

Introduction

This plan is developed in response to a number of factors:

- 1) The 2007-2009 Strategic Plan was successful in providing a focus for our members, leadership, and staff during this critical period. UUCT owes a debt of gratitude to the developers of that plan. While we did not achieve each objective outlined we did accomplish most.
- 2) A Strategic Plan is forward thinking; an operational guide for the present; a monitoring tool to keep us on track; and a retrospective assessment tool. Having benchmarks to measure our progress increases awareness of what our tasks are, when we need to complete them, and what we accomplished.
- 3) The Board of Trustees extended the last Strategic Plan an additional year to allow time to accomplish objectives. This next Strategic Plan is a four-year plan to extend from the church years ending in 2011 through 2014.
- 4) Having a plan and a vision enables us to move forward purposefully and intentionally and measure successes.

This next Strategic Plan is oriented toward furthering deployment of our energy and resources as stated in our existing **MISSION-COVENANT STATEMENT**. The plan again sets forth a **VISION** of what we want our church to become.

The ten sections of this plan focus on specific aspects of the Unitarian Universalist Church of Tucson. Each section has one or more *GOALS*. Within each Goal, specific measurable *BENCHMARKS* are defined. Under Policy Governance the Empowerment Team will implement the plan. Roles of the Board of Trustees include monitoring progress toward achieving goals against the benchmarks; making changes as needed; and

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communicating progress to the congregation. Benchmarks are measurable and obtainable. They encourage us to reach for the possible and not accept the easily achievable. It is possible that some benchmarks may not be met. Other benchmarks will be exceeded or met earlier than anticipated. We believe that stretching ourselves and dreaming is more important than achieving 100% of all targets. Target dates are for the Annual Meeting in the year mentioned.

The Board of Trustees will monitor the Empowerment Teams implementation of the Strategic Plan on the following schedule:

- January - Worship
- February - Community Outreach
- March - Leadership Development
- April - Social Action
- May - Facilities
- June - Governance
- September Community Building (Within the Larger UU Congregation)
- October - Lifespan Faith Development
- November - Community Building (Within our Congregation)
- December - Finance

MISSION-COVENANT STATEMENT

This sacred community is rooted in our search for meaning guided by personal experience, diverse religious traditions, and scientific discovery. We are varied as the blooms in the Sonoran Desert, yet draw strength from one another. Envisioning a world where justice and compassion cross all borders, we pledge energy and resources to transform ourselves, this community and the world around us.

VISION

The church exists for a transcendent and holy purpose, which is to grow souls and transform lives within its walls and beyond. Fulfillment of this purpose is the one and only true measure of success.

We envision a day when:

Our "Green Sanctuary" is recognized locally and within the UUA as a congregation that has transformed its 60-year old physical campus into an environmentally sustainable, technologically advanced, place of worship. Celebrated as a congregation that speaks out and acts decisively on issues of religious intolerance, discrimination in all its forms, and humanitarian issues affecting our border region, the sanctuary is filled to capacity for Sunday Services. Our called minister continues to provide sermons that are intellectually stimulating and draw from different religions, traditions, scientific discovery and personal experiences. Outstanding musical contributions from Family Singers, Desert Chorale, and additional musicians from within and outside the church enrich the worship experience.

Our vision for the future and strength of our programs for all ages has our Religious Education program for children brimming, and congregants energized and participating. We maintain a steady growth with low membership turnover and new people joining. Pledging members and friends have contributed generously to the operating budget which generates an

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annual surplus that, along with a healthy Planned Giving and Endowment program, ensures the future of UUCT for generations.

A dedicated and enthusiastic staff, with adequate budgeted hours, along with strong, numerous, diversified, and eager lay leaders assure our congregation a full range of programs including adult faith development, religious education for youth, pastoral care, social action, and opportunities for fellowship. Our members participate actively in ALL aspects of our operations. Church leaders, staff, and the congregation work collaboratively within a governance system that is open, synergistic, and transparent. Actions, events, decisions, opportunities, and conditions are communicated openly and frequently, enabling trust and collaboration.

Being a member of UUCT is an opportunity for transformative growth and enriching service that contributes to making our congregation, community, nation and planet sustainable.

Worship

Worship experiences are an essential component of our religious experience, nourishing our faith beliefs and providing us the opportunity to reflect on our principles and celebrate within the embrace of community.

Worship Goal #1:

Increased worship services will be available to meet different worship style and scheduling needs. Additional services will allow us the opportunity to provide varying worship experiences - with different music, meditation options, languages, and presentation styles to meet and attract persons seeking a different religious experience. Different service times will offer options for those who cannot attend currently scheduled services.

Benchmark:

- By the end of 2013, there will be, in addition to regular Sunday services, one or more alternate worship services offered each week September through May.

Worship Goal #2:

We will be creative in the use of ministerial staff including an Associate Minister and an Intern. An Associate Minister extends our capacity for "ministering" to our congregation. A ministerial intern is a person nearing the end of the process to become a UU Minister. By engaging a ministerial intern, we help the UUA and ourselves. We supervise and evaluate the intern and benefit by having additional ministerial resources applied to us.

Benchmarks:

- By the end of 2011, the congregation will have a plan to engage a ministerial intern.
- By the end of 2011, we will have instituted a plan in preparation for our minister's Sabbatical in 2013
- By the end of 2012, the congregation will have a plan to provide additional pastoral care and/or other ministry to the congregation

Worship Goal #3:

For many of our members, friends, and visitors, Sunday is the central event in the church experience. For some of these, Sunday is the total of their involvement with UUCT. Appropriately, a large portion of paid and volunteer effort is dedicated to preparing for and creating the Sunday experience.

Benchmarks:

- By the end of 2012, attendance at services will increase by 10% over average attendance in 2009.
- By the end of 2012, the Worship Associate program will have a 10% increase in trained lay leaders.
- By the end of 2014, we will have expanded our professional music staff program to be able to meet the growing needs of the congregation.

Lifespan Faith Development

(Religious Education for Children/Youth & Adult Faith Development)

Our lifespan learning community seeks to nurture and stimulate the spiritual, intellectual, emotional, and social growth of people of all ages, stages of faith, and levels of religious experience.

We envision a program that is rooted in a free and responsible search for meaning that through the thoughts and actions of our lives, transforms us, our community, and our world.

Lifespan Faith Development Goal #1:

We have a comprehensive and integrated set of programs that addresses the congregation's spiritual needs at all ages and during life's important milestones. The LFD Program will be woven with the following strands: (1) Unitarian Universalist Identity and Beliefs, emphasizing our UU Principles, including Green Sanctuary, history, heritage, and evolution of our faith; (2) Sources of Wisdom, honoring the many sources of our Living Tradition; (3) Life Transitions, providing a UU perspective for understanding, honoring, and celebrating life changes; (4) Evolving Faith, continually developing and articulating one's UU beliefs and practices and integrating them into one's own life; (5) Ministry and Leadership, exploring interests, developing skills, and sharing gifts with others to transform ourselves, our community, and the world.

Benchmarks:

- Ongoing: Annually, Lifespan Faith Development will re-assess offerings to children, youth and adults. They will use a tool of their own design. At least annually, results will be shared with the congregation (and/or leadership) and utilized by LFD to modify future offerings.
- Ongoing: We will have adequate volunteer and paid staff LFD to offer a comprehensive and integrated set of programs.
- Ongoing: We will continue to sponsor intentional small group ministry opportunities to maximize the potential for engaging members.

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- By the end of 2013 participation in small group ministry will increase by 15%. Small group ministry opportunities may include groups such as Covenant Circles, UU Christians, Touch Our Soul, and Circles of Trust.
- By the end of 2013, 70% of our adult members will have attended at least one Adult Faith Development program.
- From 2011 - 2014 and beyond we will offer programming using *Green Sanctuary Guidelines* for both youth and adults as part of our rotation of programs.

Lifespan Faith Development Goal #2:

Grow a more balanced congregation by attracting young adults and families with children and youth.

- By the end of 2013 there will be a 15% increase in families with children and youth enrolled in Religious Education.
- By the end of 2011 we will offer one course intentionally planned for young adults
- By the end of 2012 we will offer two courses intentionally planned for young adults such as *Articulating Our UU Faith*, *Young Adult OWL*, a parenting class, etc.

Community Building
(Within our Congregation)

We strive to embrace our church community in a hospitable manner. Community in our church begins when visitors walk through our doors and extends to all members in various stages of their lives. We welcome and embrace existing members as well as integrating visitors and new members into our church family.

Community Building Goal:

We have an active and enriching Community Life program of social support activities for individuals and families of all ages.

Benchmarks:

- Ongoing: Visitors will be welcomed and integrated into our community using radical hospitality principles. Follow-ups will be made within 30 days to all visitors leaving contact information.
- Ongoing: New members will be integrated utilizing the New Member Pathway program.
- Ongoing: We continue to build community with at least two social opportunities available monthly including at least one multi-generational family oriented event.
- Ongoing: We integrate our Covenant of Right Relations into all of our activities.
- By the end of 2012, we will have a documented active program to reach out to members who are in need or have stopped attending. Follow-up calls and interviews will be conducted within 60 days of unexpected dropouts. Data will be collected on reasons for families no longer attending the church and an action plan will be put in place for addressing those reasons for leaving.

Community Building

(Within the Larger UU Congregation)

While UUCT is independent, we derive benefits from our membership in the Pacific Southwest District and the Unitarian Universalist Association of Congregations. Thru the UUA, we have a presence in the United Nations and our capitol. Also, thru the UU Service Committee, we participate in worldwide humanitarian efforts. We strengthen our ties and take advantage of benefits that flow to us in the form of expert advice, consultants, and grants.

Community Building within the Larger UU Congregation Goal:

By participating at the national and district level, we will further our vision and mission as well as strengthening the UU movement.

Benchmarks:

- Ongoing: We will continue to contribute our yearly dues to the UUA and PSWD at the Fair Share level based on our then current membership level.
- By the end of 2011, UUCT will have applied for at least one grant from the UUA or PSWD to further our vision.
- By the end of 2012, we will have 25% of our members enrolled in the Chalice Lighters program of PSWD.
- By the end of 2012, we will have received at least one Grant.
- By the end of 2012, we will offer at least one program highlighting and sharing our Green Sanctuary progress within the district or nationally.
- By the end of 2013, we will present at least one workshop/lecture at a district or national meeting.
- By the end of 2014, we will have at least two of our members participating at the district or national level.
- By the end of 2014, we will have been received official recognition of Green Sanctuary status by UUA.

Leadership Development **(Staff and Volunteers)**

There are a variety of leadership opportunities within the church. Professional paid staff provides continuity and structure to UUCT ministerial and administrative functions. Volunteers include elected, appointed and volunteer positions. Staff and volunteers are empowered with the authority necessary to accomplish the goals developed for their positions and operate within an environment where the lines of authority are clear. They function as a team, where goals are shared, communications are clear, and working relationships are collaborative.

Leadership Development Goal #1:

Recognizing that the quality of congregational life is dependent on adequate, balanced, well-trained, fairly compensated and strongly motivated church staff and volunteers we commit to coordinate and support the work of our leadership.

Benchmarks:

- Ongoing: Staff will be compensated in accordance with UUA Fair Compensation Guidelines and UUCT will be recognized as a "Committed Fair Compensation Congregation".
- By the end of 2011, we will establish a method of formally recognizing the contributions of all staff and volunteers annually.
- By the end of 2012, we will have established a method for continuous evaluation of our professional staffing mix to include an action plan for modifications and adjustments as appropriate to support our mission.
- By the end of 2013, we will be recognized as a "Practicing Fair Compensation Congregation".

Leadership Development Goal #2:

The Nominating and Leadership Development Team will help prepare and integrate more of our membership into leadership positions.

Benchmarks:

- Ongoing: There will continue to be at least two leadership development opportunities offered yearly at UUCT.
- By the end of 2012, at least 20% of nominated positions will be members who have not previously served in an elected position.
- By the end of 2013, our fully functioning updatable data base system (non-financial) about members will include participation in church activities, roles served, participation in committees, and gifts/skills to offer.
- By the end of 2013, the data base will be populated and a system will be in place for continual updating with both staff and volunteers trained in using the system.
- By the end of 2014, all elected and appointed leaders will attend at least two leadership development opportunities offered at UUCT

Community Outreach

This section is dedicated to outreach activities in Tucson and southern Arizona. We aspire to increase awareness of unique issues impacting our congregation and community within a Unitarian Universalist context. By our outreach efforts we make others aware of what our faith offers.

Community Outreach goal #1:

We have elevated our UU principles within greater Tucson's faith community and the community at large.

Benchmarks:

- By the end of 2012, we will actively participate in a minimum of two community wide events demonstrating our UU point of view.
- By the end of 2013, the congregation will sponsor, financially support, or otherwise participate in two or more inter-faith campaigns on local humanitarian or social issues of concern in Southern Arizona.
- By the end of 2014, the congregation will sponsor at least one project, event or presentation based on Green Sanctuary and sustainable living.

Community Outreach Goal #2:

We will actively support our ministry No More Deaths at local, regional and national levels.

Benchmarks:

- By the end of 2011, we will sponsor awareness trips to the border for UUs from other areas to learn first hand about border issues and the work of NMD. This may include home hospitality.
- By the end of 2013, we will host a national UU sponsored event highlighting a UU perspective on border issues and the work of NMD. This will be oriented to a non-UU audience.

Community Outreach Goal #3:

We will actively reach out to the local community to serve people who find a like minded faith community at UUCT.

Benchmarks:

- By the end of 2011, we will have a Social Networking site
- By the end of 2012, we will have a radio ministry
- By the end of 2012, we will have an advertising committee promoting awareness of the UU church. Considerations will include advertising on NPR and other liberal media listened to by our membership and potential new members, bumper stickers, and brochures and banners for public events.
- By the end of 2012, we will have signage on 22nd street that displays our faith (ex. Our church name, NMD, Standing on the Side of Love, UU principles, etc)
- By the end of 2014, we will offer at least one worship service at a satellite location in the greater Tucson community.

Social Action

Our congregation is committed to the work of social action guided by justice and compassion. We take steps to make our Social Justice activities visible within the congregation and in the broader Tucson community through partnerships with other social justice organizations - local and national. We envision Social Justice as an outreach ministry to those who have no voice, including the poor and working poor, people of color, and immigrants. Involvement in social justice offers opportunities for transformation in our community and the world, as well as for the involved individuals.

Social Action Goal #1:

We demonstrate financial commitment to Social Action as an integral part of our worship experience.

Benchmarks:

- Ongoing: we will "share the plate" once monthly - giving 60% of the non-pledge collection to selected local charities and services in need.
- By the end of 2012, we will increase our existing pledge to Interfaith Community Services by 10%

Social Action Goal # 2:

We demonstrate an appreciation of and sensitivity to the history, current needs, strengths and resources of groups in our community who historically have been underserved and under-represented by our church.

Benchmarks:

- By the end of 2011, the Committee on Ministry will have completed an assessment of congregation's progress and attitudes towards becoming an anti-oppressive, anti-racist, multicultural community.
- By the end of 2011, we will have sponsored a "Social Justice Empowerment" workshop for Arizona UUs to assess the quality of our social justice programs and to determine how we can more effectively put our faith into action.

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- By the end of 2012, we will have implemented the "Living the Welcoming Congregation" curriculum in order to deepen and expand our "Welcoming Congregation" status.
- By the end of 2013, we will implement "Identity-Based Programming and Advocacy" based on resources from the UUA's Identity-Based Ministries.
- By the end of 2014, the Committee on Ministry will re-evaluate the congregation's progress towards multicultural competency.

Social Action Goal # 3:

A Social Justice Committee within UUCT will offer structure, support and guidelines to allow the congregation a variety of opportunities to participate in social justice issues that impact our congregation, our faith community, and the greater Tucson area.

Benchmarks:

- By the end of 2011, the Social Justice Committee will have someone to take minutes of its monthly meeting and will make those minutes available to the congregation through church publications and/or the website.
- By the end of 2011, the Social Justice Committee will begin developing relationships with community organizations and interfaith groups around social justice issues of shared concern, and also select specific issues, projects and groups with which to partner in the coming year, focusing on issues connected to racial justice, human rights, economic justice, peace and environmental action.
- By the end of 2011, in order to make Social Justice more effective and volunteer opportunities more visible within the congregation, we will explore the creation of a permanent Social Justice Committee.
- By the end of 2012, the (permanent) Social Justice Committee will set up two or three meetings per year with students and faculty at the University of Arizona campus to inquire what social justice issues they are most interested in and begin to network with U of A social justice groups on issues of shared concern. It will also invite

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students and faculty to speak at the church on social justice issues and to attend Sunday services at UUCT.

- By the end of 2013, the Social Justice Committee will expand its work to include educational forums and programs, community service, social witness (vigils and nonviolent marches, rallies), social advocacy for social justice issues and joining community-organizing coalitions.

Facilities

We will continue to maintain and repair our current buildings and grounds. We will address future space needs and plan for expansion as appropriate. We will consider Green Sanctuary guidelines as we make improvements or additions to our facility.

Facilities Goal #1:

We are committed to becoming recognized by UUA as a Green Sanctuary.

Benchmark:

- By the end of 2013, we will have received official recognition for completing the Green Sanctuary Program.

Facilities Goal #2:

We are committed to repair and maintain our existing facilities.

Benchmarks:

- By the end of 2011, we will have begun a Capital Campaign around transforming our space utilizing Green Sanctuary guidelines and green and sustainable principles
- By the end of 2012, Our Stewardship campaign will provide for donations to a capital reserve fund.
- By the end of 2012, we will have developed a plan to provide sufficient space for membership growth
- By the end of 2012, we will have fully investigated the feasibility of purchasing adjacent property.

Finances

Achieving our objectives is dependent upon financial commitment to our vision and mission. We envision a fully funded staff and the financial resources we need to realize our dreams.

Finance Goal 1:

Orient our Stewardship Campaign to gaining members pledges directed toward realizing our Vision rather than maintaining the status quo.

Benchmarks:

- By the end of 2013, we will increase both our average and mean pledges. 50% of our income will come from 50% of our pledged members.
- By the end of 2014, our Stewardship campaign will run year round and include annual pledges to the operating fund, pledges to a reserve fund, endowment pledges, and planned giving.

Finance Goal 2:

Realizing our Vision cannot be attained solely via yearly pledges we have developed and implemented plans for improving our financial base. These plans include but are not limited to a capital campaign and mortgaging enhancements to our facility.

Benchmarks:

- By the end of 2011, we will have utilized a UUA Capital Campaign Consultant
- By the end of 2011, we will have established and have commitments through Planned Giving
- By the end of 2012, we will have a 20% increase in our Endowment funds.
- By the end of 2013, we will have launched a Capital Campaign
- By the end of 2014, we will have an operating expense reserve
- By the end of 2014, we will have a Capital expense reserve

Finance Goal 3:

Further stabilize and improve our financial management process to provide stability and transparency.

Benchmarks:

- By the end of 2011, we will have a plan to ensure continuity in the roles of Treasurer and Financial Secretary. This plan will include defined policies and procedures for each office as well as a procedure for replacing members filling these roles as needed.
- By the end of 2011, we will have a plan for obtaining needed software to implement financial processes.
- By the end of 2011, we will have financial reports that allow interested members to obtain information about the financial status of UUCT. These reports will be "transparent" in that a member will not require financial expertise to understand the information provided.

Note: Pledging information about individuals will be restricted to a "need to know" basis.

- By the end of 2014, we will have a coordinated system for all finance functions: endowment, planned giving, fund raisers, grant writing, expenses management, budgeting, bookkeeping and Stewardship.

Governance

Church leaders, staff and the congregation work collaboratively within a governance system that is open, synergistic, and transparent. Actions, events, decisions, opportunities, and conditions are communicated openly and frequently thus enabling trust and collaboration.

Governance Goal #1:

Policy Governance is implemented within UUCT to enable management systems to function smoothly.

Benchmarks

- By the end of 2011, the relationship between ET and the Finance Committee will be clarified regarding budget preparation, spending on items not budgeted, stewardship, and restricted funds.
- By the end of 2011, a personnel committee will be established with a written job description. This committee will adopt procedures for personnel hiring and management of personnel files

Governance Goal #2:

The congregation feels involved in church governance and trusts elected and appointed leadership to make decisions that promote long-term sustainability of the congregation. Leadership is committed to effectively communicate with each other and with the congregation within the spirit of our Covenant of Right Relations. A variety of communication systems will be utilized to maximize opportunities for openness and transparency.

Benchmarks

- By the end of 2011, the president of the congregation will write a monthly column for the newsletter.
- By the end of 2011, a financial report is published monthly in the newsletter.
- By the end of 2011, there is at least a semi-annual forum offered by the BOT where congregants can raise and discuss issues of governance and management of the church.
- By the end of 2011, the Bulletin Board is kept up to date with leader names, positions, photos and contact information.

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- By the end of 2011, approved minutes of governance groups, including but not limited to BOT, ET and Finance Committee, will be posted on the UUCT Web site.
- By the end of 2012, a weekly update to the church email list will recap sermon titles, weekly events, news about church members and friends, as well as news of interest to church members.

Governance Goal #3

To improve financial stability of the congregation, income sources are diversified.

Benchmarks

- By the end of 2011, existing fund raising efforts will continue including stewardship, and other church oriented fund raisers such as the auction, book sale, cabaret, trips, etc. These are limited only by the imagination of church members.
- By the end of 2011, a plan will be developed for a nationally oriented fundraiser.
- By the end of 2012, the above-developed fundraising plan will be implemented.
- By the end of 2013, instituting a fund raising event that involves the broader community.