

StratPlan Update for September 2021 Board Meeting

From Marlene Schellenberg, Tanya Brothers, Bonnie Thiessen, Liz Redston, and Peter Miller.

Please see the August board report for more background. This report maps dimensions of planning that have emerged for the StratPlan team and concludes with a planning project list on the last page.

Hopes, strengths and opportunities

- Become engaged with the world. That's who we are! We need to live our mission and values. Not just a few but all of us.
- Be bold! We have demonstrated our problem-solving abilities over and over again. We have the capacity for great change, quickly.
- Plenty of creative examples and ideas from others. E.g., proponents of a Green New Deal. Or Japanese with two groups of planners: (a) for today and near-term, and (b) for 7 generations hence. (The latter are dressed in ceremonial robes.)
- Our UU faith and mission lead us away from being an inward-looking cult or club. As socially engaged learners of what it means to be human, our church can be an incubator and launch pad for just, compassionate, enquiring planetary citizens.
- Covid has blown open a new digital presence and platform to engage our membership and the world.
- Living into a challenging mission is an exciting project to draw in newcomers, retain friends and members, and motivate generous support of time, talent, and treasure.

Weaknesses and threats

- Unsustainable deficit.
- Older contributors are dying. Younger generation and marginalized folks face income uncertainty and can't make up for lost pledges. Traditional stewardship doesn't work.
- Current uncertainty (but opportunity to pivot).
- Starving programming in current budget is harmful and not wise. If people are more engaged through programs and a caring community, they will increase support.
- Internal conflicts can consume energy and attention, sap motivation and support, leave people hurt, and cause folks to leave. But they also provide opportunities to engage differences creatively and learn effective behaviors and systems to implement our Covenant of Right Relations.
- Same old, same old. Unlike others, our church was unresponsive to residential school graves. Although some differences, our worship has a traditional protestant structure. That format eases the transition from other faiths, but is it relevant to the unchurched?
- Irrelevancy. Enjoying one another's company is nice, but insufficient if we are not armed to make a difference in the world.

Our church must plan to build back better now. Why? Because our new mission calls us to do so, and our deficit budget says we cannot delay. The \$55,000 deficit is unrepeatable, thus unsustainable. Together these imperatives provide four intertwined directions for planning.

Four directions planning framework

1. *Make it be that we are a diverse and caring community that is loving, inclusive, responsible, and encouraging.*

- Are members, friends and newcomers welcomed, encouraged, and engaged?
- Are they provided opportunities and guidance to care for and work with others in support of our principles and mission?
- How might our services and programming better celebrate and express our mission?
- Are we well-organized for effective and responsible execution of our mission in accordance with our values (good governance)?

2. *Make it be that we are a learning community open to evidence and varied insights that encourages reflection and exploration. We use what we learn to strengthen our relationships and our capacity.*

- How robust are the opportunities to explore what it means to be a human denizen of the cosmos, of planet earth, of human society, and of close relationships?
- Do we have systems and training in place to support our Covenant of Right Relations?
- What knowledge and skills do we need to support social engagement?
- How can we promote the above forms of learning in the wider community?

3. *Make it be that we are a socially engaged community that works collaboratively, compassionately, and urgently for a just society and for our life-sustaining planet.*

- We have a dedicated Social Justice Team that studies implications of UUism for social action and selects a variety of projects for action. How can we make this work a core commitment and opportunity for the entire congregation?
- With a world of opportunities for “widening the circle” of care and commitment, how might we best prioritize and select where we spend our energy?
- How might we strengthen our eco-social effectiveness and impact?

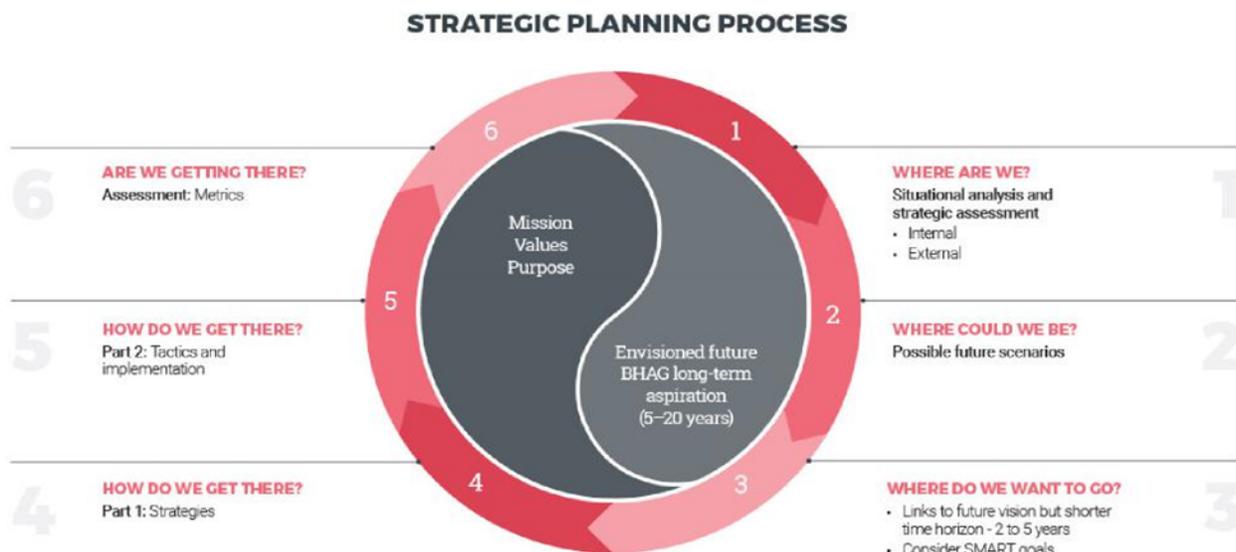
4. *Make it be that we support our community and its mission sustainably.*

- How are we doing in acquiring, retaining, and engaging members? How does this translate into members’ support of the church through time, talent, and treasure? How can we do better?
- The StratPlan team determined that for now our current church property is an important asset to meet congregational needs and support our mission. Selling the church property is less sustainable and more precarious than recovering costs through rental income.
- Liz Redston is leading a strategic review to determine how best to use our building and property to further our mission and increase revenue. A possible stretch financial target might be for net rental proceeds to cover all property costs.

- What is the potential for our church to create one or more social enterprises? A social enterprise (SE) earns revenue by addressing community needs and creating social value. The sale of fair-trade coffee in our shop and yard sales that support the green reuse of goods are social enterprise initiatives we already have.
- Can we design programs and services of benefit to our members and offer them to a wider, paying public and/or find support from donors and foundations who value our contributions to society? (E.g., programs on death and dying, love and commitment, conflict resolution, social-emotional skills.)
- SEs are funded by (a) consumers who directly benefit from the service offered (e.g., learning to resolve conflicts) or (b) who want to “buy” social value with goods purchased (e.g., Steve’s fair-trade coffee) or (c) social procurement by businesses or governments who want to increase the social benefits of their expenditures (e.g. purchasing building insulation services from an organization that provides training and employment to ex-cons, thereby avoiding social costs of recidivism and improving lives) or (d) donors or foundations who value the social goods produced.

Key questions and segments of a strategic planning process

The planning wheel below helps remind us of typical planning questions and segments.



Four types of planning

The StratPlan team recognizes that different types of planning are required. 1. is business-as-usual, but 2., 3., and 4. are part of planning our future.

1. **Current and continuing activities and projects.** Goals are already set, and we look for ways to achieve them. Who will speak and coordinate for November Sunday services? The roof is leaking. How do we fix it? This planning corresponds to segment 5 of the planning wheel above and occupies much of the time of the Board and committees.

2. **Assessment and improvement.** Taking a step back from usual planning, we ask how well are we achieving our goals and mission? Are there adjustments that might improve performance and living into our mission? Segment 6 assessments provide feedback to improve planning and execution in segments 4 and 5 of the planning circle.
3. **Short term transitional planning for the easing of Covid restrictions.**
We had days to plan for the sudden Covid lockdown, but more time for the easing. We are committed to hybrid service delivery and a precautionary interpretation of public health guidance. What more do we need?
4. **Visionary planning and direction-setting.** Unlike business-as-usual planning, transformational planning “engages our imaginations to craft new ways of being and doing.” It is a deliberate pursuit of new possibilities to fulfill our mission and then selecting and shaping some of these into new goals or directions for change. This may include a BHAG. “A big hairy audacious goal, or BHAG, is a clear and compelling target for an organization to strive for.” Segments 1-3 of the planning wheel reset goals.

Research and consultation

Planning requires knowledge, engagement, and commitment. Church plans should be built on shared information and owned collectively.

1. **Researching our situation.** Segment 1 of the planning wheel asks, where are we now? What are our current circumstances and assets? What are relevant social trends that we need to accommodate? What is going on in the lives of our friends and members?
2. **Empathy mapping.** Six years ago, Wadood Ibrahim engaged the congregation in empathy mapping to understand the motivations and outcomes congregants sought and the obstacles and encouragement they encountered. This approach provides information on how individuals experience the church in their quest.
3. **Surveys, interviews, and records** are means of gathering and recording knowledge of friends and members at an individual level. Our membership database contains information on membership status, pledging, donations, and contact information. Pastoral Care has further information on significant life events that has been voluntarily shared. What about information on skills and interests for volunteer opportunities?
4. **Strengths, Weaknesses, Opportunities, Threats (SWOT).** This approach provides a strategic evaluation of the internal and external knowledge gathered above as a foundation for new possibilities. (See the opening sections of this report for a condensed SWOT analysis by the StratPlan team.)
5. **Contributions to shared documents**, e.g. Liz’s brainstorm on rental opportunities at <https://docs.google.com/document/d/1W3R0AZBjqWhrqA5s-YIsLAGF8wDW2hYMIAvvEBSrf1k/edit?usp=sharing>
6. **Workshops and focus groups** enable sharing information and exploring possibilities. They are also beneficial purposeful social interactions that contribute to church life.
7. **Committees and working groups** are ready-formed focus groups, which can engage in the assessment and improvement activities mentioned earlier.

Planning projects

We identified a series of planning projects. Each requires a champion to happen.

1. **Transition to hybrid services.** Odell chairs a transition team to make recommendations on logistic and equipment needs for hybrid services.
2. **Reconnection.** Liz has developed ConnectNow proposals (a) to gain knowledge of congregants' vaccination status and attitudes towards in-person gatherings and (b) to reconnect and welcome personally. Recognizing that it would be time-intensive for church leadership to contact every friend and member for an extended personal conversation, other avenues like after-church chats, group participation, and surveys are being considered to reach the goal of reconnecting with every member and friend. (c) Other planning initiatives can piggy-back on this one by expanding questions discussed and information sought.
3. **Connect and engage.** Rev. Meghann and Andrea are updating the "path to membership" initiative, whereby every newcomer is welcomed, socially connected, and engaged to explore possibilities for deeper participation. Synergies or overlap with ConnectNow.
4. **Stewardship and membership review.** How are we doing in retaining, and engaging members? How does this translate into members' support of the church through time, talent, and treasure? What more do we need to know about members? (Complements 3.)
5. **Rentals and building review.** Liz Redston leads a strategic review to determine how best to use our building and property to further our mission and increase revenue. A possible stretch financial target might be for net rental proceeds to cover all property costs.
6. **Virtual presence and digital strategies.** How can we be most effective online in pursuit of our mission for our members and the public? Need tech consultant. Lessons from Calgary.
7. **Governance review.** How can we be better organized for effective and responsible execution of our mission in accordance with our values? Board needs to establish a governance review working group that takes account of SMT and other recommendations.
8. **Healing process and reform.** Harms have occurred. How do we heal and ensure better response to conflict and harm in the future? Board needs to establish healing review WG.
9. **Mission tune-up.** Committees, working groups, and/or clusters need to review their mandates and operations in light of our new mission. (Assessment and improvement.)
10. **Visionary outreach.** How can our church be a beacon and force for good in our community? Can we find community support for our mission? The StratPlan team might shepherd this project. Shaun Loney has volunteered to conduct a couple of social enterprise workshops with our church, as he has with 11 other churches.