

Moving Forward Together

**The Unitarian Church of Edmonton's
Strategic Plan for 2016-2020
Part 1**

April 3, 2016

What is strategic planning and why does UCE need to do it?

“If you don’t know where you’re going, you won’t know when you get there” - Yogi Berra

Strategic Planning is a process of organization renewal, in which an organization reviews its mission and values, scans the environment, assesses its needs, plans and executes necessary actions and measures the results of these on an ongoing cyclical basis.



UCE has not had a strategic plan in place for over a decade. It was time for our congregation to re-engage in such an ongoing process and with this in mind, the UCE Board appointed in 2015 a Strategic Planning Team consisting of Karen Mills (chair), Louise Charach and Julius Buski. Dozens of church members were engaged in the process, resulting in this report, which is Part 1 of the plan.

Part 1 of a Two-Part Plan

This report is Part 1 of the plan. It proposes the vision and the broader goals to help us work toward realizing our vision. Following approval, the Strategic Planning team will work with the congregation to develop 1, 2 and 3-year action plans. These will enable the Unitarian Church of Edmonton to continue fulfilling the hopes and dreams expressed by congregation through this planning process.

Congregation Snapshot

As of March 28, 2016

Membership – 182 members, 69 friends

Average Sunday service attendance (September 6, 2015 to March 27, 2016) - 77

Staff –

Minister, full-time

Office administrator, half-time

Director of Religious Exploration, contract, 20 hours per week

Bookkeeper, contract

Cleaners, contract, 3 times per week

Total 2015-16 budget – \$300,527 (\$89,400 from full-time renters)

Total 2014-15 budget – \$300,074 (\$90,024 from full-time renters)

Strategic Planning Process Timeline

March 2015	Formation of Strategic Planning Team (Julius Buski, Louise Charach, Karen Mills) and creation of process plan
April 5 – May 24, 2015	Weekly questions to congregation
May 31, 2015 and identify themes	Congregational meeting to review question input
June – September, 2015	Action group work
August 2015	Congregational RE/Adult Programs survey
October 18, 2015	Congregational meeting – Action Group presentations
November/December 2015	General congregational survey
January/February 2016	Vision statement review
February 27, 2016	Board retreat to consider recommended vision statement, select and prioritize actions and set proposed implementation timelines

April 3, 2016

Presentation of vision and Part 1 of strategic plan to the congregation

Key Findings

During the data-gathering phase of our process, four threads repeatedly wove their way through conversations:

1. Community is key.

Members and friends of UCE highly value the relationships they have formed, and the resulting sense of community and belonging. They are looking for more opportunities to grow and strengthen relationships and want to:

- Make it easier for people to find the congregation and their connection within it,
- Enrich their own lives and the lives of others,
- Ensure that we have robust pastoral care, and
- Strengthen relationships between generations.

2. We crave connection.

Not only do UCE folks want to connect with each other, they want to see connections between programs and Sunday services, between the initiatives within our walls and those outside. We want to feel that we're moving forward as a community, with common purpose.

3. Many things are already working well at UCE.

Successful and sustainable strategic planning builds on existing strengths. As Rev. Joan Van Becelaere, a UU strategic planning specialist observes, "A group that looks to its strengths will build on them and move forward through change with grace. A group that looks to its weaknesses and what is wrong will fall into hopelessness, pathology, blame and deficits."

Luckily, there are lots of strengths at UCE to build on. Members and friends highlighted:

- A compassionate, accepting and respectful community, bonded by strong values, a curiosity about the world around them, and high expectations of themselves
- Great music, engaging service topics, meaningful social justice activities and a building with flexible space to host a variety of events and activities
- A willingness to reinvent ourselves and try new things

4. We've had a rest; now we're ready for action!

Just like nature, there are seasons and cycles to any group. Our congregation has just gone through a long winter. Many things moved us into a winter mode – the aging or death of some key leaders, burnout after all the energy that was needed to purchase and renovate our beautiful space, job and life changes that made volunteer time scarce. All of this is natural. There are times when we must be dormant and lie fallow. We must rest ourselves so

that we have the energy to nurture others. Now, however, we are collectively sensing a move into spring. A new energy and the tingle of revitalization is buzzing in the congregation. We're ready to get moving!

The Process

1. Action Groups

A large amount of input was received early in the planning through the congregation's answers to a series of weekly questions and a congregational meeting in May 2015. Eight key themes appeared:

- Stewardship, Finance and Canvass
- Publicity and Communications
- Governance and Administration
- Church Services
- Pastoral Care
- Programs and Religious Education
- Building Community
- New Generations

Volunteers signed up to participate in eight action groups to take a deeper look at each topic and identify short- and long-term actions to move us forward in each. Pastoral Care and Building Community were combined into one group when participants saw a close connection between the two. The New Generations group did not complete a report.

The specific questions the action groups were requested to consider were:

Stewardship/Finance/Canvass Action Group

Where does our money come from? How should we earn, ask for and manage money? How should we make financial decisions? How should we share financial information within the congregation?

Publicity and Communications Action Group

How do we let the world know about UCE? How do we help our actions have reach more broadly into the world? How do we invite new people to check us out? How do we let members and friends know what's going on in the church?

Governance/Administration Action Group

Who sets policies and procedures? What rules and organizational structures do we need to function? Who decides what staff and volunteers we need? Who hires, trains, evaluates, and manages staff and volunteers? Who should be responsible for record-keeping and long-term planning?

Church Services Action Group

How can we consistently make church services meaningful? Who should participate in the planning and offering of services? Are there elements that must be included every week – and who decides this? When should services be held?

Programs/Religious Education Action Group

How do we meet the religious education needs of all generations? How are programs structured? Who is responsible for organizing and delivering them? How do we appeal to and satisfy the broad range of interest and experience in our community?

Building Community Action Group

How do we create meaningful relationships at UCE? How do we welcome newcomers and honour elders? How do we foster opportunities to connect? How do we deepen our connections? How do we build bridges between UCE and the wider community?

New Generations Action Group

How do we serve the needs and spark the interest of people under 30? How do we make UCE a comfortable place for youth and young adults? How do we create relationships between different age groups? How do we make UCE's demographics more reflective of Edmonton's population? How do we welcome new skills and ideas?

The full reports of the action groups as well as other specific details of the strategic plan components are available for perusal in the 100-page plus document in the UCE Church Office.

On October 18, we held a congregational meeting after the service at which we presented the short- and long-term actions recommended by the Action Groups. Two overall themes emerged: we desire better connections both within UCE and without, and we need a clearer view of roles and responsibilities and an understanding of how work gets done at UCE.

2. Congregational Survey

A congregational survey was conducted from November 23 to December 14, 2015 to gauge opinion on various aspects of church life and issues identified by the action groups. A summary is attached to this report as an appendix.

The work from the action groups, combined with the earlier feedback and results of the congregational survey, informed the next phase of the planning: reviewing the vision statement.

3. Development of a revised Vision Statement

In October 2015, the Strategic Planning Team asked Susan Lynch to chair a small group to revisit the UCE vision/mission statement in light of ideas generated during the strategic planning processes. The group was invited to determine whether any changes to the vision/mission were necessary and, if so, what they should be.

Several church members agreed to participate in the small vision study group:

John Turvey	Audrey Brooks
Stella Clarke	Beth Jenkins
Maurice Bourgoïn	Ruth Patrick
Shiraz and Lauren Kay	

The group examined the current vision and concluded that it needed to be updated to reflect contemporary congregational ideas. Drawing on the documents created by the seven UCE action groups, information from the congregational survey, and information from the UCE website and the websites of other Unitarian congregations, the group identified the ideas they thought should be reflected in a revised vision statement.

Current Vision Statement

The Unitarian Church of Edmonton

A liberal religious, multi-generational congregation: We celebrate a rich mosaic of free-thinking, spiritually-questioning individuals joined in common support and action. We welcome diversity, pursue the common good, and work for justice. We believe in the compassion of the individual heart, the warmth of community, and the search for meaning in our lives

Proposed Vision Statement

Unitarian Church of Edmonton
Searching Learning Connecting Serving

The Unitarian Church of Edmonton is a congregation openly and honestly searching, learning, connecting, and serving.

Searching
for spiritual
meaning in
our lives

Learning
to
understand
ourselves
and others

Connectin
g to build
fair, just,
caring
communities

Serving
each other
and our
communities
near and far

- The blue¹ box of key words could be used as a header on UCE documents, perhaps letterhead, posters, signs etc.
- The red box would be used to expand on the blue box where appropriate
- The green boxes are a fuller expansion on the meaning of the key words in the context of UCE

¹ The colours are not meant to be significant. They were only used here to indicate three different levels of detail.

4. Aligning Our Vision and Our Actions

The next step in our process was a day-long UCE board retreat facilitated by the Strategic Planning Team on February 27, 2016. At this retreat, board members reviewed suggested actions, combined those with like intent and eliminated those that were already being resolved through other processes. They then aligned the remaining actions by common theme and assigned estimated times to complete each action. A board member or the minister was assigned to be the point person (i.e., the one who encourages action, answers or directs questions and acts as the communication conduit and board liaison) on each proposed action.

The board also reviewed a number of actions already taken or in process as a result of earlier feedback, either from congregational meetings, reports of the action groups, or the congregational survey.

5. Actions taken to date

People were so enthused with the ideas suggested by the Action Groups that they couldn't wait until the strategic plan was formally presented to begin diving in. Here are the suggestions that have already been put into action since the fall:

- Finance and Building and Grounds committees have been appointed
- The church administrator is sorting through and organizing all administrative and policy files and documents
- The board has approved a conflict of interest policy and a volunteer confidentiality agreement.
- Church Services have tried different ways of letting people know services are beginning.
- Brian is recruiting people to choose music for services.
- A new church database (PowerChurch) has been installed and is being populated.
- Music information (title, artist, arranger, etc.) is being included in orders of service.
- Announcements have been moved to the end of services.
- A display with information about the charity of the month is being maintained.
- The Social Justice group has hosted visits to the Food Bank and iHuman.
- News about UCE members and friends is being compiled by Audrey Brooks and included in the newsletter.

6. Proposed Actions

Following the retreat, the Strategic Planning team aligned the actions by the four vision elements: searching, learning, connecting, serving.

Searching
for spiritual
meaning in
our lives

Activity	Timeframe	Lead
Review all elements and rituals of Sunday Services	< 6 months	Church Services Committee
Review special services (e.g., Blue Christmas, Flower Communion)	< 6 months	Church Services Committee
Sing a familiar hymn early in each service that is meaningful for all ages	< 6 months	Church Services Committee
Use "Story for All Ages" in the orders of service	< 6 months	Church Services Committee
Integrate children more fully into services	Within 1 year	Church Services Committee
Revitalize groups such as Chalice Circles	1 - 2 years	Membership Committee

Learning
to
understand
ourselves
and others

Activity	Timeframe	Lead
Research new adult RE curricula	< 6 months	Brian Kiely
Revitalize Adult RE Committee	Within 1 year	Board
Offer seminars on different world religions	Within 1 year	Adult RE Committee
Review and possibly revise Religious Exploration funding model	Within 1 year	Board
Review Director of Religious Exploration job description and funding	1 - 2 years	Board

Offer Our Whole Lives for adults regularly	1 - 2 years	Adult RE Committee
Offer more adult courses for our own community and as outreach	Up to 3 years	Adult RE Committee
Host special programs for youth	Up to 3 years	RE Committee
Host needs/interest based seniors programs	Up to 3 years	Adult RE Committee/Board

Connecting to build fair, just, caring communities

Activity	Timeframe	Lead
Welcome new faces	< 6 months	Membership Committee
Welcome new members (i.e., those who have signed membership forms) and integrate their skills	< 6 months	Membership Committee
Mention highlights from Care and Connections book during services	< 6 months	Church Services Committee
Form a standing committee for communication and promotion	< 6 months	Mike Keast
Develop communications goals and plan(s) to help UCE achieve these goals	Within 1 year	Communication Committee
Host monthly intergenerational programs - movie nights, game nights, etc.	Within 1 year	Youth Group
Host interest- and activity-based small group social/community gatherings to increase fellowship	1 - 2 years	Membership Committee

Serving
each other
and our
communities
near and far

Activity	Timeframe	Lead
Develop strong financial commitment to church programs	< 6 months	Board
Review UCE pet policy	< 6 months	Board
Clarify procedure for reporting maintenance or operation needs*	< 6 months	Brian Kiely
Usher training	< 6 months	Membership Committee
Greeter training	< 6 months	Membership Committee
Recruit and train service leaders.	Within 1 year	Church Services Committee
Schedule annual board retreat/training session	< 6 months	Board
Explore establishing a Care and Connection Coordinator to coordinate pastoral care (based on Westwood model)	< 6 months	Lillias Cowper
Clarify policy regarding non-UCE UU work by the minister	< 6 months	HR Committee
Clarify minister's role relating to church programs (e.g., Adult RE programming)	< 6 months	HR Committee
Revitalize Ways and Mean Committee	Within 1 year	Board
Review and clarify roles of all staff	Within 1 year	HR Committee
Acknowledge volunteers and share the load	Within 1 year	Board
Invite newcomers into easy to do starter working roles	Within 1 year	Membership Committee
Implement longer-term financial plan for UCE	1 - 2 years	Finance Committee
Review and clarify roles of board members, committee chairs	1 - 2 years	Karen Mills and Yvonne Mireau
Establish measurement tools for board and committee work	1 - 2 years	Board
Improve orientation and training of board members and volunteers	Up to 3 years	Karen Mills
Put in place recruitment, training and	Up to 3	Nominating

succession planning for volunteer leaders	years	Committee
Increase building and grounds reserve	Up to 3 years	Finance Committee

*Procedure already in place - write it in book outside church administrator's office or contact church administrator directly. Brian will ensure this instruction is included in future newsletters and orders of service

7. Next Steps

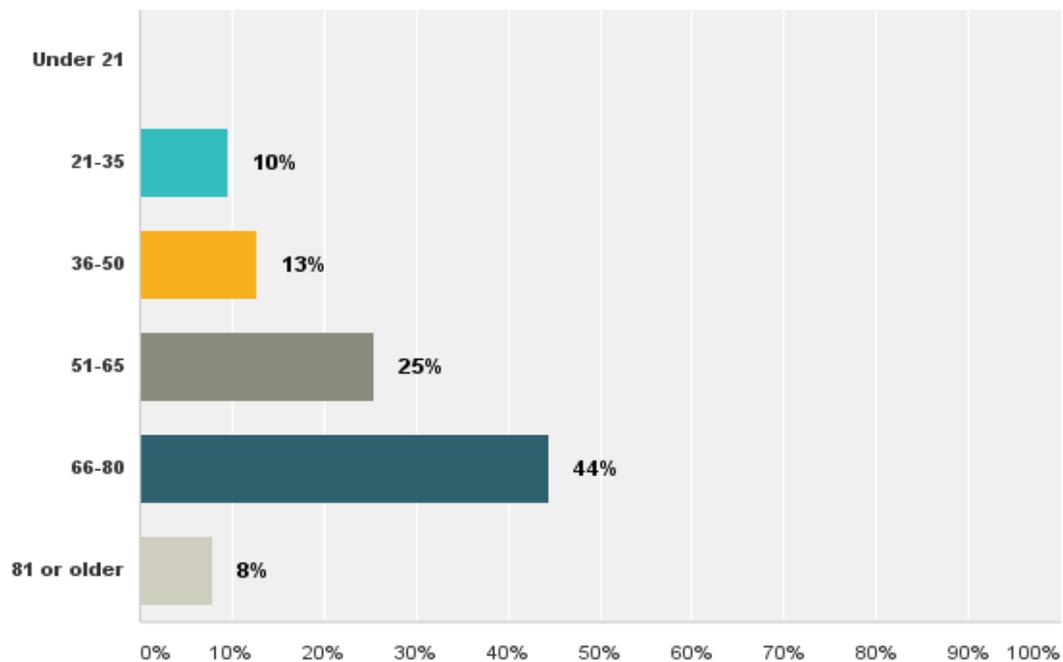
As stated earlier, strategic planning is a cyclical process. This report provides information on work undertaken to date and projected shorter term (1 year or less) actions. Approval of this plan, will enable the Strategic Planning Group, with the assistance of the congregation, to continue work on the next, longer term phases.

UCE Congregational Survey Results Highlights

Who did we hear from?

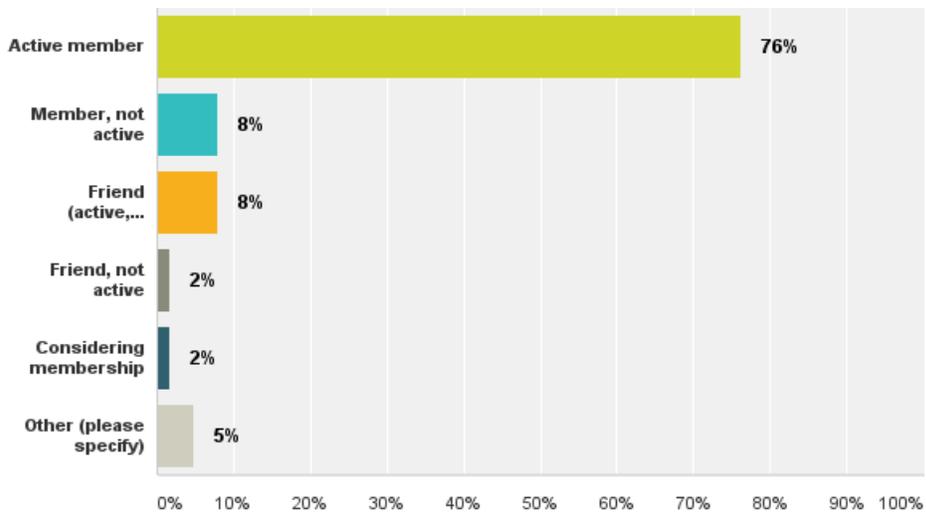
The survey was open from November 23 to December 14, 2015. We received 65 completed surveys. This was an excellent response, representing over one-third of our members (36%). The majority of respondents (44%) were in the 66-80 years of age category.

Age



Membership

In terms of "relationship to congregation", 76% were active members; 8% were members, not active and 8% were friends.

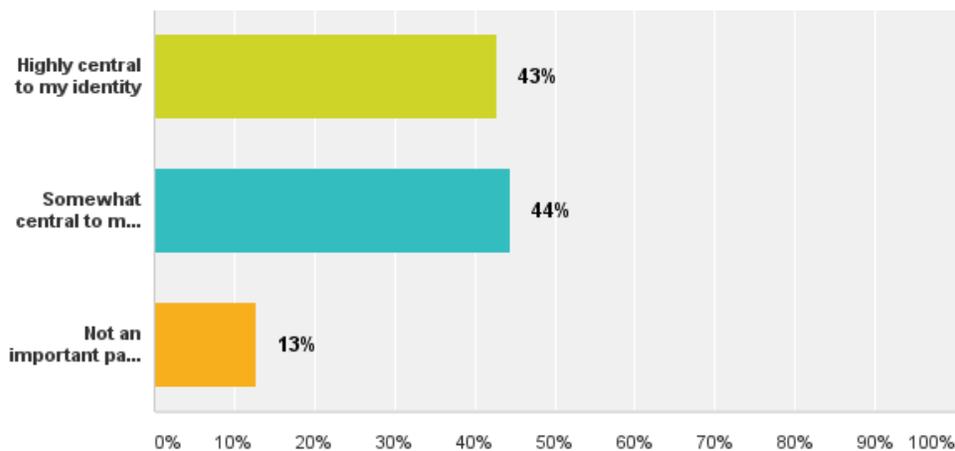


A total of 67% of respondents were active on a committee or project over the past year.

Your relationship to Unitarian Universalism and UCE

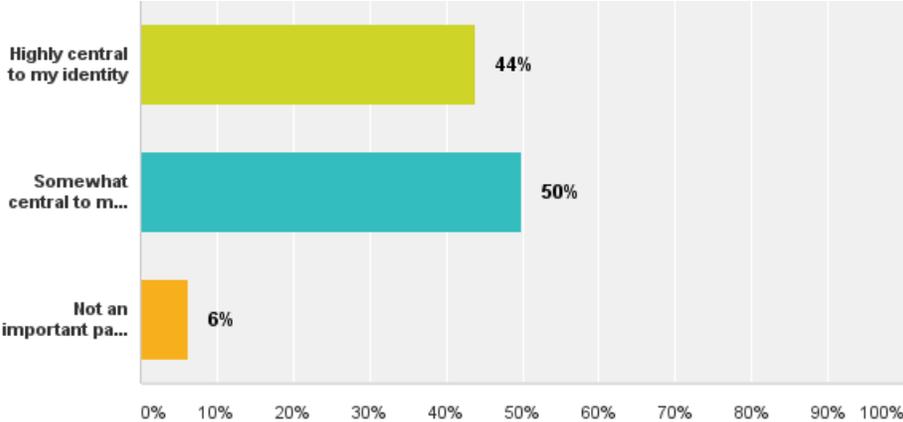
Respondents reported that their affiliation to Unitarian Universalism was highly central or somewhat central to their identity as an individual (43% and 44%). Only 13% reported it was not an important part.

Importance of affiliation to Unitarian Universalism



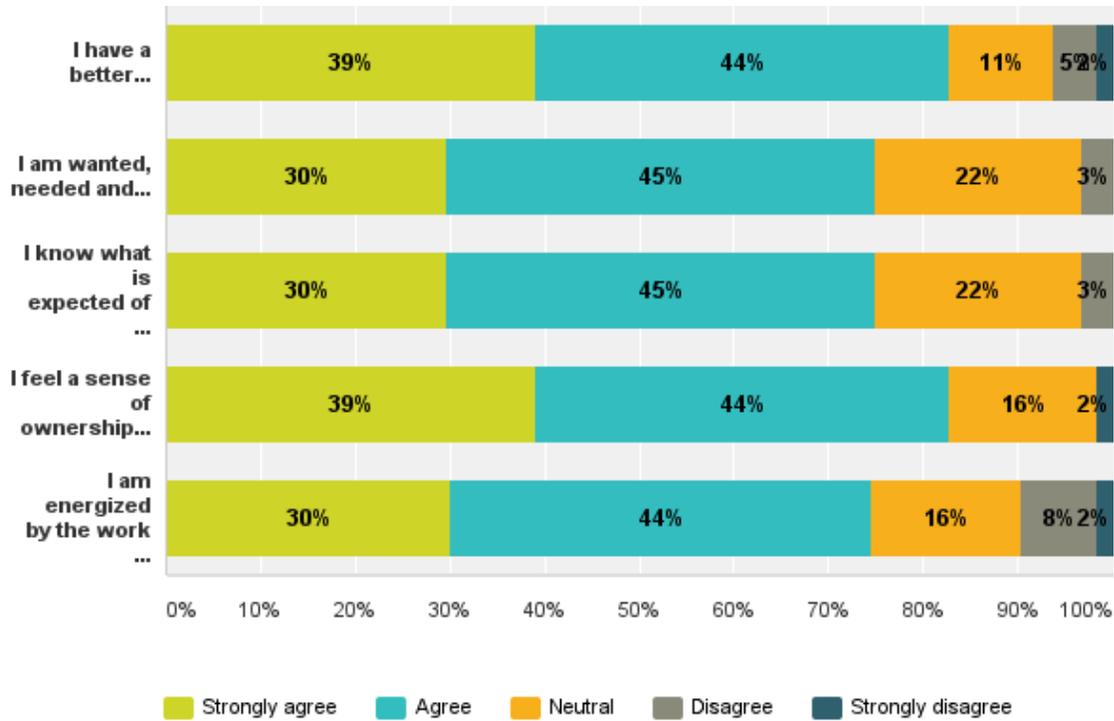
Importance of affiliation to the Unitarian Church of Edmonton

Respondents' affiliation to UCE was very similar to their affiliation with Unitarian Universalism (44% highly central and 50% somewhat central).



Over 75% strongly agreed or agreed with statements describing solidarity and kinship to the church and services and each other.

Sense of solidarity and kinship with UCE

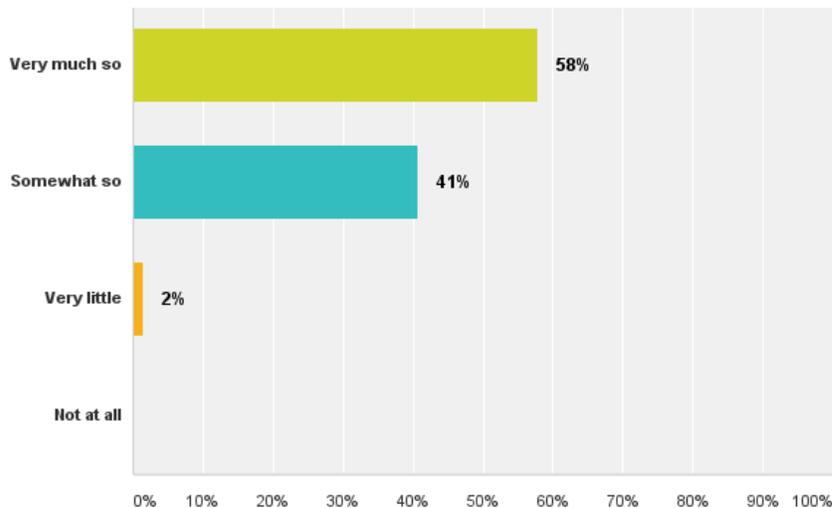


Full labels from top to bottom are:

- I have a better understanding of UU faith today because of the services and classes offered by this congregation.
- I am wanted, needed and valued in this congregation.
- I know what is expected of me as a member of this congregation.
- I feel a sense of ownership and responsibility for what the congregation is doing.
- I am energized by the work I do in and on behalf of this congregation.

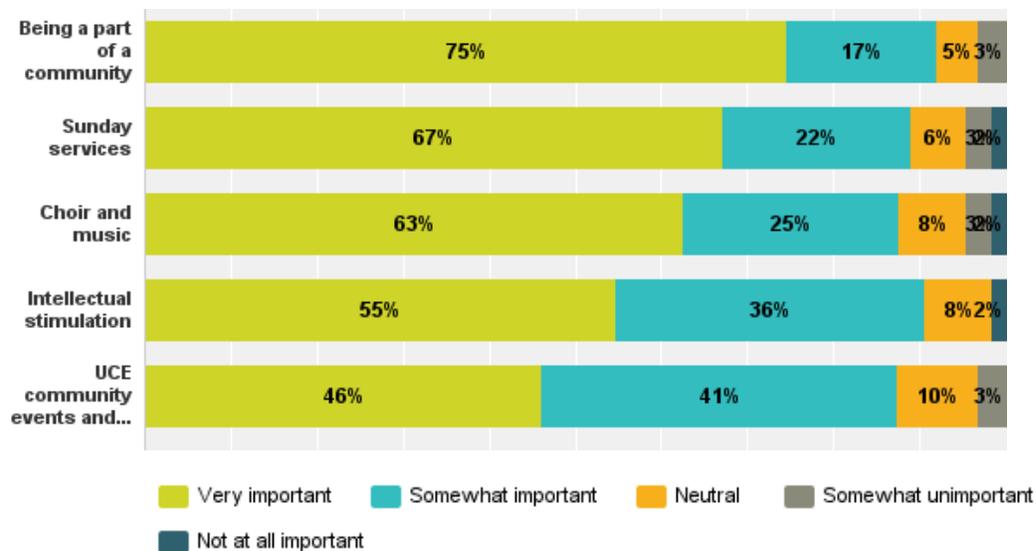
In response to the question "To what degree does UCE impact your life in positive ways", 99% reported "very much or somewhat," and described such factors as sharing of ideas, meditation, friendships, acceptance, social action, sermons.

Feel UCE has a positive personal impact



The aspects of UCE most important to you were: being part of a community; Sunday services; choir and music; intellectual stimulation and UCE community events and activities (potlucks, etc.)

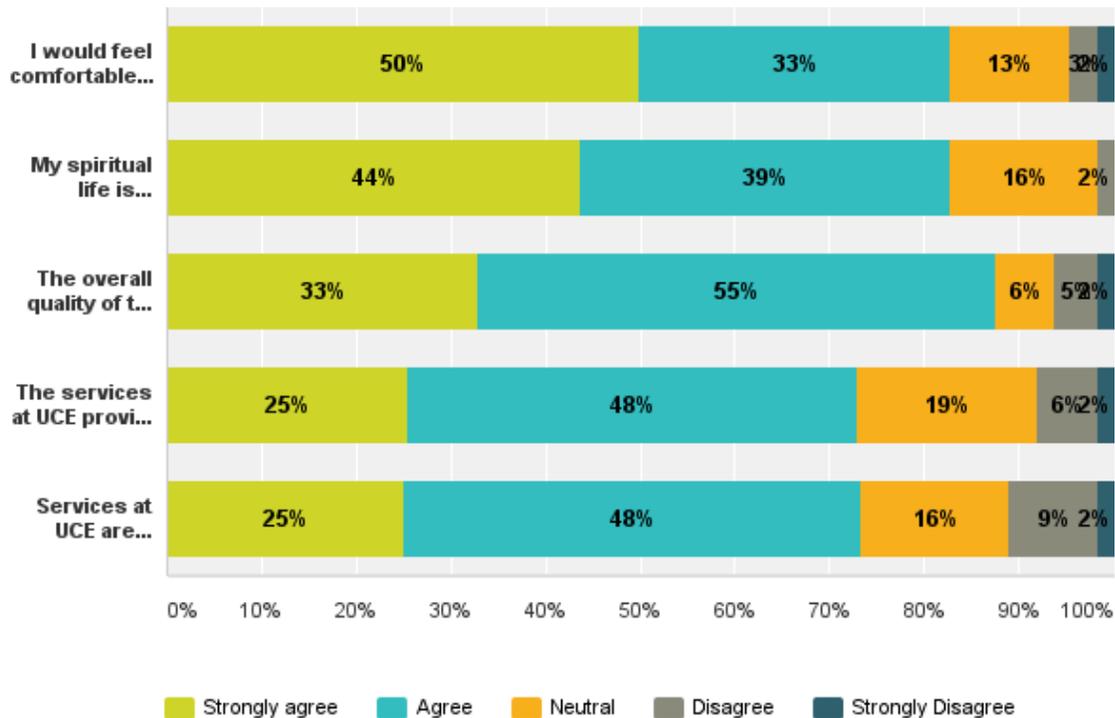
Five most important aspects of UCE



Our Services, Governance and Programs

Church Services

There were high ratings (73% to 88%) for the quality of materials used in services, for the inspirational quality of the services and the positive impact on our spiritual lives. A total of 83% would be comfortable bringing a guest to services.

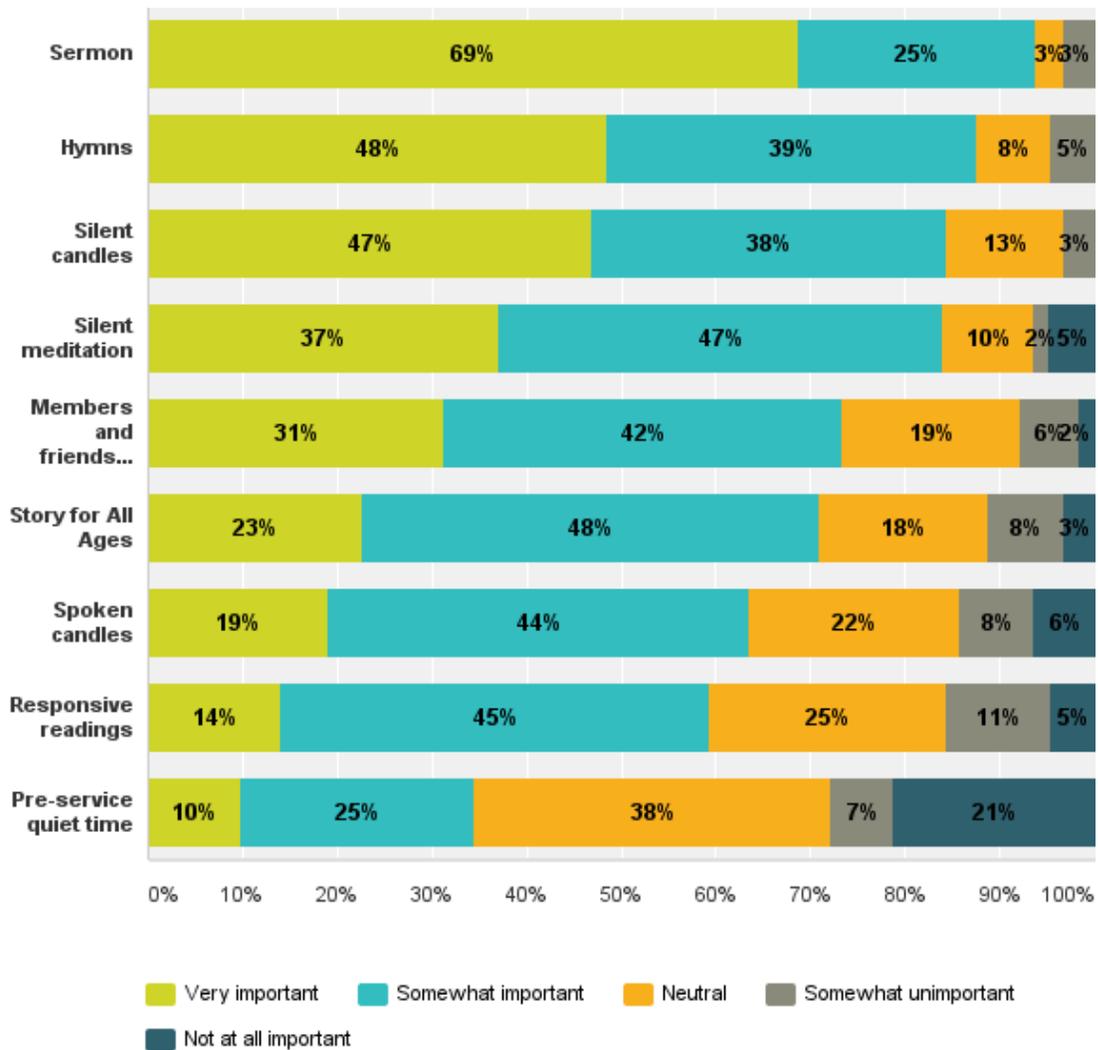


Full labels:

- I would feel comfortable bringing a guest to a service at UCE.
- My spiritual life is stronger and more satisfying because I am involved at UCE.
- The overall quality of the materials we use in services (music, readings, decorations) is satisfying to me.
- The services at UCE provide the challenge and inspiration I need to live out my values in the world.
- Services at UCE are personally satisfying to me.

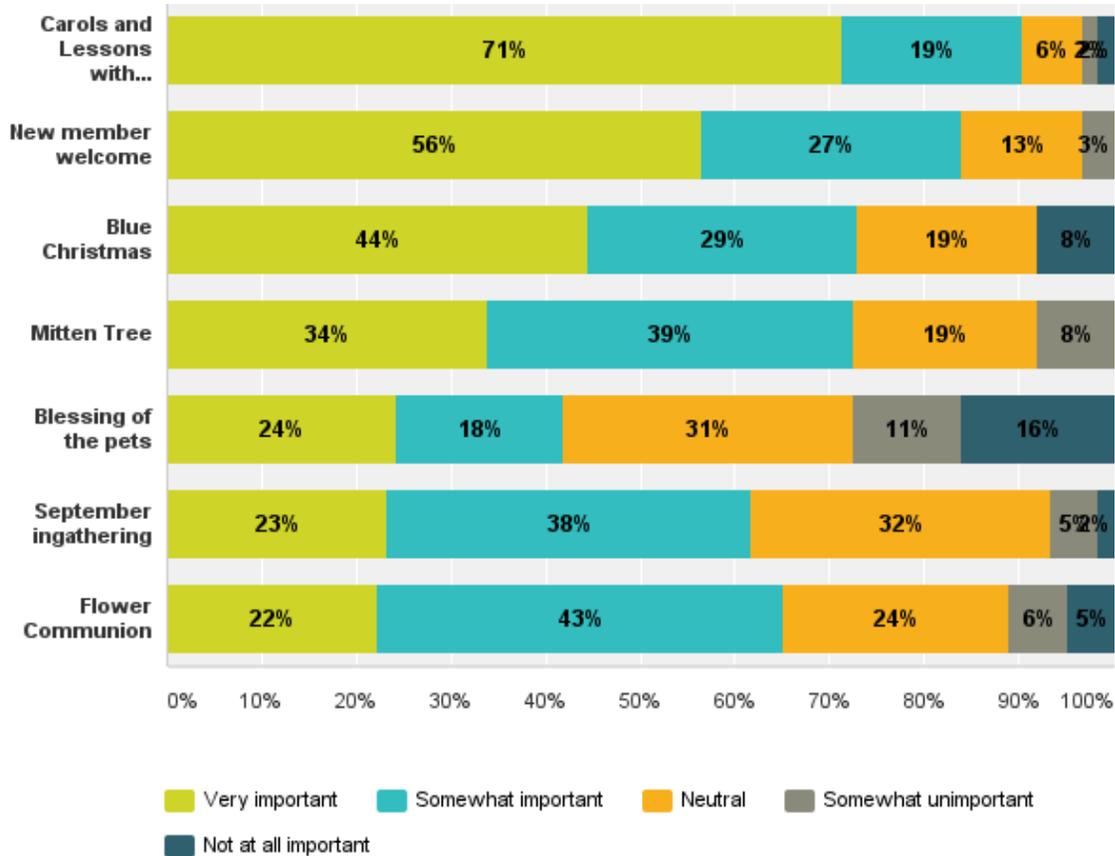
You identified the sermon, hymns, silent candles, silent meditation and members and friends lighting the chalice as the top five elements very important to you in order to have a meaningful service.

Elements necessary for you to have a meaningful Sunday service



Carols and lessons with Chorealais, the new member welcome and Blue Christmas were the top three most important special services to you.

Importance of special services

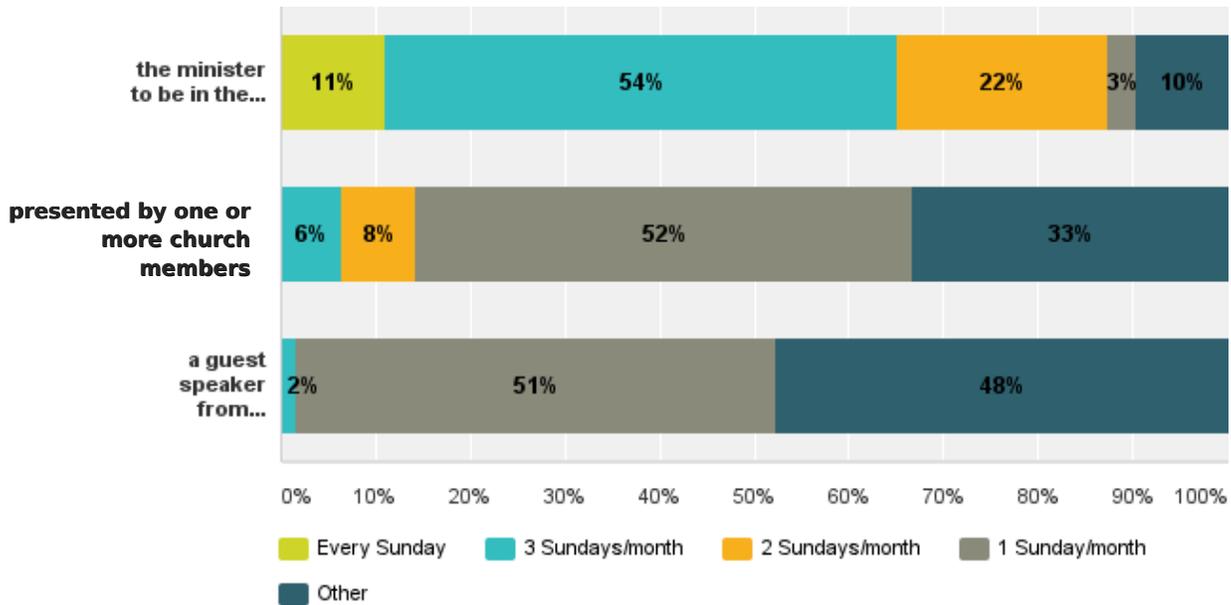


Suggestions for other special service topics included Mother’s Day, Father’s Day, Aboriginal themes, a focus on the environment, Pride, volunteer recognition, peace, social justice, year-ending and year-beginning celebrations, and other faith traditions.

Some commented that you want all cell phones off, no pets, and side bar conversations to stop as you find they distract from church services.

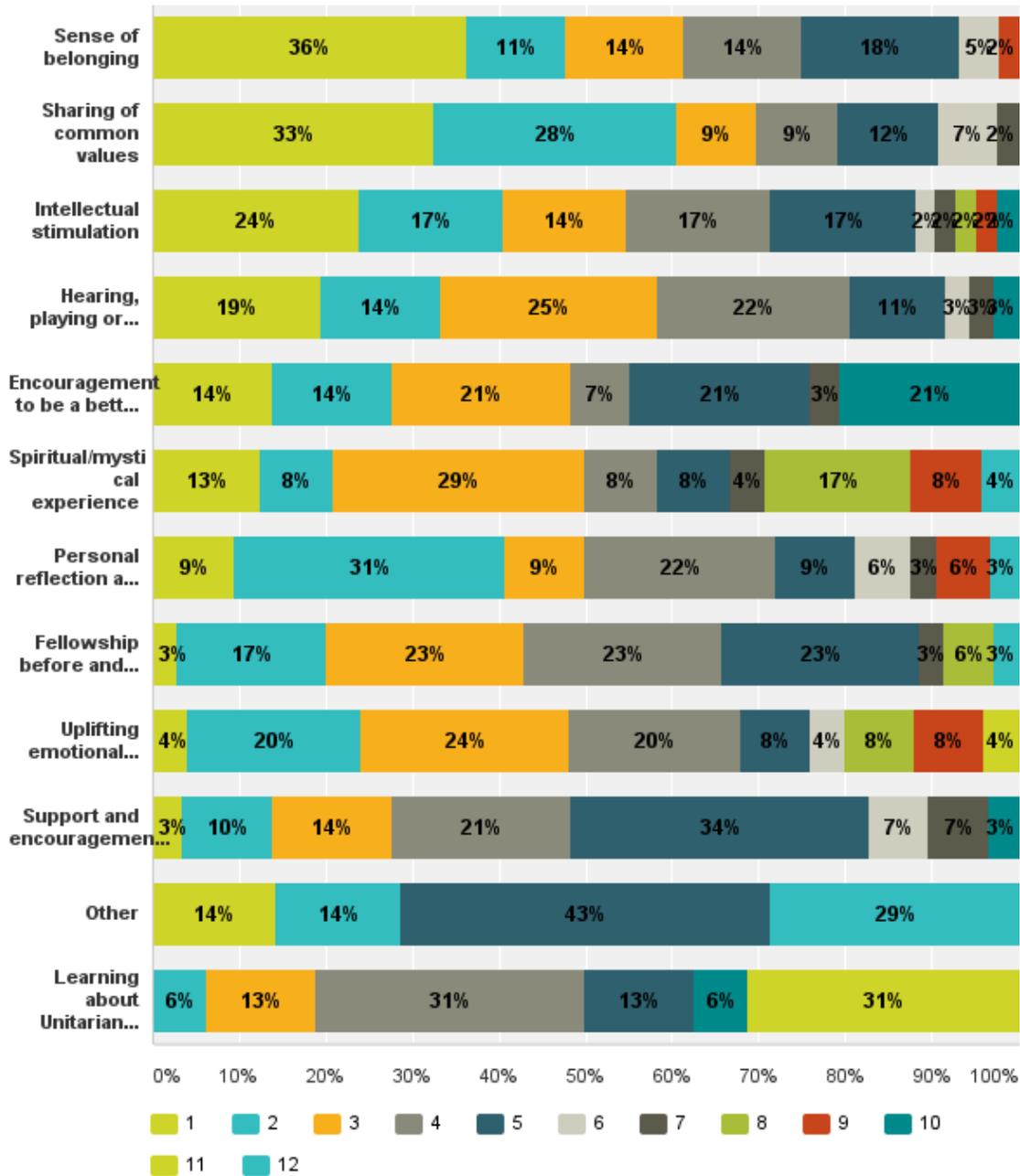
Leading the services

You would like to see the minister in the pulpit 3 Sundays a month (54%) or 2 Sundays a month (22%), with alternate services with presented by church members, and an occasional guest speaker. In the comments, there was support for continuing with member-led summer services.



Top Five Reasons for Attending Services

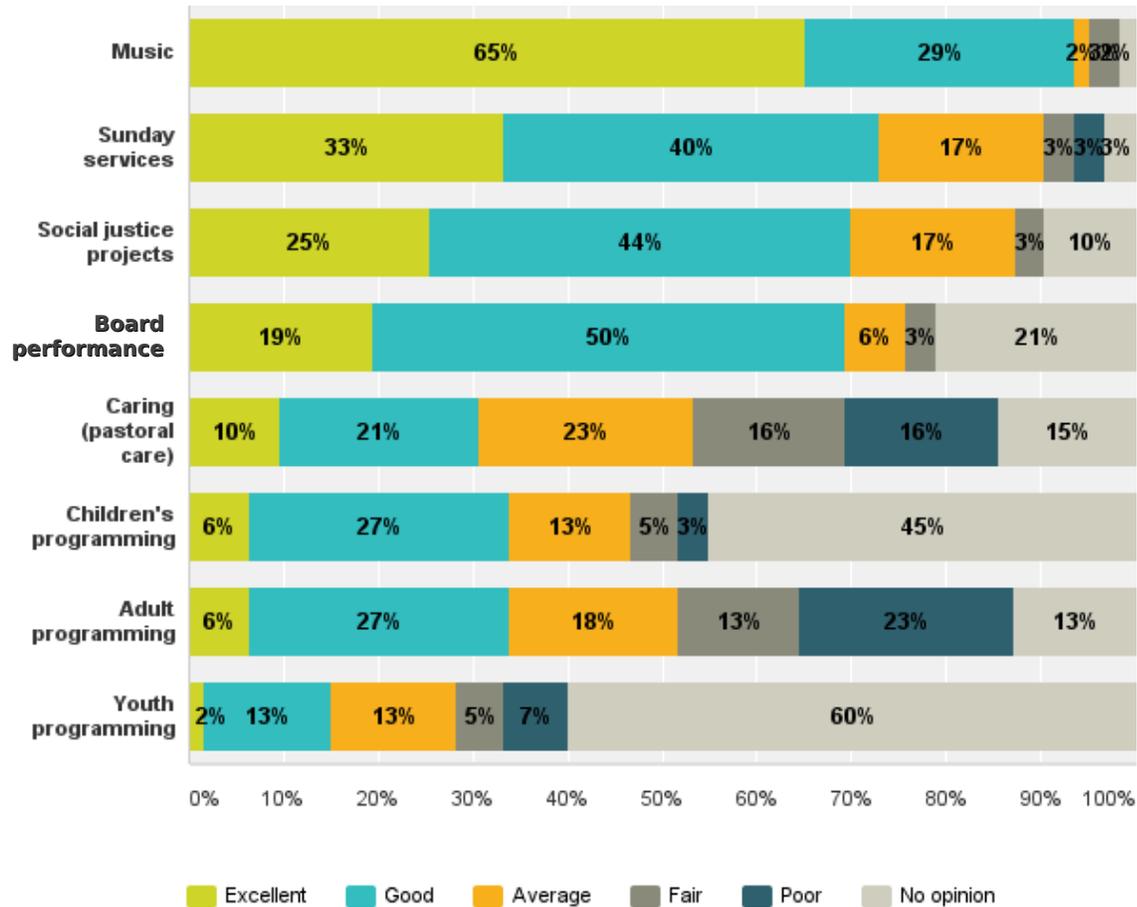
A sense of belonging, sharing of common values, intellectual stimulation, the music and encouragement to be a better person were the top five reasons for attending services.



You rated several broader aspects of UCE from excellent to poor.

Ratings for various aspects of aspects of UCE varied widely.

Pastoral care and adult programming were rated "average to poor" by 55% and 54% respectively. The comments included 31 suggestions for improvement.



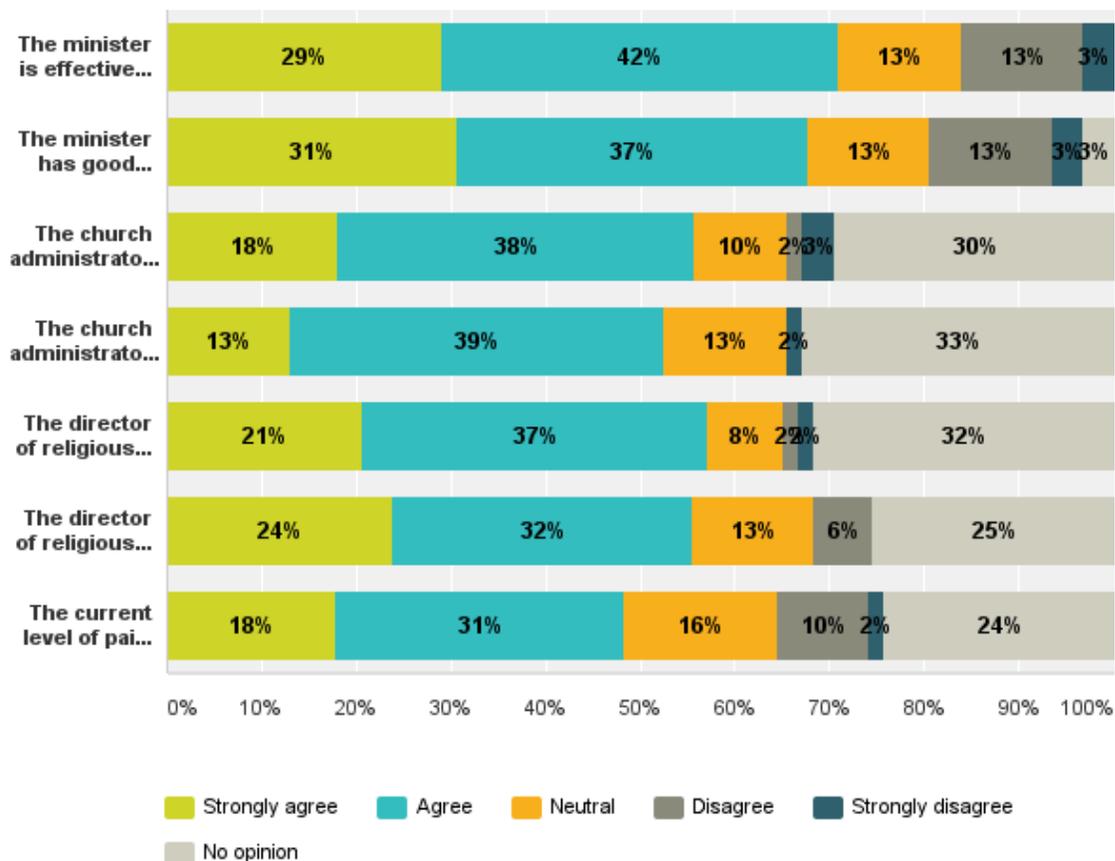
Staffing

There were suggestions that our volunteers and committees could be more effective in their work (pastoral care, for example). A total of 49% thought the current level of staffing was adequate.

You were asked to rate the minister, office administrator and Religious Education director. Note, for the administrator and RE director, over one third of respondents had no opinion or were neutral due to limited interaction with these two staff members staff and the recent start of the administrator.

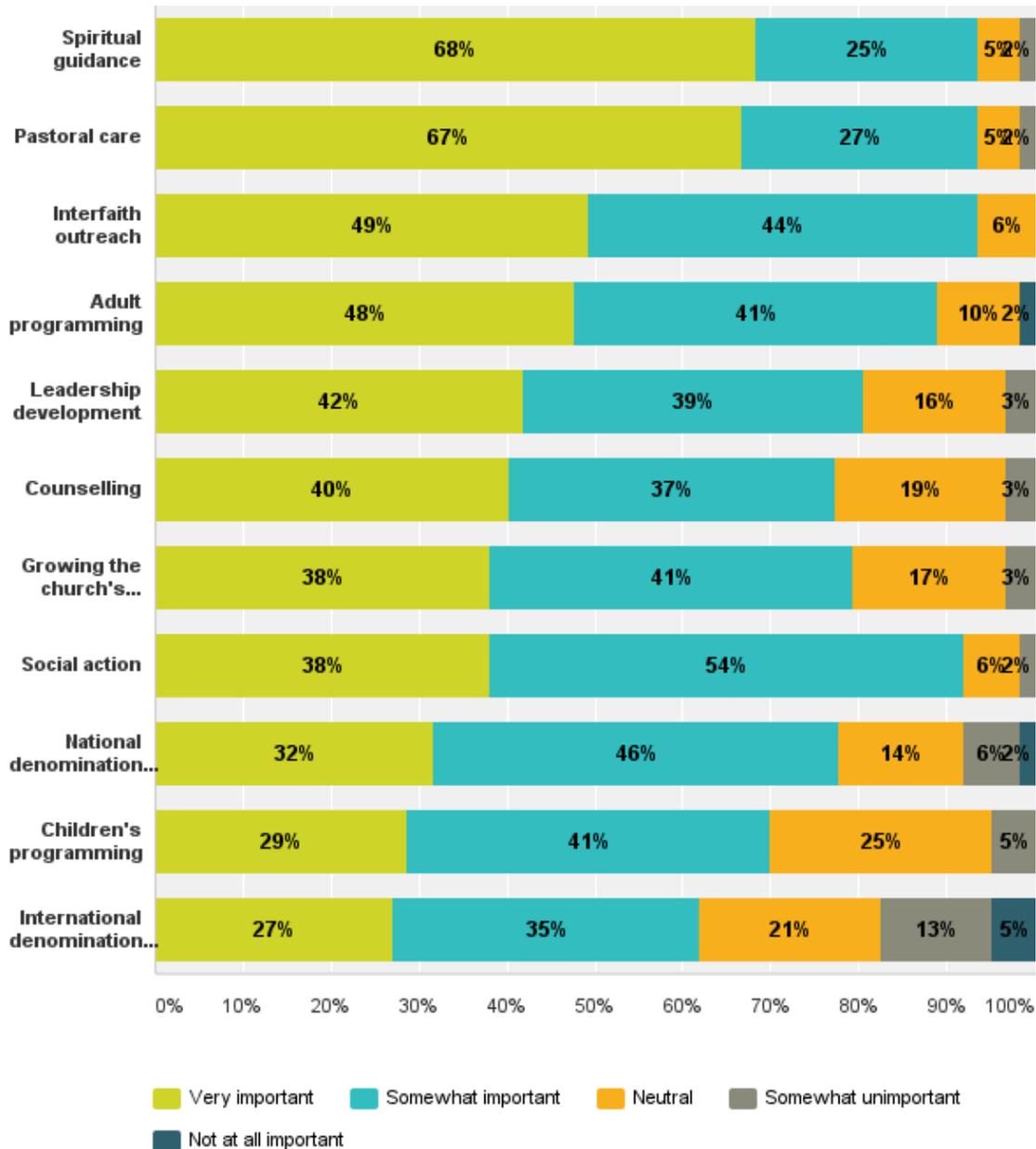
Seventy one per cent (71%) strongly agreed or agreed the minister is effective and 68% felt he has good relationships with the congregation. Of those who responded to the question of the effectiveness of the administrator, 56% thought she was effective, with comments she was new to the job. Those who expressed an opinion reported that the RE director was effective in her work (58%) and had good relationships with members and friends (56%).

Level of agreement with staffing and leadership questions



The comments section focused on how the minister's role could be enhanced, how strengthening RE could be a priority, and some alternative staffing suggestions.

You indicated that it was important to you that the minister be involved in spiritual guidance, pastoral care, interfaith outreach, adult programming, leadership development and counselling. Less important was his involvement in growing the church membership, social action, national denominational activities, children's programming and international denominational activities.

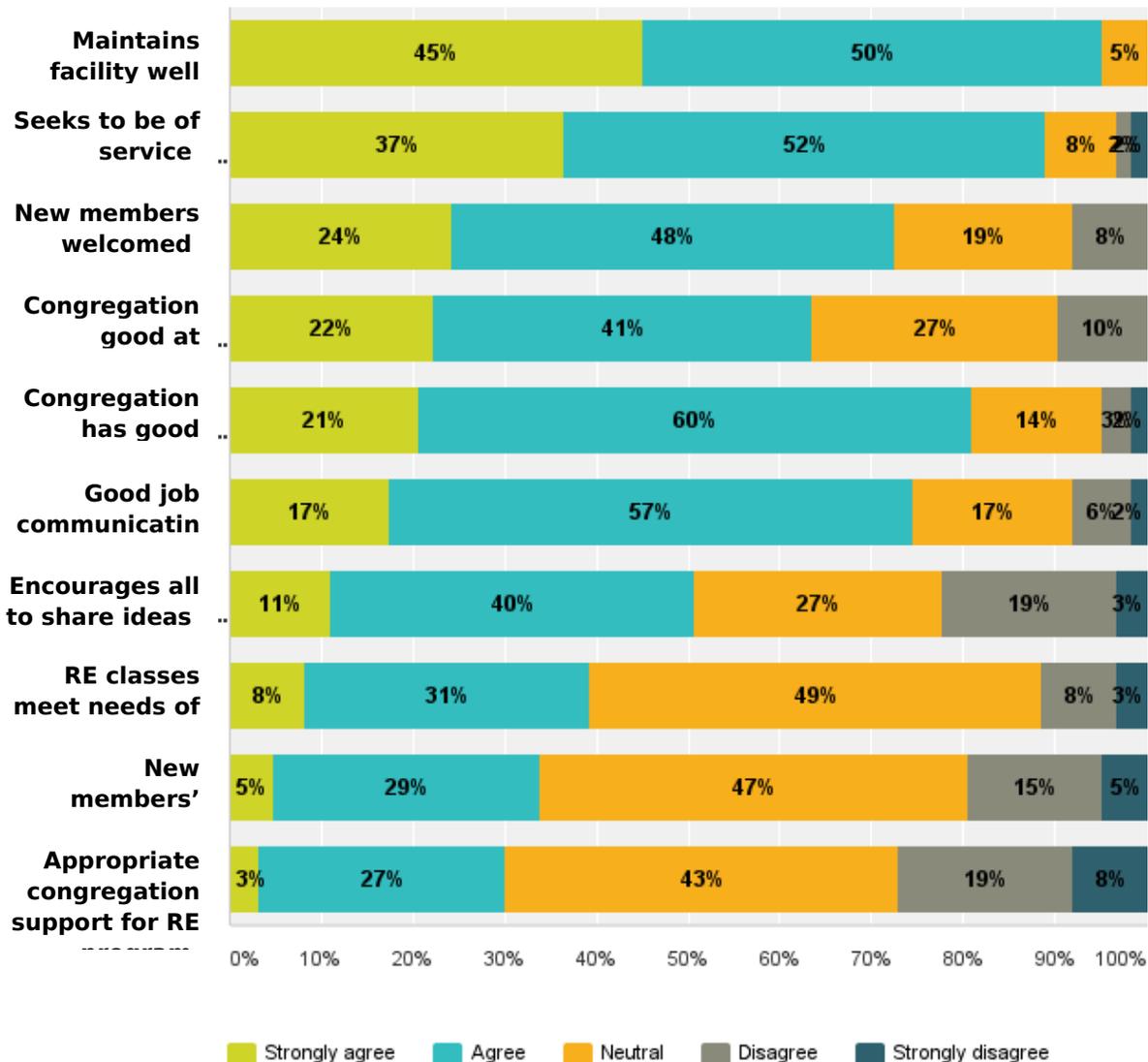


If you had feedback about any of the staff, you generally knew where to take your idea or concern (Ministerial Relations committee, Board, minister), although it is

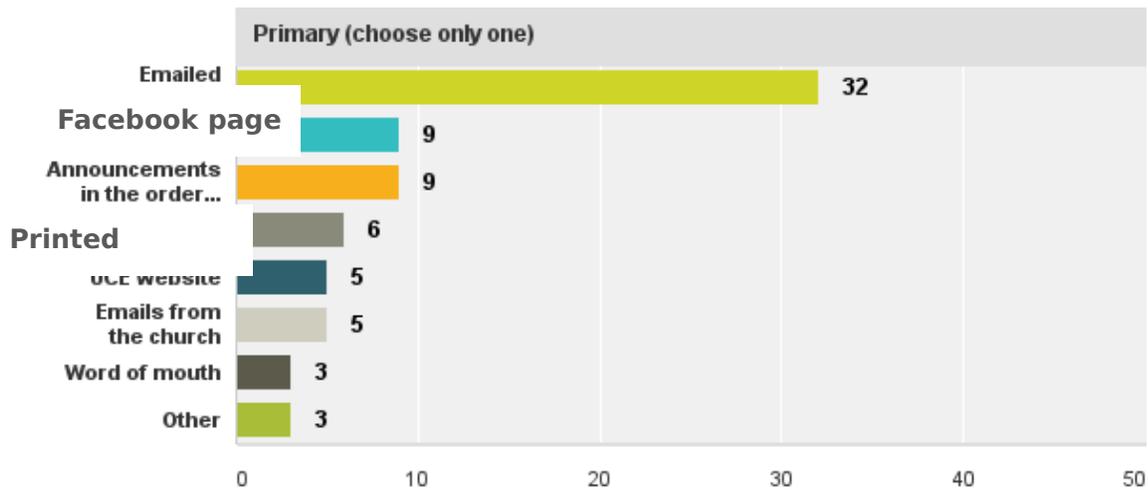
clear that there is room for clearly communicating who the most immediate and appropriate contact should be.

Communication

Respondents gave top marks to how we maintained its facilities (95%). We also do a good job actively seeking ways to be of service to the community and world and report good morale in our community. UCE needs to do a better job of communicating with members and friends and inviting new members to share their talents. There was a suggestion that the board have regular coffee sessions with the congregation to improve communication.



Members and friends primarily stay informed through the newsletter.



Pledging

Responses to the questions about finance and pledging indicated you preferred email solicitation (26 respondents); in-person at church was preferred by 15 respondents. Nothing about pledging turned off 80% of respondents. The vast majority indicated that primary source of funding should be from members. Revenue from renters and casinos was mentioned a few times.

Priority areas for next three years

Several topics were suggested as priorities for the next three years. They include:

- Increase membership (includes more diversity, youth)
- Enhance church services
- Attend to adult/youth programming
- Assist with refugee family
- Complete physical structure
- Attain more financial security
- Prioritize pastoral care