75 FTE “Coordinator for Social Justice”	? Training budget and materials
	<p>Year 4</p> <p>1- Develop concepts and coordinate an Annual Social Justice Conference and congregation-wide days of action.</p> <p>2- More outreach to external world. External networking (attending meetings, getting to know leadership) with groups like MUUSJN, ICPJ, UUSC, Heartland Region, Washtenaw County - actively looking for opportunities to expand our work, find collaborations.</p>	Increase to 1.0 FTE “Coordinator for Social Justice”.	? Conference hosting budget
	<p>Year 5</p> <p>1- External “public relations” - communicating with media, local</p>	Intern to help expand the social justice effort at the UAAA. (paid or	

	funders (we are also a funder!) about our work, seeking out opportunities for promotion of our activities and efforts. 2- Hire a Social Justice intern.	unpaid tbd)	
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Program/Ministry: WELCOMING MINISTRIES

Program Leader: Hannah Hotchkiss (staff)

Program Vision for 2016

UUAA is a welcoming congregation where members feel a strong sense of community. There has been increased retention of both new and long-time members, in part due to the weekly multi-generational events. These events provide a meal, worship and both adult and children’s programming. Child care is always available. About once per month there is special programming such as concerts or storytellers that attracts people from the wider community.

Most members of the congregation are engaged in one or more volunteer activities, because as we describe our congregation, “service is it’s law.” UUAA has a comprehensive program to coordinate placement of volunteers, including a handbook that lists volunteer opportunities, with clear descriptions that can be used as a reference to match talents and interests with positions. New members are interviewed about their talents and gifts and the various opportunities to apply them. Welcome Ministry staff has obtained professional training in volunteer coordination, recruitment and retention. The volunteer coordination program is evaluated every few years to improve efficiency and effectiveness of placement and on-going development.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I. Provide weekly multi-generational events open to all congregants.	Year 1 1-Plan at least two multi-generational events for the year - includes a meal, adult programming, worship, children’s programming, and childcare. 2- Create a strategy for a monthly program the next year.	Staff: 8 hours of planning / staffing (9 hours per event). •Use of rooms, Kitchen and AV equipment.	\$600 for food/programming (\$300 per event)
	Year 2 1-Increase frequency of multi-generational events to	Staffing: 81 hours of planning/staffing = 1/8	Finance: \$2,700 for food/programming

	monthly (during the school year)	time (9 hours per event). Facilities / equipment as above	(\$300 x 9 events) (plus staff time)
	Year 3 Increase frequency of multi-generational events to twice monthly during the school year	Staffing: 162 hours of planning/staffing (25% FTE)	Finance: \$5,400 for food/programming (\$300 x 18 events)
	Year 4 Increase frequency of multi-generational events to weekly during the school year	Staffing: 324 hours of planning/staffing = 1/2 time FTE Facilities / equipment as above	Finance: \$10,800 for food/programming (\$300 x 36 events)
	Year 5 1-Continue weekly multi-generational events 2- Once per month provide programming to attract and welcome the larger community (concerts, story tellers, etc.)	As above	As above
II. Create a developed, well-coordinated volunteer placement program.	Year 1 1-Start to plan and institute a comprehensive volunteer coordination program. 2-Work with ministers, board, and staff to define expectations of membership regarding volunteering. 3-Work with established groups to evaluate existing volunteer opportunities (e.g., social justice programs such as Alpha House and Delonis, and internal opportunities such as Family Camp and Sunday Welcome Teams).	Staffing: 10 hours/week. .25FTE Office equipment for publicity and materials.	
	Year 2	Staff time 10 hrs/wk.	\$250 for professional

	<p>1-Implement a comprehensive volunteer coordination program.</p> <ul style="list-style-type: none"> • Provide Welcome Ministry staff with professional training in volunteer coordination. • Create a UUAA volunteer handbook that provides a list of programs and their volunteer positions, mission, expectations, and time required. • Ensure that volunteer expectations are clearly presented in the Introduction to Our Faith classes and in new-member materials. • Create a Talents and Gifts interview to be conducted with new members signing the membership book. • Welcome Ministry coordinator and Membership Committee begin interviews with new members within two months of joining. 		<p>training of Welcome Ministry staff</p> <p>Access to tools such as Constant Contact or Survey Monkey.</p>
	<p>Year 3</p> <p>1-Plan and conduct an evaluation of the volunteer coordination program (assessing volunteer tracking tools, interest survey, and new-member interview process, etc.)</p> <p>3-Continue to interview new members and add 2-year members to the interview list.</p> <p>4- Train membership committee in conducting interviews and matching volunteers to positions.</p>	<p>staff 10 hours/week.</p>	<p>\$800 materials.</p> <p>Access to tools such as Constant Contact / Survey Monkey.</p>
	<p>Year 4</p>	<p>Staff10 hrs/wk.</p>	<p>Finance: \$800 training,</p>

	<p>1- Continue to interview new members as they sign, and expand to longer term members.</p> <p>2- Continue training in recruiting and retaining volunteers.</p>		<p>materials</p> <p>Access to tools such as Constant Contact / Survey Monkey.</p>
	<p>Year 5</p> <p>1-Conduct a comprehensive study of our congregant volunteer engagement at regular intervals of membership (i.e., 1st-year members, 3-year members, 5-year members).</p> <p>2-Continue the evaluation of the volunteer coordination program processes of placement and on-going development and make adjustments as needed.</p>	As above	As above
II. Develop and implement metrics for tracking visitors and members in / out, etc.	<p>Year 1</p> <p>1- Learn technology needed to track member status and visitors.</p> <p>2- Develop periodic reports on members joined, members resigned, member engagement in activities, visitors attending orientations, etc.</p>	Technology for tracking information	
	<p>Year 2-5</p> <p>1- Evaluate and expand metrics.</p>		

NOTE: Estimates of Staff time and salary do not necessarily require new staff or funds for Welcome Ministry time from Welcome Ministry specifically allocated to the given projects. This may mean a reassigning of other tasks.

Program/Ministry: WOMEN'S PROGRAMMING
Program Leaders: Mark Evens (ministerial); Margaret Pekarek (volunteer)

Vision for 2016

Our Women’s Programming has developed to address the spiritual, personal, social and outreach/social justice needs of the women of the UAAA Congregation. A survey of the congregation in 2012 identified needs and opportunities in many areas and led to the formation of a Women’s Council. The Women’s Council has overseen new program development in addition to monitoring how women are integrated into the many program areas of the congregation. (See note following the table below)

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
I- Build Women’s programming based on a needs assessment survey.	Year 1 1-Identify volunteers to develop survey and research programming available in UUA and District..	10-15 hours quarterly staff support time	
	Year 2 1. Needs assessment survey of women in the congregation. (Differentiate Members from total group). 2. Investigate programming available on national and district level.	10-15 hours quarterly staff support time; Computer time for survey.	
	Year 3	TBD Staff support time	[All TBD since unknown until needs

	1. Stage a women's event (depends on needs assessment, might include retreat, major speaker or day long seminar) 2. Development of self-sustaining organization (e.g.: Women's Council) for on-going programs such as adult SGD, retreat, annual events. Based on needs assessment.		assessment and planning: possible speaker fees, food, child care, etc]
	Year 4, 5 Continued program development as per needs survey		

NOTE

Since there is little women's programming in place as of this writing in 2011, specific objectives for the programming itself are not possible in advance of a needs survey and leadership recruitment. Some ideas that have been put forward include: an annual 3 day retreat; adult SGD classes specific to women's need; a program that links generations to provide wisdom, guidance and support. An annual speaker event and seminar to draw women from the community and from other congregations in the Heartland District. A web site specific to women's programs. Information posted on social media A Women's Council that promotes participation of women in on-going programs in the congregation. Creation of a program each year for disadvantaged women in the surrounding communities (in coordination with the Social Justice Team). Active participation in district events and in General Assembly. UUAA women provide a workshop each year at the Heartland District Annual Meeting and also at GA.

Program/ Ministry: WORSHIP
Program Leaders: Rev. Gail R. Geisenhainer, Senior Minister

Program Vision for 2016

In 2016 UAAA is providing a variety of inspirational, multi-media, multi-venue, accessible worship services with lay participation. The content of the services is integrated with congregational programs including themes in Spiritual Growth and Development classes for children and youth. Worship services are inspirational, informative, engaging and relevant. A variety of services held at different times and locations meet the needs of special constituencies. Sermon content is integrated and mutually reinforcing with other programs of the Congregation. The sense of community is enhanced by member participation in the services. Worship services are held in the building and in accessible natural settings on the property. The use of new forms of media enhances our services.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
Provide inspirational, multi-media, multi-venue, accessible worship services with lay participation and which are integrated with other Congregational programs.	Year 1 1. Provide admin Support for Senior Minister 2. Improve sound system in Phifer sanctuary	Staffing - - Executive Asst to the Senior Minister - Program/Ministries Coordinator.	Upgrade/repair Phifer Sanctuary sound system (cost?)
	Year 2 1. Establish a lay preaching and worship associate program 2. Establish summer Preaching Internship	Intern Funding \$6,000 annually	

	<p>Year 3</p> <p>1- Increase the number of services to 3 per week and increase venues;</p> <p>2-Add worship services for specialized groups (e.g. youth)</p> <p>3-Become a Teaching Congregation and mentor a Ministerial intern.</p> <p>4- Share what is unique to worship at UUAA with District and UUA</p>	<p>Increase in Welcoming Ministry Coordinator time (3rd service)</p> <p>Intern Funding: \$15,000 annually</p>	<p>A/V equipment in Jackson Chapel, Fahs Chapel</p>
	<p>Year 4</p> <p>1- Begin emphasis on adding outdoors worship, focus on area outside Gaede Social Hall</p>	<p>Acoustics and accessibility in area outside Gaede Social Hall</p>	
	<p>Year 5</p> <p>1- On-going emphasis on increasing outdoor worship experiences, focus on outdoor chapel.</p>	<p>Acoustics and accessibility in outdoor chapel: paths</p>	<p>Portable acoustic equipment</p>

Cross-Program UUAU Institution Goals and Objectives

Vision for 2016

Our congregation has a rich array of programs/ ministries that are fully funded and well managed. Each person has a ministry and finds a place in our community. All have meaningful connections in which individual differences are celebrated. Our Congregation is a place where all know the direction in which we want to move, where all are engaged in the mission of the congregation. Everyone knows how to get things done, all know what is going on and how to become involved. We review our direction and progress toward goals annually. Staff and volunteers work together in a beautiful, well-maintained building, where we bring to life our Core Values/Ends and use our large church voice to make a difference in the world.

Goals and Objectives by Year

GOAL	Objectives	New Infrastructure Needed	Other Costs
STAFFING I. Increase staffing and focus staff roles - sufficient to sustain current programs and to be ready for future growth.	Year 1 1- Hire full time Exec Asst for the Senior Minister. 2- Create a new position - Programs Coordinator (has expertise in communications and technology) 3- Hire part-time (25%) Social Justice Coordinator. 4- Reconfigure the office staff per the Alban report 5- Hire a Development Coordinator (25%)	Office space	Equipment
	Year 2 1- Increase the Social Justice coordinator to 50%. 2- Hire a coordinator for Campus and Young Adult Ministry (25%)	Office space	Equipment

	<p>Year 3</p> <p>1- Increase the staffing levels in Spiritual Growth and Development in line with growth in numbers in the program.</p> <p>2- Increase the Social Justice coordinator to 75%.</p> <p>3- Increase the Music Director to 75%.</p> <p>4- Increase the Welcoming Ministry Coordinator to 75% (when number of weekly services increases).</p>	Office space	Equipment
	<p>Year 4</p> <p>1- Increase the appointment of the Social Justice Coordinator to 100%.</p> <p>2- Increase the appointment of the Music Director to 100%.</p>	Office space	Equipment
	<p>Year 5</p> <p>1- Increase the appointment of the Pastoral Care Coordinator from 30% to 50%.</p>	Office space	Equipment
<p>BOARD OF TRUSTEES</p> <p>II. Carry out the 2011-2016 Strategic Plan and plan ongoing strategic planning work.</p>	<p>Year 1</p> <p>1- Set priorities for implementing the strategic plan submitted by the Strategic Planning Task Force</p> <p>2- Develop an annual cycle to monitor progress of strategic initiatives and report progress to the Congregation.</p> <p>3- Unify processes that Ministries/Program leaders use to implement their strategic objectives (provide reporting forms, models for annual reports, resource materials, etc.)</p> <p>4- Ensure a long-range staffing plan and budget in support of the strategic initiatives.</p> <p>5- Plan ways to assist the laity in understanding the</p>		Forms and materials for Program evaluation/ annual reports

	<p>Core Values, the narrative of the strategic plan, and UAAA's potential as a large church.</p> <p>6- Schedule at least annual Board conversations and work around fundamental strategic questions such as: who are we, who is our neighbor, what are we being called to do or become?</p>		
	<p>Year 2- 5</p> <p>1- Follow the annual cycle for review/ revision of strategic initiatives.</p>		
<p>BOARD OF TRUSTEES</p> <p>III. Continue the transition to Policy Governance, staging to meet the governance needs of UAAA.</p>	<p>Year 1-5</p> <p>1- Monitor the effectiveness of the Board and its collaboration with the staff team as we develop in our capacity for policy governance.</p> <p>2- Provide and lift up information about Policy Governance to help the congregation learn more about it.</p>		
<p>FACILITIES & TECHNOLOGY</p> <p>IV. As good stewards of our resources, we need to use our land, buildings and technology effectively while implementing our program goals.</p>	<p>Year 1</p> <p>1- Establish a Technology Team to assess, coordinate, plan and oversee computers, a/v equipment, etc.</p> <p>2- Add modules to our Congregational Database software to enable remote access and additional tracking/analysis abilities</p> <p>3- Add / Upgrade computer hardware & software as needed.</p>	<p>\$3000 Database modules; \$2000 computer upgrades; \$3000 A/V improvements</p>	

	<p>4- Add new Audio-Visual (Multimedia) systems with improved “auxiliary” audio (for hard of hearing)</p> <p>5- Update and maintain a Master Site Plan.</p>		
	<p>Year 2</p> <p>1- Investigate transportation options and create a transportation plan (ride shares, zip cars, shuttles, purchase a van, etc)</p> <p>2- Continued upgrades/purchase of needed computer hardware and software as needed.</p> <p>3- Perform deferred maintenance on a planned schedule.</p>	\$5000 computers;	\$10,000 maintenance
	<p>Year 3</p> <p>1- Upgrade technology for projection of multimedia in SGD classrooms, Phifer Sanctuary and Jackson Chapel, including window/daylight shading</p> <p>2- Evaluate and if feasible, enable video streaming / conferencing with audio & video recording capability to (a) receive & project external events like UU General Assembly, and (b) to transmit internal events</p> <p>3- Improve outdoor gathering areas (beginning with the area outside the social hall) and the access trails to the outdoor worship area.</p> <p>4- Reconfigure offices and meeting space.</p> <p>5- Create a comfortable space (with appropriate furnishings) that could be used for Pastoral Care, Chalice Circles, etc.</p> <p>6- Perform deferred maintenance on a planned schedule.</p>	<p>\$40000 A/V;</p> <p>\$15,000 reconfigure office and mtg space;</p> <p>\$20,000 outdoor areas</p>	\$10,000 maintenance

	<p>Year 4</p> <p>1- Part 2 of technology for projection of multimedia in SGD classrooms, Phifer Sanctuary and Jackson Chapel, including window/daylight shading</p> <p>2- Refurbish parking lot and (Ann Arbor Saline Road) entrance.</p> <p>3- Perform any remaining deferred maintenance on a planned schedule.</p>	<p>\$25,000 multimedia technology;</p> <p>\$300,000 Parking lot;</p>	<p>\$10,000 maintenance</p>
	<p>Year 5</p> <p>1- Part 3 of technology for projection of multimedia in SGD classrooms, Phifer Sanctuary and Jackson Chapel, including window/daylight shading</p> <p>2- Perform any remaining deferred maintenance on a planned schedule.</p>	<p>\$25,000 multimedia technology;</p>	<p>\$10,000 maintenance</p>
<p>CULTURE</p> <p>V. Our staff and members have a good understanding of large congregations and embrace the benefits a larger size confers. All understand their roles in a larger, more structured institution.</p>	<p>Years 1-5</p> <p>1- Board of Trustees: Clarify divisions between staff/ membership roles in the programs of the congregation. The dialog should "focus on the role of laity as discerners, owners, governors and ministers".</p> <p>2- Board of Trustees and Senior Minister/CEO to identify and implement ways for our members to move to Large Church thinking and practice.</p> <p>3- Find our greater voice. Speak out through our Senior Minister/CEO and outreach programs in the community, state, UU District, and Nation.</p> <p>4- Board of Trustees and Senior Minister /CEO work together with the members of the Congregation to continue to build a culture of Abundance and Generosity so that we have the means to support our strategic goals.</p> <p>5- Board of Trustees and Senior Minister find ways to</p>		

	empower members individually and collectively to each find their own place, their own ministry in our work/ goals/ endeavors.		
FINANCE VI. Secure funding to implement the Strategic Plan Recommendations.	Year 1 1- Launch Capital Campaign to retire mortgage debt. 2- Financial stewardship planning for year-round stewardship. 3- Continued budget planning and monitoring.		
	Year 2 1- Monitor Capital Campaign 2- Initiate year-round stewardship plan;		
	Year 3 1- Monitor Capital Campaign 2- Review Year-round Stewardship Plan;		
	Year 4 1- Conclude Capital Campaign; 2- On-going continuous stewardship cycle		
	Year 5 1- Evaluate effectiveness of changes in finance and recommend actions.		

APPENDIX B. "FAITH IN OUR FUTURE: WHENCE, HOW AND WHITHER"

*A Sermon offered for the First Unitarian Universalist Congregation of Ann Arbor
By The Reverend Gail R. Geisenhainer
October 30, 2011*

In a world where we continue the ancient and barbaric practice of teaching our children to kill and calling it peace keeping..., who will rise up and say, "Enough! We know we can do better than this?" Who will insist that we turn away from declaring the non-personhood, the non-value of people who are different than we are? We call this "othering." Who will do the work of insisting we value the inherent worth of each person? Who will rise up and decry the bankrupt theologies of dominion that guide us to pillage the planet to benefit the few and subjugate the many? Who will do all the work of evolution and revolution in our schools, in our law enforcement agencies, in our armies, our offices, our playgrounds, our movies, in our homes? Who will rise up and decry the evil that guides our legal system to incarcerate so many of our young men, our black men?

Day by day we are learning who will rise up to challenge our banking system, our evil practices of engorging the excesses of the wealthy while eviscerating the well-being of the poor. In our time, this holy work is called "Occupy Wall Street." It is unfolding and bursting forth like resurrection all over the planet. Yes, there is the energy of Spring, the promise of new life, the bursting open of hope.

Occupy. Of the thousands of passionate, wise and funny posters, I was struck this week, by one. It read, "Occupy Yourself, One Breath At a Time." Wise advice. An important place to start. But a dangerous place to aim for. Occupy yourself, one breath at a time. It's good advice for the beginning of a journey of commitment. But it will not bring the revolution. The glories of individualism are an outdated notion. It's very frontier, very 19th century, to think we can do what needs doing by ourselves. To think we can making changes for ourselves and that is enough..., is wrong. And it is not enough. It is not sustainable.

Occupy Wall Street. Those of us who have been in the streets for our beliefs know how important it is that the agonies of our times are being exposed, named and claimed in the streets, in the press, on the internet. Evil unexposed is evil empowered. Truly, we are as sick as our secrets. And our neighborhoods are as evil as our shadows. Those of us who have lived our values in the harsh light of public witness know that we can shine light into hidden places and we can expose evil.

But we also know that the solutions to complex problems do not get built in the streets. There is a time to tear down walls of isolation, walls of secrecy, walls that protect the evils of privilege and unjust power. The street is exactly the place to expose those monstrous imbalances of injustice. But very few of us want to raise our children in a tent in a public park during a war, during a protest.

Here is the challenge. WE must take to the streets and turn over the tables of the money changers. WE must expose the evils of our time. And, yet, babies come, and they must be protected. Lasting solutions to injustice and imbalance and evil must be built at home, in our neighborhoods, in our

daily lives. Yes! Occupy! Occupy in the public square, on the internet, in any media you can commandeer. Then come home and build the lasting change you envision.

That's the challenge, the conundrum, the discipline of balance. We need revolution. We need massive disruptive creative revolutionary change. And we need conservation, we need gardens and children, reflection and memories. We need both to survive. We need innovation and progress. And we need conservation of enduring truth, a nurturing of the best of the past. That is the sacred trust of religious community, to heed the voices of prophecy while we respect the wisdom of ancestors. We seek to establish "a freedom that reveres the past but trusts the dawning future..., more."

It is a balance with a preferential option for a future that allows peace, justice and prosperity for all. The enduring role of religious community is to live right in the epicenter of that conundrum.

We innovate and we conserve. We live in that tension. Even while the nature of those tensions is changing radically. As we have greater access to the lives and events of people all around the planet, our own lives are growing exponentially more complex.

We live in increasingly complex times, in an increasingly complex world. We no longer have the luxury of thought to expect that decisions made in one place do not effect others in different places. The bumper sticker wisdom is true, "we all live downstream." We live in a web of interdependence that requires us to embrace complexity and diversity in order to survive.

And we can do that. It cuts against the grain of much of the liberal wisdom of the past few centuries. But we can do this. We can forgo the luxuries of individualism. We can turn away from the ethics of social Darwinism that are neither ethical nor reflective of Darwin's research and conclusions. We can redefine the paradigms of success. Power-over is not sustainable. Power-shared is what Darwin witnessed. Survival of the most fit is not a bloody dog fight where only one remains standing. It means that our most fit genes, our strongest mutations, are the ones that survive and reproduce over time. It does not mean we fight to the death to hoard meager resources. In fact, Darwin's research reveals cooperation between species. The famous finches he studied were shown to cooperate in times of food shortage. Oh, how I wish we could emulate the wisdom of those birds! A world of self-absorbed competition and greed is not sustainable. It is not enough that a very few become incomprehensibly wealthy.

We have enormous challenges facing us in the 21st Century. Government leaders around the world are misdirected into the practice of using public office for the illegal appropriation of funds for personal gain. People starve as a result.

In our own government, tortuously misguided religious teachings have brought an apocalyptic theology into our foreign policy. This misdirected apocalypticism demands war, insists on world destruction, as proof of a set of bizarre and unnatural theological truth claims. It is not God's will that we fight to the death to preserve the tenets of any school of religious thought. Who will challenge that broken and dangerous theology in the public square? Who will be equipped to take that on?

Recent scientific studies have shown that a diet largely of meat and dairy, short on plant, is causing an epidemic of early onset of puberty in little girls. One hundred years ago, menses commonly began at age 17. In my Wonder Bread and baloney, *Leave It To Beaver* times of the 1950's

and 1960's, that average age had declined to 13 or 14. Now, today, in our country, African American girls are reaching puberty by age 8. This is causing havoc with their bone development and resulting in shorter than average projected adult heights., and gosh only knows what other medical mayhem.

And I plead with you to help me respond. Who will care? Who will rise up with real wisdom about human sexuality and the dignity of children? Who will be schooled in the intersection of sexuality education and mindful eating?

There is no more fundamental religious activity than to feed one another. In our time, who will have access to whole and nutritious foods? Who gets access to vegetables, to healthy and affordable food choices? Where are the farmer's markets for the poor? Who cries out to name the inequity and the iniquity that leaves black girls with diets of meat and dairy in the maelstrom of biological changes that threaten their well-being in such crushing ways?

We all know of the need for energy sources that are sustainable, that do not pillage the very earth which sustains our species. Who will pursue sustainable energy? Who will write the regulations to keep it safe, to insist that affordable energy is available to all? For whom will care of the planet be a religious value? Who will get taught dominion? Who will get taught stewardship?

My response to these discomfoting questions is not tricky or unpredictable. Who will respond? We will respond. We will be equipped with a theology of stewardship, interconnection, mutuality and sustainability. Unitarian Universalism teaches the wisdom we need to make the changes we need to make in the 21st Century. Most especially, we teach the wisdom to know we are constantly in need of seeking new understanding and new truth. The wisdom of previous millennia will not get us safely into the next millennium. We need the discipline to "revere the past but trust the dawning future more."

All that is what the emerging strategic plan for this Congregation would guide us to do. When we left Washtenaw Avenue 12 years ago, this Congregation had decided to be a large and relevant presence in the religious issues of our age. We decided to be large, to invite many more folks to walk with us. To be present in the lives of more children. It is true, small churches will continue to be attractive to many folks. They are comfortable for many folks..., and, they will continue to be largely irrelevant in the larger public discourse.

As this century unfolds, those Congregations who can meet the challenges of fundraising, building increasingly complex organizational structures while fostering intimacy and meaningful connections among members will survive to become large. Sustainably large congregations will be positioned to make a difference in all the ways we value.

Large congregations will contribute to shaping the education and nurture of children to meet the unique demands of the next century. They can pioneer sustainable, mindful eating, food distribution, local food assistance across socio-economic boundaries. They can move the public conversation around sustainable sources and uses of energy and natural resources. And large Congregations will continue to have a formative effect on shaping a social ethic that insists on justice for all. And large Congregations will have a critical role to play in turning our governments away from a theology of dominion and incarceration toward a practice of stewardship and the respect for persons.

We can be a part of this. We can make a difference. Through our careful work of listening to each other. From Chalice Circles to our Strategic Planning Task Force, we are shaping a future for our Congregation that will support life and hope and possibility out beyond the edges of our own personal

needs. That is why we are all asked to sign on to the Annual Pledge Drive. That is why our Strategic Planning folks are working so hard to bring us a focused and relevant plan. That is why it is important to plan to come to our Congregational meeting in January, to be a part of this conversation as we reach out to bring our values alive in the world.

None of us can do this work alone. All of us together, can bring hope out of the mountains of despair.

May It Be So, Each Time We Gather

APPENDIX C. STRATEGIC PLANNING PROCESS

1- BOARD CHARGE TO THE STRATEGIC PLANNING TASK FORCE

The First Unitarian Universalist Congregation of Ann Arbor Board Charge from Board of Trustees to the Strategic Planning Task Force

The Charge from Board of Trustees of the First UU Congregation of Ann Arbor (UUAA)

The Strategic Plan Task Force is charged with the task of producing a Five Year Strategic Plan by conducting a nine month process that will identify priorities and desired outcomes and resources required to implement it.

Strategic Plan Task Force Process

1. Gain approval of a plan for executing a process that will identify priorities and desired outcomes to be included in the First Unitarian Universalist Congregation of Ann Arbor Five Year Strategic Plan. This plan will refer to and build on the Sankofa – Appreciative Inquiry efforts and articulate the goals of the Strategic Plan including:

a. Describing a plan for congregational growth.

Discussions will focus on strategic efforts to continue and extend outreach and welcoming activities supporting individuals interested in deepening their relationship with our congregation.

b. Identifying program, ministry, staffing and capital requirements.

These activities will engage Senior Minister and her team and the members of the congregation in discussions about program and ministry needs, five-year goals, and specific ways to strengthen and add new program and ministry action plans to meet those goals.

c. Identify First UU needs essential for planning and launching the Capital Campaign of 2012.

The end product document of the Strategic Plan Task Force will provide information (directions and identified needs) essential in the planning for the Capital Campaign of 2012.

2. Form a Strategic Planning Task Force (in March) of 10-12 individuals with the interest and skills to develop the plan. The members of this Strategic Planning Task Force will be recognized and respected leaders who have the abilities to recruit volunteers and coordinate the efforts to complete the Strategic Plan. The members will have the appropriate skill sets needed for the task at hand. The roles of the CEO (Senior Minister) and the Board liaison will be critical to the success of this project.

2- STRATEGIC PLANNING SETTING AND CONTEXT

Setting and Context for the "Faith in Our Future Strategic Plan of 201"

By Terence Madden, Co-Chair of the Strategic Planning Task Force

Presented to Board of Trustees, Program Leaders, and members of the Strategic Planning Task Force at the First UU Congregation of Ann Arbor on October 15, 2011

Every story has a setting and a context in which the story is told. Here is a description of our immediate past and where we are in the life of the First UU Congregation.

A little over five years ago, we celebrated the retirement of Kenneth W. Phifer, our Senior Minister who served our congregation for 25 years. The First UU Congregation of Ann Arbor had been a pastoral, then a program church, and even technically a "large church" congregation during his tenure. During Ken's last 15 years of service, the Board of Trustees was responsible for the supervision of the Senior Minister who in turn with the Board supervised the staff. During this time the congregation grew and we decided to move to our present location. The building and the location were new and unfamiliar, but the organizational structure and the key leaders were settled and familiar.

During his tenure, Ken Phifer was recognized as our spiritual leader. When he preached on Sunday morning, Ken was ably accompanied on the piano by Sara Albright, who would serve as our Music Director for over 15 years.

The Religious Education program was thriving under the direction of our energetic DRE, Laura Spencer, who viewed religious education as going from womb to tomb. She developed a model Pre-Kindergarten – 12th grade curriculum as well as promoting adult education. Laura also provided stability by serving our church for around 15 years as well.

A year or two after Ken retired, our experienced Office Manager, Janet Haynes, would also be ending her 15 year service to the First UU.

During Ken Phifer's last 15 years in the pulpit, we experienced changes. We gained new members and lost older congregants. The Board members changed, but the experienced First UU Senior Minister and staff as well as the church structure was in place, understood, and accepted. We had achieved stability.

In August of 2008, Rev. Gail R. Geisenhainer began her tenure as our Senior Minister.

What changes had occurred since Ken Phifer left three years before?

"Large Church" Congregation - Gail arrived into a congregation which was now by UUA standards definitely a "large church" congregation. With the larger size came greater demands requiring a different allocation of time and resources. Many members of the congregation still expected services that could be provided in a program church but not in a large church. Both the member's lack of knowledge of what services could be provided in this larger context as well as reluctance to change created conflict.

New Governance Structure - A large church requires a new governance structure. We began to adopt and revise what is called, "Policy-based Governance." With Policy-based Governance comes

changes in the relationship between the Board and Senior Minister as well as with the Senior Minister and the congregation. Gail was to be the Spiritual Leader as well as the CEO.

New Professional Staff. No one from Ken Phifer's experienced staff remained. Over this three year period we had two very different Interim Ministers, Barbara Childs and David Keyes. Most of the staff had only been hired by David Keyes, the year before Gail arrived. Gail needed to learn the First UU history and culture from inexperienced staff. She needed to define the staff roles, make assignments, while building trust within an evolving organizational structure and governance model that was in transition.

I have been an active member of the First UU of Ann Arbor through all of these change and it has taken me a long time to realize the impact on the congregation (and on myself) of our becoming a "large church" congregation at the same time we have changed Senior Minister, and the whole professional staff, and at the same time switched to a new governance structure.

These are huge changes.

Until the dust has settled from our three major transitions and we can envision ourselves in a new age, the whole congregation will remain fragmented. Our Congregation will achieve less than its full potential.

But there is hope. We, the members of the STRATEGIC PLANNING TASK FORCE, have faith in our future. We are developing a Strategic Plan in which we boldly state the challenge facing the First U Congregation of Ann Arbor, namely that we must fully become a "large church" congregation. Successfully facing that one challenge will direct coherent actions that will bring our congregation together into a vibrant community.

What's so different in a "large church" congregation?

Let's take the Social Justice program as an example of what could be different.

In Holy Conversations by Gil Rendle and Alice Mann, they identify four Religious Cultures of a Congregation:

- Sanctuary
- Evangelistic
- Civic
- Activist

1. In a "Sanctuary" culture, the members of the congregation gather for support from the outside challenges and conflicts of the world.
2. An "Evangelistic" culture wants to spread the good word by a select chosen few.
3. A "Civic" culture promotes the public good through involvement with existing social and economic institutions. Internally, it provides a forum in which social justice issues can be discussed and debated in a way that enables individual members to act responsibly.
4. An "Activist" religious culture – the congregation speaks out on issues and engages in collective action, working for social change.

We currently act like a church with a “Civic” style of action. We promote “individual” awareness. We can do more. Our larger size provides us with the clout to speak with conviction in one, loud, congregational voice that could make a difference for Social Justice.

We have faith in our future that we will fully become a “large church” congregation.

We have talented, creative, hard-working members willing to take on leadership roles as members of the Board of Trustees, the Strategic Planning Task Force, and as teachers in our Spiritual Growth and Development classes and as Program Leaders.

We have faith in our future that we will fully become a “large church” congregation.

We have a talented, creative, inspirational leader in the Rev. Gail R. Geisenhainer. She is assembling a team of dedicated professionals who will coordinate and supervise the efforts needed to lead us forward.

We have faith in our future that we will fully become a “large church” congregation.

The First UU Congregation of Ann Arbor is a diverse community of UUs with common purpose who together are keeping the UU community and the various programs/ ministries of the congregation moving forward.

At the First UU Congregation of Ann Arbor, we have faith in our future.

The Strategic Planning Task Force was formed in March, 2011 with a specific charge from the Board of Trustees and a due date of December, 2011. Terry Madden and Bruce Gibb were selected as co-chairs and very quickly recruited eight other members of the First UU to join the team. We were joined by two representatives from the Board of Trustees, as well as the active participation of our Senior Minister.

The members of the Strategic Planning Task Force 2011 were: Jim Breck, Bob Dinan, Kathy Friedrichs, Bruce Gibb, co-chair, Bob Hospadaruk, Terry Madden, co-chair, Paul Morris, Margaret Pekarek, Leigh Robertson, Sandy Simon; Board Liaisons: Joan Burleigh Tom Reischl; Senior Minister: Rev. Gail R. Geisenhainer.

The Strategic Planning Task Force (SPTF) held its first meeting on March 22, and met the 2nd and 4th Tuesday of the month from April – November with additional meeting dates as needed.

The Unitarian Universalist principle number 5 guided the STRATEGIC PLANNING TASK FORCE i.e. “The right of conscience and the use of the democratic process within our congregations and in society at large.” Rather than follow the typical corporate model of strategic planning which is normally done by a small professional planning group, then approved and implemented by top management, we decided to build the plan from the bottom up and the top down. We started by engaging the program leaders to determine the condition of their programs/ ministries, their aspirations, their needs, and how they benchmark their programs. The democratic principle then dictated that we engage everyone in the congregation who had an interest in planning for the future to get their needs and aspirations. With the information from these two sources, we met again with the program leaders to set specific five-year goals and annual objectives. These goals and objectives were vetted by the ministers and staff to be sure they were consistent with their mandates and with the Board of Trustees to be confident that it was consistent with their charge.

More specifically, we organized the Strategic Planning Process into the following seven phases:

- Phase I. Describe the current state of the Congregation and its programs/ ministries.
- Phase II. Engage the membership in a “Congregational Conversation” to develop a five-year vision for the Congregation.
- Phase III. Review the vision with the program leaders and ministers and have them formulate program goals, plans, and resource requirements sequenced over 5 years.
- Phase IV. Integrate program plans into the strategic plan, resolve conflicts and differences, and present the outline of the strategic Plan to the Board of Trustees, Program leaders, and Professional Staff.
- Phase V. Incorporate final thoughts into the plan and write the final Five-Year Strategic Plan while continuing to consult with Board of Trustees and Senior Minister on all aspects of the Strategic Plan

Phase VI. Submit the First Unitarian Universalist Congregation of Ann Arbor “Faith in Our Future” Strategic Plan 2011 to the Board and Senior Minister

Phase VII. Celebrate!

Timeline

2011

March 12	Co-chairs participation in a discussion with Board about the general nature of the project and process integration with the future Capital Campaign
April 26, 27	SPTF Interviews with Program Area Leaders
May 14	Congregational Conversations with Program Leaders Board members, Senior Minister and Professional staff
July 31	Survey of Congregation at the two Sunday Services
August 23	SPTF Goal Setting with Program Leaders
Sept. 6	Co-chairs update to Board of progress of Strategic Plan
October 15	Presentation of Outline to Board, Professional Staff, Program Leaders
Oct. 30	Sunday Service with Strategic Planning theme
Dec. 6	Formal presentation of Strategic Plan 2011 to Board of Trustees
Dec. 17	Chautauqua with Board of Trustees and Senior Minister to further explain Strategic Plan and to help to identify next steps

2012

Jan 22	Congregational Meeting open to whole congregation
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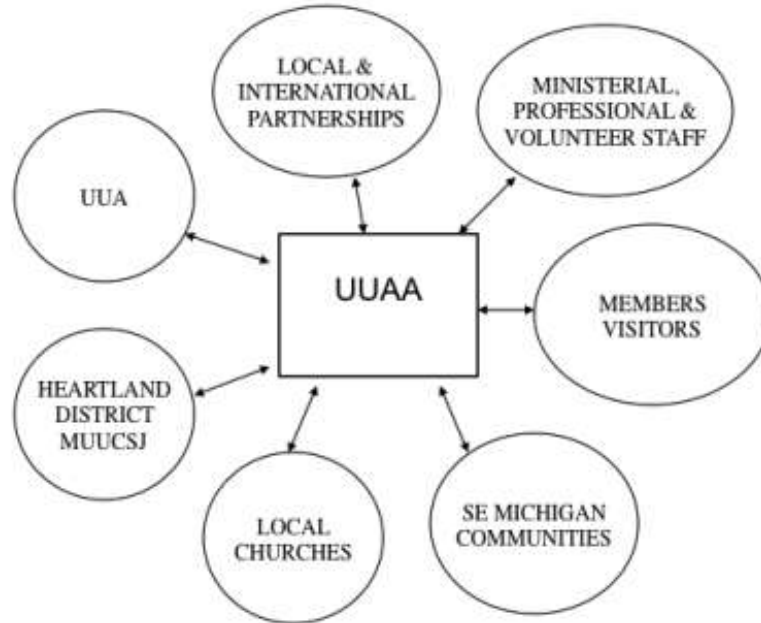
APPENDIX D. SYSTEMS MODEL ANALYSIS OF UAAA

1- CONGREGATIONAL DIAGNOSTIC FRAMEWORK

Strategic planning for organizations is often based on a SWOT analysis. This means that strategy is based on an analysis of the internal strengths and weaknesses of the organization—the S and W—and on the external opportunities and threats—the O and T. In our examination of the First Unitarian Universalist Congregation of Ann Arbor (UAAA), we started with the external opportunities and threats using a systems model. The diagram below shows the various stakeholders in our external environment to whom we contribute and from whom we receive contributions. These in turn are embedded in the political, economic, social and religious sectors of the larger US society. Rev. Gail eloquently identifies the needs and challenges in the larger society in her sermon reproduced in Appendix B. Our commitment and responsibility to meet these challenges are contained in our Principles, Values, and our End Statements.

We engage these issues through our relationships with our external stakeholders: the UUA, the Heartland District of the UUA, the Congregations with which we have partnerships in India and Transylvania, the Michigan Social Justice Committee, other local churches, and the populations of the cities, towns, and villages of Southeast Michigan. The other two principle stakeholders are our members and our ministerial-professional-volunteer staff.

UAAA Stakeholders

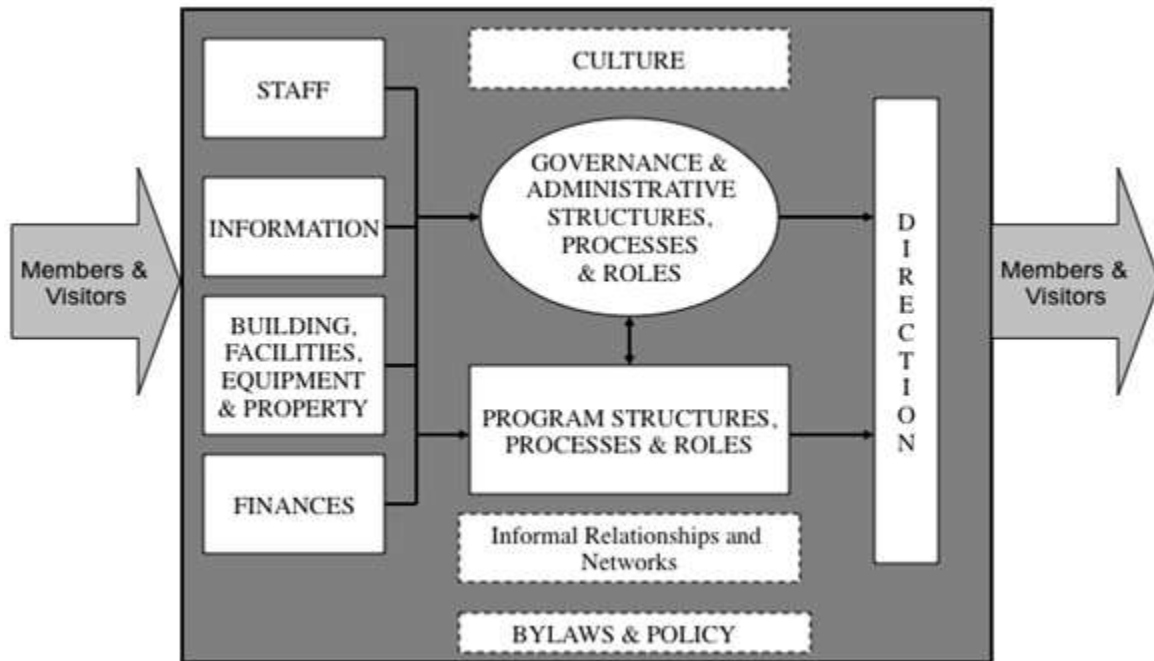


2- IDEAL CHARACTERISTICS OF AN ORGANIZATION

The systems framework that follows, shows the key areas of an organization and the characteristics that make it effective. This describes an ideal that can be used to assess the strengths and weaknesses of the UUAA.

In general, as a religious congregation with a large church population, we need to develop the structures, processes, and capabilities of serving this population. Effective and efficient social systems regardless of their type can be described using the ten elements presented in this section. This framework can be used to analyze a particular program within an organization and the organization as a whole. The elements of UUAA as a whole are identified in the following diagram.

Elements of the UUAA Community



Organizations thrive when they have the following characteristics.

A. Direction

The organization as a whole and the program areas within it all have clear goals and objectives which guide their operations

B. Programs

The organizational goals and objectives are achieved in programs/ ministries where the work of the organization is carried out. The program staff and leaders have formally

described processes for achieving these outcomes that they continually improve based on learning. To enact these processes, staff have role descriptions that include the outcomes for which they are responsible, the roles they play in the processes, their authority and accountability, their relationships and the resources that they have to produce their outcomes. Program staff members have the means of measuring and tracking the quality and quantity of their program implementation and accomplishments. This data allow them to adjust their implementation as needed. And finally, all programs/ ministries must have the resources they need to activate their processes: staff, information, facilities and equipment, and finance.

C. Governance and Administration

In the best organizations, the whole and the specific programs/ ministries have optimal governance and administrative structures. The organization governance structure represents the whole organization; each program also has a governance structure which brings together its supporting constituencies to determine policy, ratify goals and objectives, and evaluate outcomes.

D. Staffing: ministerial, professional, and volunteer:

Successful organizations have staff for all program and governance structures; The staff members are competent, committed, and confident. There are structures and processes for acquiring, onboarding (including enculturating), training, evaluating, compensating, and releasing staff.

E. Information:

Many types of information are required for the effective functioning of an organization from blueprints of the building, teaching materials for classes, congregational data bases which are searchable, program evaluations, etc.

F. Building, facilities, equipment, tools and land:

This includes all that material aspects required by the organization to function effectively. Ideally, the buildings, facilities, equipment, tools and property are adequate to the program and institutional requirements and well maintained.

G. Finances:

The lifeblood of an organization is its financial resources. Ideally there are adequate financial resources to support all activities at the standard of excellence that are consistent with the organization's culture.

H. Culture:

The culture of an organization includes the beliefs and assumptions which underpin its design and functioning.

I. Community: Social Relationships and Networks:

All of the prior elements can be formally designed. Social relationships and interpersonal networks emerge in self-organizing patterns. Ideally, these relationships are established and evolve consistent with the culture of the organization and its goals and objectives.

In general, as a religious congregation with a large church population, we need to develop the structures, processes, and capabilities of serving this population. We are much like adolescents who have grown but do not yet have our thinking and behavior fully under control and capable of effective and efficient action. Our capacity to master our strengths and deliver what our members need and want must be further developed. The strengths and recommendations are listed by element as described in the foregoing diagnostic framework.

NOTE: Some of the recommendations mentioned in this section are not in the RECOMMENDED ACTIONS in section IV. The Actions recommended in Section IV were prioritized based on the leverage provided to support the congregation's goal, the urgency of need, and a realistic projection of our ability to fund the action.

A. Direction

Currently we are strong in having a still very relevant Sankofa vision to guide our development efforts. Our values and end statements are consistent guides for our institution and programs/ministries. To complement these strengths, this plan includes congregational and program goals for the next five years and annual objectives for each year. (see appendices).

We recommend strengthening this aspect of the UUAA by having the board and administrative leadership formally establish an annual planning process in which institutional and program results are evaluated and objectives of the subsequent year are set (see section VI. Evaluation and Future Planning).

Since we are engaged in the process of building the processes, structures and capabilities of the Congregation, we are engaged in change. We suggest that

the leadership define change targets each year and establish a clear methodology for managing growth and development.

Regarding direction, the Alban Report recommends that the Board needs to conduct "strategic conversations" about: "An annual vision of ministry should be created to answer the question, 'In what new and different ways will we transform lives in the next one to three years?' Build this into policies." "Focus on the role of laity as discerners, owners, governors and ministers". Conduct "strategic conversations—who are we, who is our neighbor, what are we being called to do or become?"

B. Programs/Ministries

We have many successful programs/ministries with wide member involvement as participants, and in leader, developer, and operating roles.

Some areas of concern are the number of programs/ ministries we have. They need to be examined with the possibility of combining some to increase their impact. All programs/ ministries identified the need for communication processes, i.e. publicity, so that all interested in programs “get the word”.

Program delivery processes are not described and the roles defined so that volunteer staff can quickly understand their roles and assess their performance. Programs/ ministries in general lack measurement and evaluation processes to assess objective and goal achievement.

Finally, there is a great opportunity to synergize across programs/ ministries. At the present time, programs function independently of each other. This lack of cross-program integration does not take advantage of leverage across programs/ ministries, for example: worship with social justice with spiritual growth and development with land use with outreach to stakeholders.

C. Governance and Administration

The Board of Trustees has made great progress in establishing Policy Governance as the operating paradigm for the Congregation. We encourage the Board to continue this effort until the system is fully implemented with particular attention to its application to a large church.

On the administration side, there are effective vertical administrative structures in pastoral care, men’s programs, Spiritual Growth and Development (SGD), Interweave and Chalice Circles. However, there is a lack of mid-level, coordinator positions in some areas which creates an impossible span of control for the ministers. For example, Rev. Evens has over 20 “direct reports”, 5 areas have leaders/ coordinators, 4 ministries do not: multigenerational, women’s, recreation, and identity which have 15 plus areas. This GAP in the administrative chain needs to be closed.

Another potential benefit can come from explicitly focusing on coordination across programs/ ministries. There appears to be a lack of a structures or processes in some areas for those reporting to ministers and program staff to communicate and coordinate across program areas.

Coordination is only one instance of the need to establish a common set of administrative processes for communicating, meeting management, making decisions, coordinating, planning, communicating, solving problems, evaluating, etc. This commonality allows volunteer staff to reduce the time it takes to get up to speed when they move to take over new assignments. These processes can be also be taught in the leadership development program.

People are required to implement processes and these processes have defined roles to be enacted. Once these processes are defined as suggested above in the programs section role descriptions need to be defined which are consistent with these processes (AR). Sample role descriptions are included in section VI.

D. Staffing: Ministerial, Professional, and Volunteer

After a period of transition, we now have an excellent ministerial staff, highly competent and motivated professional staff, and dedicated lay volunteers. The leadership development program is starting to provide candidates for volunteer leadership roles.

There is a serious deficiency, however, which hobbles the effectiveness of the ministerial staff. The minister's ability to function efficiently is inhibited by the lack of professional administrative support. Program staff also needs administrative support. We recommend that this need be filled as soon as possible.

The current role of Spiritual Growth and Development (SGD) director is a full time staff position but the current director is only three-quarter time. This role as currently defined is very complex and requires the director to function at multiple levels, in effect wearing the hat of director and the hats of program heads at the same time. We recommend that the current directors be moved to full-time or another director be engaged. We also recommend volunteer leaders be called to fill positions just below the director.

One of the most active ministries in the Congregation is in social justice. However, the great number of programs/ ministries which diffuses the efforts of the volunteers. These could be focused on fewer programs/ ministries that would have a greater Congregational impact in the community. To accomplish this we recommend that professional or volunteer program coordinator for social justice.

All programs/ ministries indicated the need for more or better "Communications." We recommend that a full-time communications director be established to serve the whole congregation and the needs of the multiple programs/ ministries. The role would be responsible for program and congregation publicity, external media relations, the UUAA website and publications.

Finally, we echo the advice of the Alban report by recommending that a performance review process be established. Prior to operationalizing the process, however, the roles and performance expectations need to be clearly defined.

E. Information

Much valuable information is currently available to our members. We have: good diagrams of our current structures (wall charts); bulletin boards for events in the building; an excellent library; a historian/archivist that maintains records on site and in Bentley Historical Library; information about how to schedule rooms and buildings; information displays about the Congregation in the hallway; hymnals and music books are in good shape; and the Board is making progress in developing a complete policy manual.

We are severely hampered, however, by not having a comprehensive codified congregational data-base and data base management processes and roles which would allow for program planning and recruitment of members for participation as volunteers. We recommend that this be a high priority institutional objective.

As indicated in the programs section, having institutional and performance indicators which signal when problems are developing are essential for effective functioning and problem solving. It is like driving a car without a dashboard. We recommend building this information system at the appropriate time.

Other areas in the information category that need attention are: formal program evaluations, revision of the personnel manual, and formally described administrative processes and procedures.

F. Building, Facilities, Equipment, Tools and Land

We are proud of our beautiful functional building and the great potential our property has as a resource for spiritual development. In this area, however, we need to reconfigure current space and provide equipment to accommodate staff additions.

The Sanctuary and Fahs Chapel need audio visual equipment

- Equipment for the live streaming of worship services and other important events
- A permanent projector, ceiling mounted screen(s)
- Videotaping equipment
- Curtains for all windows and skylights Jackson Chapel
- Improve acoustics to make room useable for small worship and meetings
- Window shades to aid temperature and glare control
- Expand choir seating
- Add sound capacity for outdoor worship In field south of Social Hall and in the Outdoor Sanctuary
- Make Outdoor Sanctuary handicapped accessible (upgrade paths)
- Site planning team priorities and recommendations

G. Finances

We have dedicated members who pledge annually to support the Congregation and our financial processes are defined. But we see the need to develop: an annual budgeting process based on program objectives for all programs/ ministries. This would entail a shift from our current line-item budget.

We recommend that we organize a Capital Campaign to pay off our mortgage and free up the interest payments for institutional use. This would allow us to restore and increase endowment funds to fulfill the commitments we have made in the past.

We also see the opportunity to enhance our Stewardship program by increasing the congregation's understanding of our overall finance philosophy/approach.

H. Culture

The explicit description of our culture is contained and rehearsed in our Unitarian Universalist Guiding Principles, First Unitarian Universalist Congregation of Ann Arbor Core Values, and the Covenants we have and commit to each other each week.

We have also been able, in the words of our Sankofa Vision, to find a “dynamic balance of both respect for the individual and a commitment to community, both the rational and the emotional, the objective and the subjective, the practical and the spiritual, the theistic and the humanistic, the sublime and the secular, the serious and the humorous, and the planned and the spontaneous.”

In addition in response to the Alban report, the staff has created a set of principles which govern their relationships to foster a “nurturing and respectful culture.”

As we begin to make changes to create the structures, processes and capacities to support being the large church that we have become, we need to explicitly improve our congregation’s understanding of large congregations and how membership roles change with growth in size so we can manage members expectations as progress occurs. This will require us to address the anti-hierarchical attitude of some members and help others find a place of intimacy and community. Hopefully they will see the potential contributions large congregations can make for members and the society at large.

I. Community: Social Relationships and Networks

Our worship services are strong and inspiring. Our coffee hour reinforces informal relationships and provides the opportunity to establish new ones. Strong connections are being developed through our small group ministry, affinity groups, and Round-Robin dinners.

However, we recommend that we be aware that some people feel lost in the large numbers of members and the number of people that they do not know. We need ways of knowing leaders and program needs. We need to find ways to seamlessly integrate new members into relevant programs/ ministries and develop a feeling of responsibility of all member to welcome visitors and new members.

We also heard a cry for more regularly scheduled Congregation-wide social/recreational activities where people can informally meet and build relationships. While these needs provide a potential agenda for the development of the capacity of the Congregation to provide programs/ministries of excellence over the next five years, we have selected five capacity building areas which we recommend be the specific focus: Staffing, Governance/ Administration, Facilities and Technology, Culture and Finance. These areas are not only essential, they leverage other critical areas.

The strategy we recommend begins with providing administrative staffing and preparing members and installing them into leadership positions to fill the Governance/ Administration gap. A parallel or closely following effort needs to be made to change the Culture of the members of the Congregation so that they understand and believe in the benefits and contributions of a large church. With a Congregation thus unified in their commitment to the use the power of a large church for the members and the society at large, we believe they will be willing to contribute financially to bring it into its fullness. The empowerment of needed equipment and technical tools will leverage these resources into a more effective and efficient operation.

NOTE ON STRATEGIC PLANNING DATA

During the strategic planning process the Strategic Planning Task Force collected a great deal of valuable data from congregants, program leaders and staff. The task force would like to A- Make sure that everyone's input is heard and valued and B- Make sure that all ideas are available for future planning. A thorough, organized compilation of our data will be made available to the FIRST UNITARIAN UNIVERSALIST CONGREGATION OF ANN ARBOR Board of Trustees in January, 2012.