

# Strategic Plan 2017-2020

First UU Church of San Antonio



## MEMBERS

Stacy Barnwell (replacing Heather Hedquist as of Sept 13, 2016)

Megan Janzen

David Rodriguez

David Ringer

Rev. Dr. Joshua Snyder

Last Edit Date: May 7, 2017

## MISSION

INVITE all into caring community

INSPIRE spiritual growth

INVOLVE everyone in working for a peaceful, just and free world

## VISION

At First Unitarian Universalist Church of San Antonio:

- We stretch ourselves and encourage each other to new intellectual and spiritual heights. We care for each other in times of joy and sorrow.
- We love and accept children and youth for who they are. We nurture and stimulate them to grow into their fullest potential.
- We welcome visitors and seekers with radical hospitality. We connect with them to create relationships of caring, transformation and spiritual growth.
- We are a force for love and justice in the greater San Antonio community. We proactively engage others to work for the common good.
- We support and challenge fellow congregations in the UUA. We strive to live our UU principles and values with excellence.

## EXECUTIVE SUMMARY

The Strategic Planning Committee (SPC) presents a suggested Strategic Plan for the next three years, based on a year of gathering input from the Congregation. This was a committee on a mission; looking for the patterns and seeing where this would take First Unitarian Universalist Church of San Antonio (First UU). The process we followed (outlined below) led us to identify four **FOCUS AREAS**, with two **GOALS** within each area, and some **OBJECTIVES** for these goals where appropriate. Through our process, the focus areas that rose to the top were:

- HOSPITALITY
- LEADERSHIP
- STEWARDSHIP
- COMMUNITY OUTREACH

## MISSION/CHARGE

Per the bylaws of First UU, the Board President can establish a Strategic Planning Committee of up to four church members to act as a steering committee for the strategic planning process. This Committee began the process with the mission of providing a Strategic Plan for the next 3 years, with the expectation that the goals could change during that time. The plan was to be visionary rather than tactical in the suggested plan; once accepted by the Board, the initiatives and tasks will be developed and delegated by the Board. This plan replaces the previous 2013 Long Range plan. The plan offered here is subject to approval and periodic monitoring by the Board.

## HISTORY/PROCESS

Upon first meeting, the SPC reviewed the 2013 Long Range plan as a point of reference. The nine priorities from the 2013 plan were not all attained, in part due to the transition period from Rev. Bret Lortie's departure to the arrival of Rev. Josh Snyder. One of the priorities that was met was the unveiling of a new website design in 2014.

The overall process was guided by materials from other Unitarian Universalist congregations, Rev. Josh Snyder's experience, Rev. Bill Clontz' analysis of our church (Next Steps Visit Report) and the book Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations (Randle, Mann, 2013).

The Committee first conducted a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis within our own group to identify the **FOCUS AREAS**. Our strengths included things like our wonderful music program, the strength of our volunteers, and our campus. Our weaknesses included many campus repairs, limited sound system, lack of staff and more classroom space. Our opportunities included reaching out to the large Mexican-American population in San Antonio, tapping into our young adults, and more involvement with the many community organizations like COPS/Metro. Our threats included an unbalanced pledge pyramid, aging population, and having enough diverse programs for everyone.

From this SWOT analysis we focused on the weaknesses and opportunities and came up with the focus areas that would drive our future analysis: **Radical Hospitality, Leadership Development, Stewardship, and Outreach**.

**Radical Hospitality:** This is part of our mission to “invite all into a caring community” and to “involve everyone.” Our Unitarian Universalist faith calls us to ensure that everyone is fully able to participate in our worship services and our church activities. This means making room for them to bring their full authentic selves into our community. It is vital to make sure that every effort is made to meet, greet and follow up with all newcomers on a consistent basis. This is also part of our vision’s third end.

**Leadership Development:** Our church is a place where people have the opportunity to share their gifts and talents in unique ways. By encouraging people to be in service to others through leadership, we help them deepen their spiritual life. At the same time, without leaders in the church there would be no one to carry out our mission and vision. We need to develop, retain and commit to our church leaders for the future of our church. This is part of our vision’s fifth end.

**Stewardship:** We rely on the financial commitment of our congregation to keep our church alive. The glaring problem that we face is a skewed pledging pyramid with few top donors and many small donors. To be a financially viable and flexible church we need to address our stewardship issues. Stewardship is also a spiritual practice. By acknowledging the abundance of resources we have, we can practice generosity as a faith community. Giving to the congregation supports others who come here for spiritual nourishment. This is part of our first end.

**Community Outreach:** “Involve everyone in working for a peaceful, just and free world.” This is the third part of our mission. The San Antonio community needs a liberal religious voice, not only as a prophetic call to justice, but as a source of comfort and community. People are hungry for what we have, and it is our responsibility as a faith community to let them know we are here. Being in San Antonio affords us the opportunity to tap into the larger population of Mexican-Americans, military families, and church organizations to spread our word. This is a part of our fourth end.

## **Driving Questions/Cottage Meetings**

Once the SPC settled on our four focus areas we developed driving questions to help us gather ideas and input from the congregation. The driving questions were:

1. How can we welcome people as their full selves into our congregation?
2. What if our radical hospitality turns guests into members?
3. How did you experience radical hospitality when you first came to First UU?
4. How can we encourage more engagement at the leadership level?
5. What is possible when people are able to use their gifts and talents to the maximum?
6. What would our church look like if we surpassed our stewardship goals, staying within the mission and vision of First UU?
7. How could we use the mission/vision of First UU to engage generosity in our church community?
8. What does First UU have to offer to those outside the church community?
9. How can we better reach those we do not yet know here in San Antonio?

We put these driving questions to 15 small groups and 1 large group throughout the congregation and recorded their feedback. We compiled the feedback into lists and organized them by content. From these lists of ideas and our own beliefs, we forged the **GOALS** and **OBJECTIVES** that would address each focus area for the next 3 years.

We submit these **GOALS** and **OBJECTIVES** to be a guiding force to our church leaders to implement action plans of their own. We foresee that the church's Board will then engage a monitoring system to track the progress of these **GOALS** and **OBJECTIVES**.

The SPC is hopeful that working towards these goals and objectives will lead our church to fully welcome seekers and retain more of them to become our future leaders. Our increased financial stability will improve our financial burdens. We can then focus on spreading our mission outward to new people and communities.

## TIMELINE

- **December 2015:** Board President identified potential Strategic Planning Committee members.
- **February 2016:** First SPC meeting on February 23, 2016. Reviewed 2013 Long Range plan and discussed process/timeline for Committee.
- **March-April 2016:** SPC reviewed timeline and conducted SWOT analysis, Appreciative Inquiry to identify 4 main focus areas, which eventually led to developing 9 driving questions.
- **May 2016:** Conducted SWOT Analysis, helping to identify areas of Strength, Weakness, Opportunity, and Threat. Focus areas were identified at this time. Received and reviewed Next Steps Visit Report from Bill Clontz
- **June 2016:** Developed preliminary list of driving questions that SPC will address to First UU Congregation. Used focus areas to guide these questions.
- **September 2016:** Stacy Barnwell replaced Heather on SPC and reviewed what we had done.
- **October & November 2016:** Committee members conducted cottage meetings with 15 small groups to discuss the 9 Driving Questions about what members want/hope for for the future. November 13 after service was an opportunity for all members to provide feedback to Committee using sticky notes on a large poster in Fellowship Hall.
- **December 2016:** Compile feedback from all small groups into patterns and identify patterns and strengths.
- **January 2017:** Discussed responses to Driving Questions. Started to review how we would like to format plan.
- **February 2017:** Further discussed patterns from Driving Questions and narrowed into Goals.
- **March 2017:** Committee presented draft of Strategic Plan to Board
- **April 2017:** Board offered commentary on draft Strategic Plan.
- **May 2017:** SPC met for final time on May 2, 2017 to review and finalize updates to Strategic Plan. Board to receive final plan prior to Board Meeting on May 17, 2017.

# STRATEGIC PLAN 2017

## Radical Hospitality

- **Goal #1: Have a consistent welcoming experience for everyone.** While there are many volunteers who currently welcome visitors, members of the church have reported that the effectiveness of these efforts have been inconsistent over the years. This goal aims to be both comprehensive, in that we are welcoming everyone regardless of their identity or church affiliation, and consistent; we are welcoming every Sunday and/or at every program event. Recommended Initiatives:
  - Create a culture where children and families feel welcomed.
  - Make the campus more accessible for as many people as possible.
  - Develop and implement a follow-up plan for visitors.
  - Develop and implement a plan to stay in touch with at-home members.
  
- **Goal #2: Form deeper spiritual connections with each other.** People come to church looking for community. The reason they need community is because our wider culture is biased toward individualism, and many people are lonely as a result. One of the most common spiritual needs and desires expressed during the small group sessions is to be connected to something greater than oneself and to have deep, meaningful connections to other people. Small groups such as covenant groups are designed to meet these needs. This goal would expand the small group options at the church, and ensure that those options are available to people at all times throughout the church year. Recommended Initiatives:
  - Have a small group experience for everyone from the moment they begin participating in the church

## Leadership Development

- **Goal #3: Develop and implement a means to coordinate volunteer activities and leadership opportunities to the congregation.** One of the challenges of a mid to large size congregation is that there are greater leadership needs than there are leaders volunteering to fill them. This gap in leadership drags down the church's effectiveness. Furthermore, a relatively small number of people rotate through the leadership positions. This goal strives to increase the number of members transitioning into leadership positions by identifying potential leaders and calling them into shared ministry.
- **Goal #4: Support leaders in their work and provide them the skills and help they need to succeed.** Once members become leaders, they need to be supported and recognized for the work that they do. This includes training both in-house and at the regional and national levels. This goal makes the path toward becoming a leader a rich and rewarding one, so that people are happy to serve. Recommended **Initiatives**:
  - Provide member-to-member mentorship opportunities
  - Expand training opportunities for new and veteran leaders
  - Provide childcare for those that need it in order to participate in leadership opportunities
  - Increase access and training to technology on campus, such as internet, social media and cloud services.

## Stewardship

- **Goal #5: Connect the mission of the church to the work of the church.**  
People give to churches not out of a sense of obligation, but because they are inspired by their mission. In the past, the connection between the church's mission and the ask for money have not been clearly communicated. This goal strengthens the ask for financial resources by grounding it in the church's mission and ends. Recommended [Initiatives](#):
  - Fund most church programs in the operating budget
  - Celebrate the work volunteers have done at the church
- **Goal #6: Transform the culture of scarcity to a culture of abundance.**  
Beyond the need for individual pledge drives to succeed, there is a need to shift the wider conversation around money. A culture of abundance sees the possibilities for mission that money can create, rather than dwelling on the problems or deficiencies of what we cannot do as a church because there never seems to be enough money. This shift in the conversation around money toward a culture of abundance will support both short and long term fundraising. Recommended [Initiatives](#):
  - Help members feel excited and passionate about giving to the church
  - Keep stewardship in the conversation throughout the year

## Community Outreach

- **Goal #7: Communicate our programs outward to invite a wider participation.** It is all too common for churches to go about their collective lives and forget that the work they do is of interest to people seeking a spiritual home. Furthermore, the age of electronic and social media has made it very easy and cost efficient to get our voice out into the public square. This goal invites First UU to utilize these media resources to share the good news of Unitarian Universalism. Recommended **Initiatives**:
  - Develop a comprehensive social media strategy
  - Redesign newsletter to reflect and celebrate past events and accomplishments
  
- **Goal #8: Elevate our presence in the San Antonio community.** A church never exists in a vacuum. The ministry the church does always has a context, and for First UU Church that context is the greater San Antonio area. There are numerous partners and constituencies that the church could reach out to in order to do effective ministry. The following have either the greatest amount of potential or access to resources we could utilize in our outreach efforts. Recommended **Initiatives**:
  - Participate with area Interfaith groups
  - Partner with the Military community
  - Establish connections with the Spanish-speaking community

## IMPLEMENTATION AND MONITORING

While the Board is responsible for creating the strategies and goals of the Strategic Plan, it falls to the Minister, in the role of CEO, to implement the strategic plan at the tactical level. We call these “**initiatives**” – concrete projects that support the goals of the strategic plan. Initiatives are specific tasks that are to be achieved in a given church year to advance the goals of the plan.

What follows is a brief summary of some of the processes that will be ongoing throughout the next three years to ensure that the Strategic Plan is progressing, problems can be addressed in a timely manner, initiatives can be created and funded with maximal buy in from the congregation, that the plan is aligned to the goals and the Board’s Ends policies, that the Board is informed of the progress of the Strategic Plan, and that there is a seamless transition to the next strategic plan in three years.

### **Alignment of Goals and Initiatives**

Crucial to the creation, implementation, and evaluation of initiatives is the Coordinating Council. The role of the Council will shift slightly to highlight these three functions as its primary duties. To maintain integrity of the alignment process for all of the goals in the Strategic Plan, representatives from the Stewardship Committee and the Leadership Development Committee will be invited to participate in the Coordinating Council. In the fall the Council will develop a list of initiatives to implement in the coming year. This list may include the recommended initiatives named in the plan itself, or it may expand upon these as time, circumstance, and resources permit. As the church year goes on, the many committees of First UU will be doing the work of implementing the initiatives developed earlier in the year that support each goal. In some cases, this may include staff and minister annual goals as well. Committees would submit budget requests based on the initiatives they anticipate in the following fiscal year. Toward the end of the church year, the Coordinating Council and staff will evaluate how well we have accomplished that year’s initiatives.

### **Board Monitoring**

The Minister will provide the Board with a report on the status of the Strategic Plan three times a year. In the fall the Minister will report on the initiatives that have been developed for the coming year. In the winter the Minister will give a mid-year status update on how well the initiatives are progressing. In the spring, the Minister will share with the Board the evaluation results of that year’s initiatives. These three Strategic Plan monitoring reports will be incorporated into the Board’s annual monitoring schedule.

### **Creating a New Strategic Plan**

Just prior to the end of the current Strategic Plan, the Board will create a new Strategic Planning Committee (SPC). This new SPC will consider which parts of the current Strategic Plan remain unfinished and need to be incorporated into a new strategic plan. The SPC may wish to consider hiring an outside consultant in order to get “fresh eyes” and an outsider’s point of view on the challenges and strengths that lie before the church. A new SWOT analysis will reveal a new set of focus areas, and driving questions can be developed that unpack the will of the congregation in each area. The goal would be to have a new strategic plan before the Board on the eve of the current plan’s end.

## RESOURCES or APPENDIX

First UU of San Antonio 2013-2017 Long Range Plan

Clontz, Bill. *Next Steps Visit Report*. May 2016

Killoran, Rev. Maureen. *Review of First UU 2013 Long Range Plan*. 2015

Rendle, Gil and Mann, Alice. *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations*. Albany Institute, 2003.

Strategic plans from other UU organizations (Wildflower UU 2016-2020, Horizons UU 2005, Thomas Jefferson Memorial Church 2014)