

CHARGE TO THE STRATEGIC PLANNING TEAM

The Board of Trustees of the Unitarian Church in Summit, NJ hereby charges a Strategic Planning Team with leading the congregation in the creation of a Strategic Plan that will define the church's strategic direction for the next five years. As discussed in detail in the Explanatory Comments, the Board charges the Planning Team to lead the congregation through a discovery process that will enable the congregation to revisit its mission and purpose by addressing four driving questions and, upon the completion of that process, to articulate both the mission of our congregation and a strategy for achieving that mission:

- 1. How do we wish to affect the lives of our members and to what end?**
- 2. What is our mission in our community and the World?**
- 3. How do we share the joys we receive as members of this congregation with others seeking such a religion?**
- 4. What changes, including physical, leadership and governance structure, are we willing to undertake to fulfill our larger mission?**

EXPLANATORY COMMENTS

In early 2011, the Board of Trustees of the Unitarian Church in Summit, NJ resolved to examine our congregation's shared sense of values and aspirations in a detailed planning process and to develop a Strategic Plan looking forward five years. If this congregation is to continue to thrive as a sanctuary for those seeking rational, deep and joyful liberal religious theology, the Board believes a clear understanding of our mission is necessary to empower decision-making about how we invest and allocate our resources.

The Board believes in the power of the many, over the few. We believe our best ideas come when we conceive and act on them together. While we understand that communal discovery processes can take longer than other modes of decision making, we view the investment as worthwhile, and welcome the many benefits that will flow from the collaboration and ownership gained during the process. Additionally, the reflection and enrichment gained by new and long-time members should strengthen the community's overall health.

We anticipate that the Strategic Plan that emerges from this discovery process will enable the congregation to move forward purposefully and intentionally. It will be an operational guide for present decision-making, a monitoring tool to keep us on track, as well as a retrospective assessment tool. Possessing benchmarks to measure our progress will increase awareness of what our priorities are, what we need to accomplish them, and when we need to complete them.

While many members may find satisfaction with the current state of congregational life, ongoing changes in the format of traditional church structures, technological advances, economic uncertainty and continuing social change compel our recognition, and offer both challenge and opportunity. The broader Unitarian Universalist movement has witnessed several years of declining membership. If we are to remain a vibrant, thriving spiritual home for future generations, the time is now to think in fresh and creative ways about our congregation's ministry, about how to share it with those who are seeking a community such as ours, and about what we can do further the promise and the possibility of a liberal religious voice in the American religious landscape. We need to turn the tide, in a bold way, that only the power of shared aspirations can fuel.

We are not here for ourselves. We are here for those who will come and for what they will do. We must carve out a way to make room for more people to share in the abundance of this religious community, and to infect the World with their spirit and energy.

The Driving Questions

The Board developed four driving questions to focus the Planning Team's work. These questions are aimed at articulating a vision for UCS's ministry and identifying a strategy for achieving that vision:

1. How do we wish to affect the lives of our members and to what end?

If our goal as a religious community is to help our members do the work of "growing a soul" or walking the path toward ever deeper, richer and more mature spirituality, what do we think that means? What does it look like to have a person in such a setting? How are they affected and what are the fruits of that work, by which we judge whether we are doing it well?

2. What is our mission in our community and the World?

We can have individual calls and missions -- often those grow out of our own individual lives and experiences, but our religion offers us an opportunity to do even more. Our theology embodies a commitment to social action, to making a difference in the world, to sharing our bounty and our energies with others .

What is our shared power for good, service, and advocacy in the larger community and World? What will we do with it?

3. How do we share the joys we receive as members of this congregation with others seeking such a religion?

Coming out of our own gratitude and awareness of what we found when we first entered this community and Unitarian Universalism, how do we make sure others -- now

and for generations to come -- can find the same for themselves? This is the question that forces us to be part of and ever expanding circle of giving and receiving of this faith tradition, not its end. The question reflects our concern for how we steward this community and Unitarian Universalism for the next generation and for how we spread the faith. And, this question drives us to the intimate work of welcoming those who enter our doors with open arms by making room for them literally and in the spirit of our community.

4. What changes, including physical, leadership and governance structure, are we willing to undertake to fulfill our larger mission?

There has to be a moment of fierce, honest reckoning -- about the risks of change, and sacrifice, but also about the immense possibilities -- before we can begin, in earnest, to pledge ourselves to what we have discerned together as our hopes and dreams for our community and our lives of faith. Only then can we begin with any hope of achieving what we seek.

This is where the rubber hits the road: What will it take spiritually, materially, and culturally to get to this place we have envisioned, and are we willing to undergo the transformations necessary?

Specific Responsibilities

The Planning Team is charged to:

- Conduct a comprehensive discovery process to hear the congregation's hopes, dreams, fears and concerns about the purposes and future of this congregation, as well as to understand how we can best serve each other, our community and the World. This process should be as inclusive and energizing as possible, seeking input from the wider circle of involved and concerned groups and members. The process should consider all aspects of church life.
- Distill the data gathered in the discernment process to a list of core priorities and desired outcomes.
- Keep the congregation educated and informed, using multimedia efforts, about the purposes of the strategic planning initiative, what is being heard and the progress of the planning in the context of the larger church life.
- Identify external and internal forces, such as community demographics, membership statistics and finances, that are likely to have an impact on UCS in the next five years or so. Consider strengths and opportunities, threats and weaknesses.
- Prepare a Strategic Plan, with a specific vision and mission, as well as recommended goals and objectives that are actionable, measurable and capable of being accomplished.
- Propose a series of next steps for the Board to consider in deciding how to implement the recommendations of the Strategic Plan.

TIMETABLE: Summer 2011– Fall 2012

The Planning Team will give progress reports to the Board at each regular monthly Board meeting throughout the process.

The Plan will be submitted first to the Board and then the congregation for adoption at a Special Meeting called for that purpose by the Board.

Strategic Planning Team Sunset

Upon completion of the Strategic Plan, the Planning Team should cease to exist as currently named and staffed. After adoption, one or more groups will be recruited and charged by the Board to work on the implementation of the Plan.

Board Support

The Board commits to support the Planning Team in its efforts by assigning two members to the Planning Team, participating in leader retreats as requested, leading attending and participating in congregation wide discovery events, aggressively spreading the good news about our efforts, and allocating the funding necessary to support the effort.

Members

The core team will be comprised of 7 individuals, including the Parish Minister and two Board members. The work will be fortified by internal and external advisors, consultants, and facilitators.

Adopted by the Board of Trustees of the Unitarian Church in Summit, August 15, 2011