

FIRST UNITARIAN CONGREGATION OF OTTAWA

THREE-YEAR STRATEGIC PLAN

October 2014-October 2017

FOR CONGREGATIONAL APPROVAL

Developed by the Board in collaboration with congregants and staff, this strategic plan sets out our common vision for the First Unitarian Congregation of Ottawa for the next several years. It identifies key actions to help us achieve desired outcomes around six broad objectives (ends):

1. [AN ENERGIZED SPIRITUALITY](#) – To develop worship services, and other spiritual experiences, to engage congregants in spiritual and personal growth, based on the 7 Principles
2. [A UNIFYING AWARENESS OF A COMMON VISION](#) – To strengthen connections with each other and the wider UU community through a shared sense of purpose and meaningful engagement
3. [A RENEWED, GROWING CONGREGATION](#) – To raise our profile and attract visitors, welcome and integrate newcomers and encourage long-term retention of members
4. [STRONG SOCIAL JUSTICE AND ENVIRONMENTAL PROGRAMS](#) – To encourage congregational action in support of our UU social justice and environmental principles
5. [APPROPRIATE, RELIABLE STRUCTURES AND RESOURCES TO SUPPORT CONGREGATIONAL PRIORITIES & GROWTH](#) – To ensure long-term sustainability of the congregation through sound financial management and governance practices
6. [ENHANCED RELATIONSHIPS WITHIN THE CONGREGATION](#) – To improve quality and timeliness of consulting with and communicating to the congregation; to foster a culture of right relations

Leads have been identified, indicating which individuals, committees or teams have accountability under the Congregation's governance model for implementation of each Key Action. The **involvement of other members of the congregation will be critical** to the successful implementation of Key Actions and achievement of outcomes. If you are interested in helping to make any aspects of this plan a reality, please contact the Lead or any member of the Board.

Priorities have been identified (in bold) to help focus our efforts between now and Fall 2015. The Board will pay particular attention to progress made in these areas, and provide regular updates to the congregation through Board announcements, the President's column in the Spire newsletter, and other means, as appropriate.

Next fall, we'll revisit the plan and decide where our focus should be in the second year of the plan's implementation. For now, please join with us in working on [theme-based ministry](#), [strong choir presence](#), [integrating newcomers](#), [raising our profile](#), [expanding connections with the broader community](#), [social responsibility activities](#), [matching goals and financial resources](#), and [establishing a communications officer position](#).

1. Spirituality

<u>The End:</u>	<u>Outcomes:</u>	<u>Key Actions</u>	<u>Lead</u>
<p>AN ENERGIZED, SPIRITUALITY</p> <p><u>Strategic Intent :</u> To develop worship services, and other spiritual experiences, to engage congregants in spiritual and personal growth, based on the 7 Principles.</p>	<p>Theme-based ministry with opportunities for reflection and discussion</p> <p>Spiritual experience accessible to all through lifespan learning programs, including RE</p> <p>All ages and lay people involved in worship services</p> <p>Rich and vibrant music program</p> <p>Pastoral and spiritual care integrated into the life of the congregation</p>	<p>Implement theme-based ministry beginning fall 2015, including small group ministries (SGM)</p> <p>Integrate lifespan learning, including RE, with congregational theme-based ministry</p> <p>Experiment with alternate worship services to involve all age groups (e.g. services at Unitarian House beginning fall 2014)</p> <p>Rebuild and strengthen worship associate program</p> <p>Maintain strong choir presence during services and within the broader community</p> <p>Increase awareness of availability of spiritual care services and as resources are available, explore the possibility of expanded services (e.g. pre-marriage counselling)</p>	<p>Minister and team</p> <p>Director Lifespan Learning</p> <p>Minister and team</p> <p>Minister and team</p> <p>Music Director</p> <p>Minister and team</p>

2. Community & Cohesion

<u>The End:</u>	<u>Outcomes:</u>	<u>Key Actions</u>	<u>Lead</u>
<p>A UNIFYING AWARENESS OF A COMMON VISION</p> <p><u>Strategic Intent:</u> To strengthen connections with each other and the wider UU community through a shared sense of purpose and meaningful engagement</p>	<p>Members have a shared understanding of the congregation's priorities and aspirations</p> <p>Congregation is well connected and aligned with the wider UU movement</p> <p>Increased sense of cohesion by focusing on activities in line with congregational priorities</p> <p>Enhanced coordination of activities through appropriate organizing structures and inclusive communication</p> <p>Strong community with common values on the campus and mutually beneficial connections to the broader community</p>	<p>Renew the congregational strategic plan every three years and annually, in consultation with members, set priorities for the coming year; provide regular reports to the congregation on progress</p> <p>Every two years, choose a congregational focus for collective action that connects us to others locally and/or internationally¹</p> <p>Keep abreast of and support CUC activities, including participating in the vision and mission exercise in 2015.</p> <p>Building on previous community planning exercise, broaden campus planning to community visioning with River Parkway Childcare Centre and Unitarian House, with particular focus on the Light Rail Train planning process</p> <p>Continue to clarify/communicate organizational structures and policies under the policy governance model</p> <p>Promote and support neighbourhood groups and arts and social groups as a means of strengthening community cohesion</p>	<p>Board and congregation</p> <p>Minister and Social Responsibility Council</p> <p>Minister and Denominational Affairs Committee</p> <p>Board and Campus Planning Committee</p> <p>Board</p> <p>Director Lifespan Learning</p>

¹ i.e. Pathways to Education (2011-13), Multifaith Housing Initiative (2013-2015)

3. Renewal/Attracting and Retaining Members

<u>The End:</u>	<u>Outcomes:</u>	<u>Key Actions</u>	<u>Lead</u>
<p>A RENEWED, GROWING CONGREGATION</p> <p><u>Strategic intent:</u> To raise our profile and attract visitors, welcome and integrate newcomers and encourage long-term retention of members</p>	<p>Newcomers of all ages, sexual orientation, ethnic, economic and religious backgrounds are welcomed and made to feel at home in the congregation</p> <p>People of all ages are attracted through services and outreach</p> <p>Profile of First Unitarian is raised in Ottawa and area, including through social and environmental justice, interfaith and other activities</p> <p>Membership is increased through new memberships and retention of existing members</p> <p>New members integrated into congregational activities</p>	<p>Explore new ways of nurturing and integrating newcomers and new members, including encouraging participation in small-group ministry.</p> <p>Develop communication strategy, including potential training needs, to ensure effective use of traditional and new media to raise First UU's profile and attract new members</p> <p>Expand connections with broader community (e.g. university and college campuses, like-minded organizations) and use rites of passage, rentals and major events (e.g. concerts, Fall Fair) as outreach vehicles</p> <p>Develop member retention strategies, including possible follow-up with lapsed/departing members.</p>	<p>Minister and Membership Team</p> <p>Board, Minister and Team</p> <p>Minister and Team</p> <p>Minister and Team</p>

4. Social Justice and Environment

<u>The End:</u>	<u>Outcomes:</u>	<u>Key Actions</u>	<u>Lead</u>
<p>STRONG SOCIAL JUSTICE AND ENVIRONMENTAL PROGRAMS</p> <p><u>Strategic Intent:</u> To encourage congregational action in support of our UU social justice and environmental principles</p>	<p>Strong Social Responsibility Council (SRC) and working groups develop congregation-wide projects in line with congregational priorities</p> <p>All committees (congregational groups and teams) take justice and environmental issues into consideration when setting objectives and carrying out activities, e.g. carbon-neutral conferences, inclusive and accessible meetings</p>	<p>Increase the profile of and congregation participation in Social Responsibility activities, with special focus on involving youth and on strengthening links to community partners</p> <p>Choose new social/environmental justice congregational focus at spring 2015 AGM</p> <p>Follow up on fossil fuel (FF) divestment motion passed April 2014</p> <p>Take action further to the CUC pervasive surveillance resolution passed in May 2014.</p>	<p>Social Responsibility Council (SRC)</p> <p>SRC and Minister</p> <p>SRC</p> <p>SRC</p>

5. Financial Stewardship and Governance

<u>The End:</u>	<u>Outcomes:</u>	<u>Key Actions</u>	<u>Lead</u>
<p>APPROPRIATE, RELIABLE STRUCTURES AND RESOURCES TO SUPPORT CONGREGATIONAL PRIORITIES & GROWTH</p> <p><u>Strategic intent:</u></p> <p>To ensure long-term sustainability of the congregation through sound financial management and governance practices</p>	<p>Balanced operating budget</p> <p>Activities aligned with financial envelope</p> <p>Increased annual revenues through effective pledge campaign and fundraising activities</p> <p>Clear policies, responsibilities and accountabilities (reporting relationships) in bylaws and policy manuals</p> <p>Sound and actionable advice from Board committees</p>	<p>Match goals and financial resources</p> <p>Separate capital and operating budgets</p> <p>Identify appropriate amount to put into capital reserve fund annually</p> <p>Organize and implement capital campaign 2016-2018, including identifying key funding priority(ies)</p> <p>Finalize Board Policy Manual</p> <p>Strengthen and renew Board committees</p> <p>Strengthen communication between Board and committees/groups such as SRC</p>	<p>Board and staff</p> <p>Director Operations and Treasurer</p> <p>Director Operations and Treasurer</p> <p>Minister, Board</p> <p>Board, Governance Committee</p> <p>Board</p> <p>Board</p>

6. Internal/Interpersonal Communications

<u>The End:</u>	<u>Outcomes:</u>	<u>Key Actions</u>	<u>Lead</u>
<p>ENHANCED RELATIONSHIPS WITHIN THE CONGREGATION</p> <p><u>Strategic intent:</u></p> <p>To improve quality and timeliness of consulting with and communicating to the congregation;</p> <p>To foster a culture of right relations</p>	<p>Open, timely communications and consultations</p> <p>Right relations culture in the church community that includes the staff</p> <p>Staff and volunteers supported with clear work descriptions & reporting relationships and appropriate recognition of their contributions</p>	<p>Use weekly announcements and regular Town Halls to inform and engage congregants in the work of the congregation</p> <p>Review and update the congregational covenant (5-year review)</p> <p>Develop and communicate clear right relations policies and procedures, including access to right relations facilitators</p> <p>Continue regular communications surveys and ensure appropriate follow-up on identified concerns</p> <p>As funds become available, establish and fill a communications officer position</p> <p>Support staff and volunteers with clear job descriptions and reporting relationships, and appropriate recognition and training.</p> <p>Develop and maintain a congregational directory, including key contacts for committees and groups</p>	<p>Board</p> <p>Board and Minister</p> <p>Board and Minister</p> <p>Board</p> <p>Director of Operations</p> <p>Minister, Director of Operations</p> <p>Minister, Director of Operations</p>