



## Board of Trustees **STRATEGIC PLAN 2018-2022**

### **MISSION**

The Board identifies and advances congregational priorities through strategic planning and operational and financial oversight.

### **VISION**

The Board creates and cultivates the conditions for UUCC to be a spiritual, transforming community.

### **BACKGROUND**

The Unitarian Universalist Congregation of Columbia (UUCC), founded in 1964, is a 450-member religious community with a strong call to love, justice, and reason, and without one central creed. This congregation is home to agnostics, atheists, pagans and humanists, as well as those from Christian, Jewish, and other religious traditions. Through this diverse religious, economic, racial, and cultural perspective, the congregation acts to create beloved community that honors and respects differences in order to give members strength as a people.

The Board of Trustees (Board) and the Executive Team of UUCC developed this strategic plan as the guide for Board efforts to create the conditions for UUCC members to build community and do the work deemed important in the world. The Board engaged in a strategic planning process to accomplish the following:

- Clarify and promote a common understanding of the Board's direction
- Understand and set priorities for leading the UUCC community
- Align Board goals and decisions with UUCC limited resources and priorities
- Establish a baseline for measuring success
- Actively communicate goals to the UUCC community

### **ROLES AND RESPONSIBILITIES**

1. The Board identifies UUCC priorities, develop, and implement the strategic plan. It is accountable to the congregation for regular progress reports.
2. The Executive Team leads UUCC to accomplish the Ends without violating any of the Administrative Limitations. The team includes the Senior Minister and the Executive Director. In turn, they delegate to the paid and volunteer staff who carry out the daily work of the organization. The Executive Team is accountable to the Board of Trustees for the performance of UUCC.
3. Members of the Congregation engage through:
  - Reviewing the Board of Trustees/Executive Team's Strategic Plan and familiarize themselves with the goals and objectives of the work.
  - Support the Board's request for member input on various issues or analyses with their time and talents.
  - Reviewing the Ends monitoring reports for the valuable information the reports provide about Board and Executive Team actions and strategies.
  - Providing constructive feedback, coupled with actionable suggestions for improvement, when possible.

## GOALS AND OBJECTIVES

**Goal 1:** The Board and the Executive Team manage UUCC financial resources through knowledgeable decision-making to ensure the financial health of the congregation.

**Objectives:**

- a) Undertake a review of available resources, such as existing financial statements, reports, and UUA financial planning information, to determine the current state of UUCC finances in preparation for long-term planning.
- b) Develop criteria for evaluating long-term financial needs and program priorities to serve as the basis for long-term financial strategies and planning.
- c) Move toward developing multi-year budgets based on 3- to 5-year program goals, projected resources, and solid understanding of annual fiscal cycles.

**Goal 2:** The Board and the Executive Team provide and implement an effective congregational communications strategy that provides congregants and the larger UUCC community the information they need to engage fully with UUCC.

**Objectives:**

- a) Catalogue available mechanisms/media for UUCC communication and assess/gauge “as-is” use of various forms of communication and typical audiences.
- b) Analyze who needs what information and make recommendations for improved communication both in content and delivery, as needed.
- c) Assess and make recommendations on appropriate mechanisms for members to communicate to Congregational leadership.

**Goal 3:** The Board continuously evaluates how effectively UUCC ministries serve UUCC missions.

**Objectives:**

- a) Evaluate the ends to assure that they fit the needs and expectations, mission, and vision of the congregation and analyze monitoring to determine whether the Board is getting sufficient shared information on which to make decisions about efforts to achieve ends.
- b) Develop recommendations on improvements or changes, if needed, to information sharing on ends monitoring.
- c) Determine what members need to develop a sense of connection and belonging to UUCC.

**Goal 4:** The Board strategizes to support growth for increased UUCC impact.

**Objectives:**

- a) Study large-congregation dynamics documented elsewhere, especially as they pertain to racial, ethnic, socio-economic, age, gender, and LGBTQ diversity. Examine how members' prior religious experience and expectations may affect response to congregational growth.
- b) Use information acquired on large congregational dynamics to inform Board decisions and allocate resources consistent with UUCC missions and priorities as UUCC grows.

**Goal 5:** The Board and Executive Team will develop, as needed, and implement a framework to identify and address recurrent operational issues.

**Objectives:**

- a) Assess the “as-is” collaborative approach between the Executive Team and the Board on operational issues.
- b) Recognizing the informal give and take that occurs in any ongoing operational setting, the Board will determine whether the current approaches to, and outcomes of, collaboration meet Board, Executive Team, and Congregational needs. To the extent required, the Board will develop and implement any improvements in substance or process.