



**Unitarian Universalist  
Congregation of Fairfax**

## MEMO

Date: April 5, 2017

To: The Congregation

From: The UUCF Coordinating Team

Subject: **2017-2020 Strategic Goals, Strategies and Action Plans**

The Coordinating Team is happy to present to you the UUCF strategic plan for 2017-2020, the result of an extensive process of congregational and lay leadership input over multiple years.

This strategic plan does not attempt to cover everything we think is important at UUCF. Rather, its purpose is to focus our attention on the three to five top-level priorities we want to give attention to within the defined time period. Quality worship and the RE program, adult programs, music and arts and regular social justice work are always important and will continue to be given high priority. The four goals in the plan address the areas where we believe we need to grow and change to meet the challenges before us. They can be summarized as:

- Collaborate with area UU congregations to expand the impact of Unitarian Universalism in Northern VA.
- Take new and bold actions to expand the impact of Unitarian Universalism in Fairfax County.
- Increase congregational cultural competency and diversity.
- Focus all we do on furthering the mission of the congregation.

Please take the time to read the plan in detail. We will also introduce the plan at the congregational annual meeting on Jun. 4. In the meantime, if you have questions or comments, send them to [ct@uucf.org](mailto:ct@uucf.org). Thanks.

Unitarian Universalist Congregation of Fairfax - 2016-2020 Strategic Goals

| Item   | Level       | Goals, Strategies, Action Steps  | Measure   | Target Date       | Leader (s)                                  |
|--------|-------------|--|---|-------------------|---|
| I.     | Goal        | <b>Work with local UU congregations to identify innovative ways to share and leverage resources for the purpose of growing Unitarian Universalism in depth, size and impact.</b> |   |                   |   |
| I.A.   | Strategy    | <b><i>Build trust and deepen relationships with UU Congregations of the NOVA cluster.</i></b>  |   |                   |   |
| I.A.1. | Action Step | Leadership to engage with the cluster on an ongoing basis.   |   |                   |   |
| a.     | Sub-actions | Establish clear expectations and responsibilities for the NOVA Cluster Council representative, including regular communications between cluster rep, board and CT.               | Job description developed for cluster rep, including reporting requirements                                   | Jan. 2017         | Denominational Connections Committee        |
| b.     |             | Continue and expand training opportunities with multi-congregation participation (i.e., cluster trustee training, RE teacher training, choral workshops).                        | At least two multi-congregational training events planned and implemented each congregational year            | Jun. 30 each year | Coordinating Team (CT) and program staff    |
| c.     |             | Ministers to continue regular communication and collaboration with other cluster ministers.  |   |                   | Ministers                                   |
| d.     |             | Continue and expand joint social justice related activities (i.e. Higher Ground Moral Action, refugee resettlement).   | At least two multi-congregational social justice initiatives planned and implemented each congregational year | Jun. 30 each year | Rev. David and Social Justice Council (SJC) |
| I.A.2. | Action Step | Explore new opportunities to partner with other congregations in the NOVA Cluster.   |   |                   |   |
| a.     | Sub-actions | Consult with Rev. Foley concerning needs that other congregations in the NOVA cluster have that UUCF might be able to assist with by creating partnerships.                      | Ongoing communication with Rev. Foley   |                   | Ministers                                   |
| b.     |             | Ministers continue to explore opportunities as they interact with other cluster ministers.   | Ongoing communication with cluster ministers  |                   | Ministers                                   |
| I.B.   | Strategy    | <b><i>Share resources with other UU congregations.</i></b>   |   |                   |   |
| I.B.1. | Action Step | Continue and expand sharing of program resources with other cluster congregations.   |   |                   |   |
| a.     | Sub-actions | Continue to arrange joint RE teacher training.   | Joint RE teacher training occurs each year  | Sep. each year    | Director of Religious Exploration (DRE)     |

|        |             |   |   |                            |                                |
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| b.     |             | Publicize Adult Programs to other cluster congregations.  | Mechanism established to share information with other congregations   | Sep. and Jan. of each year | Rev. Laura                     |
| c.     |             | Invite cluster congregations to participate in Wellspring groups.   | Invitation extended annually  |                            | Rev. Laura                     |
| d.     |             | Explore and assess feasibility of other ways our music program can partner with other UU music programs- possibilities include shared choral workshops and concerts, musician swaps and shared music library. | Participate and support Cluster Music Festival each year and at least one other collaborative music initiative planned and realized | Jun. each year             | Director of Music & Arts (DMA) |
| I.B.2. | Action Step | Pursue possibility of shared staffing within the cluster.   |   |                            |                                |
| a.     | Sub-actions | Propose hiring a Social Justice Coordinator to serve multiple cluster congregation within a shared vision/program for social justice work.  | Proposal again shared with cluster ministers  | Jan. 2017                  | Rev. David                     |
| b.     |             | Explore the possibility of sharing accounting/bookkeeping and more general administrative services with cluster congregations.  | Conversations with at least two cluster congregations about this possibility  | Sep. 2017                  | Rev. David                     |
| c.     |             |   |   |                            |                                |

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|---------|-------------|---|--|-------------|---|
| II.     | Goal        | <b>Develop a project or projects that demonstrate and practice UU values in new ways beyond our campus.</b>                               |  |             |   |
| II.A.   | Strategy    | <b><i>Create a community center for gathering and service in a local city center.</i></b>   |  |             |   |
| II.A.1. | Action Step | Conduct a feasibility study.  |  |             | CT  |
| a.      | Sub-actions | Appoint a task force to:  | Task Force appointed   | Jun. 2017   | CT  |
| b.      |             | Identify potential locations.   | Location identified  | Jun. 2018   | Task Force  |
| c.      |             | Identify available resources that can be allocated for this activity.   | Resources required identified  | Jun. 2018   | Task Force  |
| d.      |             | Explore collaboration with other congregations and religious communities.   | Conversations with other UU congregations and other religious communities occurs | Jun. 2018   | Task Force  |
| e.      |             | Prepare a proposal for consideration by leadership and the congregation.  | Written proposal submitted to the Coordinating Team and Board                    | Sep. 2018   | Task Force  |
| II.A.2. | Action Step | Develop an implementation plan and timetable based on the work of the Task Force.   | Written plan prepared  | Jan. 2019   | CT  |
| II.B.   | Strategy    | <b><i>Establish a vibrant and sustainable third service alternative to expand UUCF's capacity to welcome new members and friends.</i></b> |  |             |   |
| II.B.1. | Action Step | Appoint a Task Force to develop an implementation plan.   | Task Force established   | Jan. 2017   | CT  |
| a.      | Sub-actions | Research options and what has proved successful elsewhere.  |  | Jun 2017    | Task Force  |
| b.      |             | Determine the most advantageous time and venue.   | Written proposal developed   | Jun 2017    | Task Force  |
| c.      |             | Develop a recommendation on worship style and children's programming.   | Written proposal developed   | Jun 2017    | Task Force  |
| d.      |             | Develop a staffing plan to include a third minister to give leadership to this initiative.  | Written proposal developed   | Sep. 2017   | CT  |
| II.B.2. | Action Step | Begin programming .   |  | Sep. 2017   | Ministers, Lay Minister (LM) for Worship, other staff |
| a.      | Sub-actions |   |  |             |   |
| b.      |             |   |  |             |   |

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| c.      |             |  |  |                           |                    |
| II.B.3. | Action Step | Evaluate the impact and sustainability of the initiative.  |  |                           |                    |
| a.      | Sub-actions | Appoint an evaluation committee.   | Committee convened   | Jun. 2018                 | CT                 |
| b.      |             | Evaluation designed and completed.   | Written report submitted to the CT   | Sep. 2018                 | Committee          |
| c.      |             |  |  |                           |                    |
| II.C.   | Strategy    | <b><i>Gain proficiency with outreach and public relations.</i></b>   |  |                           |                    |
| II.C.1  | Action Step | Program Evaluation Committee to evaluate UUCF's membership and outreach program.   | Written report with recommendations  | Mar. 2017                 | PEC                |
| II.C.2  | Action Step | Appoint a professional group, led by the Communications Director and Lay Minister for Membership and Outreach, to research and develop a plan to achieve this goal, building on the work of the PEC. |  |                           |                    |
| a.      | Sub-actions | Market research to determine options, costs and expected impact (including UUA sponsored options).   | Written plan developed   | Jun. 2017                 | Professional group |
| b.      |             | Give priority to improving public messaging about UU principles, values and causes and to an expanded online and social media presence.  | Number of people reached; increase in weekly attendance, web, search, and site analytics | Jun. each year thereafter | Professional group |
| c.      |             | Determine staffing/volunteer capacity and training needs.  | Staffing plan prepared   | Sep. 2017                 | Professional group |
| II.C.3  | Action Step | Develop a method for continuous evaluation of communication effectiveness.   | Written plan developed   | Jun. 2018                 | Professional group |
| a.      | Sub-actions |  |  |                           |                    |
| II.D.   | Strategy    | <b><i>Create a rapid response network and procedure to be able to quickly promote UU values in the public sphere and to protect vulnerable people when they are threatened.</i></b>                  |  |                           |                    |
| II.D.1. | Action Step | Develop the proposal and procedure.  | The plan and proposal is approved by the CT  | Apr. 2017                 | Staff              |
| a.      | Sub-actions | Decide what opt-in software to use and activate it.  |  |                           |                    |
| b.      |             |  |  |                           |                    |
| II.D.2. | Action Step | Communicate the plan to the congregation and develop the network.  | 200 congregants sign up to participate in the network                                    | Jun. 2017                 | Staff              |
| II.D.3. | Action Step | Implement the network as needs arise.  | UUCF takes public stances on urgent public policy or safety issues                       | Ongoing                   | CT                 |

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| III.     | Goal        | <b>Intentionally grow our cultural competency in ways that challenge our comfort, expand our awareness and promote social and spiritual healing.</b>   |   |                |   |
| III.A.   | Strategy    | <b><i>Educate and train members and leadership about diverse identities, structural oppression, and privilege.</i></b>   |   |                |   |
| III.A.1. | Action Step | Identify gaps in knowledge and create a training plan .  | At least one congregational educational need identified each year             | Sep. each year | Racial Justice Steering Committee (RJSC)                      |
| a.       | Sub-actions | Provide classes and speakers for the congregation to improve their own cultural competency.  | At least one broad congregational education opportunity implemented each year | Jun. each year | RJSC  |
| b.       |             | Integrate cultural competence training in new member classes, teacher training, leadership development.  | Training segments developed and incorporated into each program                | Sep. 2017      | Ministers, DRE, Leadership Development Team (LDT) Chairperson |
| c.       |             |  |   |                |   |
| III.B.   | Strategy    | <b><i>Partner with local and global organizations to expand awareness and build relationships as a foundation for promoting justice.</i></b>   |   |                |   |
| III.B.1. | Action Step | Identify and reach out to local organizations to explore what UUCF might be able to bring to a relationship. Possible local organizations might be:  | At least one partnership opportunity identified each year                     | Sep. 2017      | RJSC  |
| a.       | Sub-actions | Universities.  |   |                |   |
| b.       |             | Interfaith partnerships.   |   |                |   |
| c.       |             | UU orgs: Beacon House, other UU congregations, The Sanctuaries DC.   |   |                |   |
| III.B.3. | Action Step | Identify and reach out to/deepen our connection with national and global organizations. Possible organizations might be:   | At least one partnership opportunity identified each year                     | Sep. 2017      | RJSC  |
| a.       | Sub-actions | Standing on the Side of Love, UU-United Nations Office, UU Service Committee, UUs for Social Justice, International Council of Unitarians and Universalists, Black Lives of UU, Black Lives Matter, Sanctuaries DMV. |   |                |   |

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| b.       |             |  |  |                             |                              |
| III.C.   | Strategy    | <b><i>Diversify worship, programs, and leadership to better represent our local community and the wider world.</i></b>   |  |                             |                              |
| III.C.1. | Action Step | Diversify our worship practices.   | At least one worship experience each month that highlights diversity                             | Monthly beginning Sep. 2017 | Ministers, Worship Committee |
| a.       | Sub-actions | More use of languages other than English.  |  |                             |                              |
| b.       |             | Guest speakers and worship leaders.  |  |                             |                              |
| c.       |             | Diverse liturgy and music, accessibility for different ages.   |  |                             |                              |
| III.C.2. | Action Step | Diversify UUCF leadership and staff.   |  |                             |                              |
| a.       | Sub-actions | The Nominating Committee to broaden traditional searches for Board, Nominating and Endowment Committees candidates by asking people from underrepresented groups to serve. | Nominating Committee to identify, contact and track efforts to recruit underrepresented groups   | Jun. each year              | Nominating Committee         |
| b.       |             | The Coordinating Team to specifically seek candidates for Lay Ministry, program and committee leadership from underrepresented groups.                                     | Coordinating Team to identify, contact and track efforts to recruit underrepresented groups      | Jun. each year              | CT                           |
| c.       |             | Increase minority representation on staff.   | As positions open, take steps to ensure that minority candidates are included in the hiring pool |                             | CT                           |

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| IV.     | Goal        | <b>Strengthen, streamline and evaluate our focus on mission.</b>   |   |                           |   |
| IV.A.   | Strategy    | <b>Help UUCF group leaders align their groups with the UUCF mission and strategic plan.</b>  |   |                           |   |
| IV.A.1. | Action Step | <b>Develop covenant</b> between UUCF and its groups, including clarity of accountability under lay ministry structure & commitment to serve current & future needs of the congregation based on mission, vision, & strategic plan. |   |                           |   |
| a.      | Sub-actions | Have one-on-one conversations with UUCF small group leaders, sharing hopes and goal of covenanting with small groups, and inviting their feedback.   | Conversations held                              | Fall 2016-<br>Winter 2017 | Rev. Laura, plus LMs as schedule permits    |
| b.      |             | Review learnings from one-on-one conversations and, from there, create process for covenanting.  | Written plan and timeline developed             | Spring 2017               | Rev. Laura & LM for Adult Faith Development |
| c.      |             | Implement process.   | Covenants created                               | 2017-18                   | Rev. Laura & LM for Adult Faith Development |
| IV.A.2. | Action Step | <b>Develop expectation</b> throughout UUCF that groups will regularly self-evaluate on how they are supporting mission, vision and strategic plan.   |   |                           |   |
| a.      | Sub-actions | Develop plan to support each group in process of annual (summer/fall) renewal of covenant between UUCF and group and intention-setting based on mission, vision and strategic plan.  | Written plan developed                          | Spring 2017               | Rev. Laura & LM for Adult Faith Development |
| b.      |             | Develop plan to support each group in process of annual (spring) evaluation of intentions/goals set in the fall.   | Written plan developed                          | Spring 2017               | Rev. Laura & LM for Adult Faith Development |
| c.      |             | Develop reflection questions for new/proposed groups to consider regarding their purpose and activities and how these support the congregation's mission, vision and strategic plan. Develop process/policy on endorsement of      | Questions developed and process created for use | 2016-17                   | Rev. Laura & Lay Ministers Council (LMC)    |



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|         |                 | new groups. Secure buy-in of CT, Board, LMC and implement.  |   |                       |   |
| IV.A.3. | Action Step     | <b>Develop leadership training resources</b> to support leaders in fulfilling these expectations.   |   |                       |   |
| a.      | Sub-actions     | During one-on-one conversations (IV.A.1.a), ask group leaders what resources they would need to do this.  | Conversations held                                    | Fall 2016-Winter 2017 | Rev. Laura, plus LMs as schedule permits  |
| b.      |                 | Process learnings & create resources as needed.   | Resource needs identified and resources created       | Spring-Summer 2017    | Rev. Laura & LM for Adult Faith Development, plus rest of LMC?                  |
| c.      |                 | Create communications plan to share resources with current and future leaders.  | Written plan developed                                | Spring-Summer 2017    | Rev. Laura, LM for Adult Faith Development, communications staff                |
| IV.B.   | <b>Strategy</b> | <b><i>Make it easier for newcomers to live out the UUCF mission through spiritual deepening and meaningful participation in the congregation.</i></b>   |   |                       |   |
| IV.B.1. | Action Step     | Develop a clear message to newcomers about how to become part of the congregation.  |   |                       |   |
| a.      | Sub-actions     | Revamp messaging to newcomers about what we encourage them to do: Clearer path, more coherent and intentional messaging, a few specific steps. When asked, "How do I grow spiritually?" give them a clearer answer. This will involve newcomer and membership classes, websites, training of membership folks ... | Messaging plan created and implemented                | 2017-18               | Member Services Coordinator   |
| b.      |                 | Review Unitarian Universalist Association (UUA) best practices re: website organization for newcomers.  | Review completed                                      | 2017-18 (?)           | Communications staff, Member Services Coordinator, LM for Membership & Outreach |
| IV.B.2. | Action Step     | Develop core curriculum for adults and accompanying communications strategy - who do we hope will take these classes, at what point in their engagement with the congregation?  |   | Fall 2016             | Rev. Laura & LM for Adult Faith Development                                     |
| a.      | Sub-actions     | Develop core curriculum and identify leader or team to "own" it going forward.  | Core curriculum designed<br>Leadership plan developed |                       |   |

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| b.      |             | Develop and implement communications plan.  | Communications plan developed and implemented |             |  |
| IV.B.3. | Action Step | Support spiritual grounding in challenging times.   |   | 2017-18     | Rev. Laura & LM for Adult Faith Development  |
| a.      | Sub-actions | Develop and maintain webpage/brochure on UUCF resources for spiritual grounding (e.g., classes, workshops, readings.)   | Publications developed, posted, & maintained. | Spring 2017 | LM for Adult Faith Development   |
| b.      |             | Create new learning opportunities re: spiritual practices and/or other spiritual grounding tools.   | Classes developed & offered.                  | 2017-18     | Rev. Laura, LM for Adult Faith Development, Adult Programs Committee                                 |
| c.      |             | Strengthen communication and coordinate efforts in this area among Adult Programs, Membership & Outreach lay ministry and Leadership Development Team (LDT).        | Communication channels developed.             | 2017-18     | Rev. Laura, LMs for Adult Faith Development and Membership & Outreach, Adult Programs Committee, LDT |
| IV.C.   | Strategy    | <b><i>Explore new technologies to support congregants in living out our mission and reduce barriers to engagement.</i></b>  |   |             |  |
| IV.C.1. | Action Step | Review staffing configuration to increase skills/capacity in this area.   |   | 2016-17     | Program Evaluation Committee (PEC), CT   |
| a.      | Sub-actions | Review Membership & Outreach ministry.  | Report completed                              | Mar. 2017   | PEC  |
| b.      |             | Develop staffing plan based on PEC report.  | Plan developed                                | Apr. 2017   | CT   |
| c.      |             |   |   |             |  |
| IV.C.2. | Action Step | Use technology to help us reach out to congregants who are becoming less engaged.   |   | 2017-18     | Member Services Coordinator  |
| a.      | Sub-actions | Explore technologies to track attendance; develop system of alerts when congregants haven't participated in a while; develop protocols of reaching out in response. |   |             |  |
| b.      |             |   |   |             |  |
| c.      |             |   |   |             |  |
| IV.C.3. | Action Step | Develop functional, useful system of tracking member skills & interests.  |   | 2016-17     | Member Services Coordinator  |

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| a. | Sub-actions | Update volunteer skills and interests survey.   | Survey updated                               | Fall 2016 |  |
| b. |             | Promote survey completion.  | Survey campaign designed and implemented     | Fall 2016 |  |
| c. |             | Work with Lay Ministers and group leaders to ensure appropriate follow-ups to requests to get involved. | Follow-up procedures created and implemented | Fall 2016 |  |