



Strategic Plan 2016-2020

First Unitarian Universalist Congregation of Ann Arbor



“Looking ahead is much like driving at night on dark and curvy roads. The headlights of insight show only the next 200 yards, never the long-view. The headlights may show the immediate potholes and obstacles but never the troubles and never the beauty that lies way ahead. That view is found only in moving down the road together.” – Rev. Gail R. Geisenhainer sermon “The NEXT 150 Years of Reason and Compassion in Action: Got Vision?”, presented April 12, 2015.

Where are we in mid-2016?

We know who we have been in the past.

During 2014-15 we celebrated our congregation’s 150th anniversary and spent the year learning more about who we have been during our rather bold history - starting with our abolitionist founders, through early leaders in women’s rights, later as the supporters for the very beginnings of Michigan’s labor unions, playing a key role in the Humanist movement, providing support to Japanese citizens during WWII, working together to end segregated housing in Ann Arbor in the 60s, providing sanctuary to a family from El Salvador in the 80s, welcoming and supporting the LGBTQ community from the early 90s on, and more recently showing our tangible commitment to clean energy, initiating efforts to reach out to immigrants in our community and supporting Black Lives Matter.

For our first eighty years from 1865-1945 we served as a missionary church to the University of Michigan.

We have been builders, constructing church buildings in 1882 and 1999 and adding a wing to our Washtenaw church in 1956. Two of our churches are designated historic buildings.

We have called eleven men and one woman as senior ministers. Six of them stayed with us for over a decade two for over twenty years.

While our membership numbers have waxed and waned, we have kept a caring committed liberal religious community together for 151 years.

We know who we are today.

As the Reverend Vanessa Southern said during our 150th Anniversary Service of Commissioning, “You’ve got something good here! Do you **know** that?”

In mid-2016 the UUAA congregation is a vibrant, energetic, caring community in a sound financial position, with steady membership and robust participation in our children’s programming. We have a large, involved YRUU group. Our music and social justice ministries thrive and are recognized in our wider community. We have active, involved men’s programming. We now have sound long range planning for our building and grounds. Visitors to our church can see the outward symbols that speak to who we are:

- the rainbow flag of welcome to people of all gender identities flies from our entryway;
- Some people refer to our 90-foot-tall wind turbine as our steeple;
- A rotating solar panel stands in the prairie grass in front of the church, collecting renewable solar energy;
- In back of the church there are walking trails, an inviting children's playground and a memorial garden.

Visitors to our web site and Facebook page get a good glimpse of congregational life, values and vision, but this is an area where we could improve our public face and expand our on-line reach to more people.

There is much in-progress work moving along well. Our most obvious area of focus is our ministerial transition following the March announcement by our Senior Minister, Rev. Gail R. Geisenhainer that she will retire and move out of the area in August, 2016.

We have a very creative and talented staff that was recently downsized and is currently experimenting with more collaborative work distribution and more team approaches to tasks. Member Ed Lynn has ably served us as a volunteer interim administrator during our staff reconfiguration and has been reassigning duties of the Executive Director position that was eliminated last year. The time is approaching for Ed to transition out of that volunteer job and transfer his remaining roles to paid staff. We need to better sort out the responsibilities for building maintenance and leadership for the “Our Land for Worship” team.

Our pastoral care ministries have fallen into disarray and need rebuilding. Lay leaders have begun this task but it needs long term infrastructure as a core ministry of the congregation.

We recently hired a part time Assistant Minister for Spiritual Growth and Development (SGD) to coordinate the SGD activities that had been lay-led during the year-long absence of a director. We hope to re-establish that as a full time position in the near future.

We have just started two Finance committees to oversee and guide UUAA fund raising and to monitor and audit our finances. We need to make sure these committees take root and serve the congregation well.

Last but perhaps most important, our policy governance has become muddled and needs to be re-visited so that the Board has clear responsibilities for monitoring the health and progress of the congregation, and the staff, especially the Senior Minister have clear goals and responsibilities.

We have gathered new visions of where we are headed.

Our Core Values and UU Principles provide UUAA with the basis of our vision.

We held visioning activities during our 2014-15 anniversary year that build on our past Sankofa and strategic planning projects to help us look down the road to our next chapter.

In 2015 we held a “Dawning Future” panel discussion with some visiting leaders of the UU movement. We held a Service of Commissioning for our next 150 years. Our invited guests looked at us from the outside and gave us their visions of where UUAA should be going. Some of their advice included:

- expanding our identity as a UU congregation -- to engage more with our UU regional and national dialogs and programming and to recognize our role as a resource to other UU congregations
- expanding our reach by providing a supportive on-line community for more loosely connected circles of people who live far away or are shut in or feel marginalized and need our ministry. One of our May 16th Dawning Future Panelists said "The best ministry will be a blend of online and offline—a world evangelicals have created, but Unitarian Universalists are just beginning to imagine."
- deepening our commitment to our in-person community, deepening our connections with one another
- finding new financial support outside of pledging while working toward more robust pledging from current members
- keeping alive and alert to the world around us and responding to the issues of our times
- finding energy and deep joy in our ministries

At an April 12th congregational forum on our future, suggestions from congregants included: Having a higher profile in the Ann Arbor community (how do people find us?); Themes and more lay voices in services; More outside collaborations and interfaith activities (for example with groups like the Interfaith Council for Peace and Justice); More events with family focus.

In her April 12th sermon quoted earlier, Rev. Geisenhainer urged us to teach one another how to be effective leaders of change. She quoted former minister Rev. Erv Gaede who said on our 100th anniversary that “all of us will be challenged to think deeply, to work creatively, and to love bravely.” We need to empower our lay and ministerial leaders to “come alive” on justice issues that have passion behind them.

Planning for 2016-2020

Having pulled off the road for a bit to review where we've been and do some maintenance on our finances and staffing, it's time to get back into the car and resume our road trip to the dawning future. Time to reprogram the GPS, turn up the music and joyfully adventure off to start finding "*the troubles and ... the beauty that lie way ahead*" in our next 150 years together.

The Board of Trustees Strategic Planning Task Force interviewed staff and lay leaders to assess our current strengths and weaknesses. We also reviewed our Core Values and different visions of our future created during our 150th anniversary year in the form of sermons, a "Dawning Future" forum, a panel discussion and other presentations. And we reviewed previous strategic planning documents "Faith in Our Future" and "Strengthening Our Connections" to further assess where we stand in our ongoing planning. We propose the following strategic goals and specific actions to achieve the goals.

Our expectation is that these goals will be reviewed yearly and completely revisited during or before the year 2020. We recommend that the Board Vice President be charged with overseeing the review and communication of the strategic plan.

Goal #1 – To carry out a graceful, positive, energized ministerial transition

Over the next three years some of our work together is clear; By the time this plan is adopted, we will have started our ministerial transition period and will have hired an Interim Senior Minister.

Transparent Processes: We want to keep all ministerial transition processes transparent so that the congregation feels they are well informed and have a voice in the transition activities.

Minimize Disruption: Our 2005-2008 ministerial transition came after a 25-year ministry and a time period where UUAA was just coming to understand our status as a "large church". This transition included a complete staff turnover, many institutional and worship service changes and a significant loss of membership and pledging. We are in a much better place for transition in 2016. We hope this time to minimize staff changes and avoid major disruptions so that congregants can remain engaged in our many thriving UUAA programs. Having gone through a transition 10 years ago, we are wiser about things we can do to help keep our community strong. Many of the goals and actions in this document would further this goal as well: community building activities, family activities, marketing our congregation to ourselves as well as others, keeping strong worship services, music programs, SGD programs and very visible social justice programs all strengthen our sense of community.

Maximize Community Involvement: Community building events and promoting a culture of gratitude are to be encouraged as good things in themselves, but also ways to help keep us all thinking about the importance of our membership in UUAA.

Cultivate Joy: While change always brings anxiety, it also brings exciting new possibilities. We can emphasize the positive and encourage our programs to plan positive community events.

Specific Actions

Between now (June 2016) and the Fall of 2018 we will be in ministerial transition and will need to

1. **Sincere Goodbyes:** Give an appreciative all-congregation farewell to Rev. Geisenhainer and her partner Celeste Deroche
2. **Hire, welcome and support an Interim Senior Minister**
3. **Settled Minister Search:** Carry out a search for our next outstanding, UUAA-compatible Senior Minister, following the timeline and procedures established by the UUA.
4. **Enthusiastically welcome, install, orient and work in collaboration with the 13th Senior Minister of UUAA**
5. **Communicate well about the transition:** Set up a web page and newsletter column to communicate transition information to the whole congregation and make sure all events or requests for member input are posted on the web site, newsletter, Facebook, and other media as appropriate.
6. **Strengthen Community:** Encourage staff and program leaders to plan all-congregation activities and events to strengthen our sense of community.
7. **Build Pride:** Encourage staff and lay leaders to find ways to spotlight congregational achievements and to express gratitude that strengthens appreciation for our community.

Goal #2 – To clarify the governance of UUAA; to update the specifics of the Senior Minister’s role as Executive prior to calling a new minister.

In 2008 our congregation joined many other congregations in adopting a Policy Based Governance system. Eight years later we find that we have had to adapt many of our original expectations for the way the Board and the Senior Minister actually share responsibilities. We also find that the Board is not following its monitoring schedule and the Senior Minister is not informing the board on some of the issues she is charged to report about. While the administration of the UUAA operates reasonably smoothly, there are always questions about who is responsible for making decisions. The Board is not fulfilling its duties to monitor the health and wellbeing of UUAA. Clarifying our governance would make strategic decision making easier, oversight more responsible and the job descriptions of Board members and ministers (notably an incoming called Senior Minister) more understandable and more satisfying for leaders. The congregation could better understand how to get things done.

Specific Actions

1. **Revise our Policy Governance:** We need a blue ribbon governance task force to study and learn about the governance structures and policies of other congregations our size (best practices) and recommend changes. The task force would review our 2008 policy governance document and our bylaws and recommend changes. A major goal should be to have a clear and realistic job description in place for our new Senior Minister.
2. **Board of Trustees Monitoring:** The current monitoring schedule in our Governing Policies document does not fit our congregation’s needs. The Board needs to monitor the administration and finances of the UUAA and even more importantly, monitor the health of the congregation and our progress in living our Core Values, our reason for being. A new monitoring schedule needs to be adopted and added to our Governing Policies document as soon as is practical. The Board needs to consider ways to measure progress toward living our core values.

3. **Communicate a Clear Explanation Our Governance:** Once revised, the Board and the governance task force should be able to describe UUAA governance to the congregation and others with a simple and clear description on our web site and made available in other ways as appropriate.

Goal #3 – To promote and expand UUAA music ministries.

UUAA's Music Ministries have become a vibrant part of worship services and community life. Our Director of Music is becoming known regionally and nationally in the UU movement. Appreciating and expanding our music programming can build community, bring UUAA special recognition and enhance the spiritual life of the congregation.

Specific Actions

1. **The "Geisenhainer Music Fund"** has been established to honor Rev. Geisenhainer's work with UUAA's music ministries and to expand our music programming with a community outreach arm. The Board needs to support the Music Director in
 - a. Setting up a GMF oversight committee and structure.
 - b. Helping that committee set goals and launch community outreach projects.
 - c. Helping that committee set goals for fund raising to sustain the programs
2. **Provide Resources:** We want to build on this excellent UUAA strength by making sure our Music Director and music programs have the resources they need going forward.
3. **Provide Equipment:** We have recently improved the acoustics and sound system in our sanctuary and now we need to further upgrade our equipment by acquiring a new piano. The current piano limits our rental opportunities and limits the types of musical events that can take place at UUAA. The first goal of the Geisenhainer Music Fund is to acquire an already identified Steinway piano.

Goal #4 – To Market Our UUAA Congregation

Some of the work to be done to attract an outstanding Senior Minister is also work toward our vision for greater outreach to more circles of UUAA friends, and work toward internal community building. We need to update our web site and use of social media such as Facebook. We need more professional looking presentation of our congregation's many excellent programs, our beautiful building and land and our supportive community. We need to explore how to bring ministry to people who are seeking our help on-line.

Specific Actions

1. **Establish a short term Communications Task Force** charged to evaluate our current public face and recommend ways to improve our on-line presence and general public relations tools. The task force would include people with expertise in web development, social media use, photography, videography, writing and with the core values of our congregation.
 - a. Provide recommendations for updating the look of uuaa.org and listen to staff suggestions on ways to make the site easier to use.
 - b. Identify new content needed, specifically for ministerial candidates. New content such as a video tour of the building, short videos about our programs.
 - c. Outline an action plan and identify people who can help execute the plan.

2. **Establish Libraries** of a. artwork, b. photographs, c. videos, and d. stock text about congregational events, building, land, staff, etc. for use in all types of communications. We now have more tools such as Google apps available and more experience thru our 150th celebrations to make this happen.

Goal #5 – To improve our oversight and development of fund raising and improve overall financial processes.

Thanks in large part to our current Senior Minister, Rev. Geisenhainer and our Interim Administrator, Ed Lynn, our 2016 budget is balanced, we have made good progress on paying down and renegotiating our mortgage and we have paid off small loans and consolidated our endowments. We need to put processes in place to assure good stewardship of our financial resources into the future.

Specific Actions

1. **Develop a UUAA Finance Team:** Two finance committees were recently formed, one to oversee fund raising at UUAA and one to monitor financial processes and oversee audits. The Board is charged with evaluating the structure and effectiveness of the committees on a defined schedule. For the Finance Team a specific goal is to finish documenting processes in order to perform a formal audit (and recommend the type of audit appropriate to UUAA).
2. **Develop a UUAA Fund Raising Team:** In the case of the fund raising committee, monitoring success includes determining whether the committee can make our fund raising more diverse, sustainable and grateful to supporters.
3. **Board Evaluation of Finance Teams:** The Board is scheduled to decide in 2017 whether the Finance teams should become standing committees reporting to both the Board and the Senior Minister. (During the trial period they officially report to the Senior Minister.) Bylaw changes will be required to make them standing committees.
4. **Fair Share Giving:** The Finance Team should establish a plan for eventually becoming a fair share contributor to the UUA and MidAmerica Region. This will strengthen our connection to our larger UU community and help toward our vision of playing a greater role regionally and nationally.
5. **Communication:** The congregation needs to remain aware of how their contributions are spent and why they are so important. Both finance teams should establish processes and methods for communicating their work to the congregation.

Goal #6 – Continue improving stewardship of our assets.

We have recently made good progress in funding a capital replacement fund and establishing long range planning for our building. We are set to pave our parking lot! We have completed a list of needed building maintenance. We have also reconfigured our paid staff and made their jobs more satisfying through teamwork and collaboration. We have

many deeply committed volunteers at UUAA who enjoy the energy they invest. There is more to be done to be even better stewards of both our physical and human resources.

Specific Actions – Stewardship of Staff and Congregants

1. **Rebuild Pastoral Care:** Our “people assets” need particular attention. The heart of any congregation is its pastoral care program and ours has fallen into disarray. It needs a sustainable structure put in place and a re-visioning.
2. **Job Descriptions/ Personnel Manual:** Our staff is still in the process of redefining their roles and we have no specific job descriptions for them. We have not done compensation reviews recently. The Board and Interim Minister should oversee an effort to update and improve our personnel processes and update the Personnel Handbook.
3. **Encourage Gratitude:** During our 150th celebrations it was clear that members, staff, everyone involved benefited from even very small expressions of gratitude for their time and talents. We need to foster this spirit of gratitude and recognition to make sure our staff and volunteers know how much they are valued and to inspire new volunteers as well. Staff and lay leaders should receive training in how to show gratitude.
4. **Improve Communications Between Ministries via Council of Ministries:** Everyone needs to support the new Council of Ministries that was created to address communications between the many ministries of the UUAA congregation. The Council can help coordinate the UUAA calendar, communicate strategic goals to congregants and also give feedback on strategic goals to the Board. In general, we hope the Council can smooth out the volunteer experience.

Specific Actions – Stewardship of building and grounds

1. **Oversight of Building and Grounds Needs:** The Executive Director used to oversee the building and grounds. These responsibilities need to be re-assigned. Some of the items below need to be assigned to the responsible person.
2. **Continued Capital Improvements:** We have a good start on maintenance and repair of our building. We need processes in place and responsibilities assigned to make sure this continues.
3. **Build up the Capital Replacement Reserve Fund:** The new Finance Committee and the Board need to make sure we continue to budget for capital replacements.
4. **Revitalize the “Our Land for Worship” group:** This group planned and carried out projects on UUAA’s land. At present, the group has no leadership and needs attention to reorganize volunteers.
5. **“Operator’s Manual” for the UUAA Building:** Our Interim Administrator has been working on documentation of the many specifics for our building – HVAC equipment, roofers, painters, computer networks, etc. Finishing and maintaining this manual will simplify building maintenance as personnel changes and responsibilities are distributed. Someone will need to maintain and expand this Operator’s Manual.

Goal #7- Keep our Spiritual Growth & Development programs strong.

Religious education has always been absolutely central to UUAA's mission all the way back to our founding in 1865. Our youth Spiritual Growth & Development classes have had strong steady attendance, even during 2015-16 when there was no paid SGD director. Our Adult SGD has been slowly growing, but the program struggles for traction and wants to be bigger and better rooted in the community.

Specific Actions

1. **Orient and support the new part time Asst Minister of SGD:** We have a strong youth SGD program. It brings new parents into the congregation, fulfills a core mission to develop SGD alumni who are very socially active and provides influence over our community and our culture. Some of the strengths are a strong curriculum, the powerful Coming of Age Sunday service, and the dedicated volunteer staff. Our lay leadership has done a good job of maintaining the SGD programs without a director of Religious Education, but the programs are in need of better coordination and the lay leaders are in danger of burnout. We need to make sure our new Asst Minister of SGD is well introduced to our staff and SGD programs. This will relieve the current SGD leadership from mundane logistical tasks and free them to focus more on growing and integrating the programs.
2. **Budget for a full time Asst Minister of SGD:** In the past the RE Director (as it was called then) was a full time position, reflecting the importance of this part of our congregation's mission. By 2020 we should make sure to budget for and employ a full time Minister of SGD.
3. **Integrate SGD programs into the life of the congregation:** The work of the youth SGD programs should be more integrated with the life of the congregation as a whole. Rev. Gail once said that there are two distinct groups on Sunday – those that enter through the main door and those that enter through the classroom wing. In addition to the Coming of Age service, finding ways to include teachers and children in other services by getting grades 6-12 more involved in worship, sharing with the congregation what is being taught in SGD, and having youth-oriented events open to everyone would help bring the two wings closer together.
4. **Promote Adult SGD:** The Adult SGD is currently rebuilding. This is an important program that deepens our spirituality, helps with different stages of our life journey, builds community, and provides tools to influence our community and the world around us. The program needs advertising - perhaps prominence on our web site and/or a presentation during a Sunday service. There is a dedicated motivated leadership group in place working hard towards re-introducing a Friday family night that includes an emphasis on adult SGD classes. In addition to requesting promotion, there is a need for more facilitators and additional curriculums to increase involvement. This should be high on the list of needs for the new Asst. Minister of SGD to address.

Goal #8- Keep our Social Justice programs strong.

Our Social Justice programs are lifeblood to our very justice conscious congregation. Part of our work as a congregation is to empower people to find fulfillment for themselves through helping repair the world with UU value driven projects. We are unlikely to have a Social Justice Minister in our near future, so our volunteer led Social Justice Council has been a wonderful addition, allowing the many Social Justice groups a forum to communicate and coordinate. We need to make sure the Social Justice Council structure is sound and has the resources to nurture and support our programs. And we need to show them gratitude for the work they make possible.

Specific Actions

1. **Support Social Justice Council Strategic Planning:** This is a new effort for the SJC and should be encouraged and integrated into the Boards strategic planning processes.
2. **Provide financial support for Social Justice projects:** As budget allows, we have been increasing financial support for social justice projects. Continued increased financial support should be a priority.
3. **Recognition/ Appreciation/ Communication:** Further develop the Social Justice Moments that have just started as a part of Sunday services. These presentations spotlight our outreach projects and let the whole congregation, even those who are not a part of the project, feel proud of our UUAA accomplishments. We need to find other ways to spotlight and appreciate our social justice commitments.

Conclusion

Over the next few years UUAA will try to conduct a smooth and even exciting and joyful ministerial transition. We begin with the Board hiring an Interim Senior Minister who can work in collaboration with us to continue meaningful worship services and strengthen our many existing high energy programs while we work on reconfiguring our governance, better defining staff roles and rebuilding our very essential pastoral care program.

We will strengthen our sense pride in our community and also re-define our community to include an on-line ministry. We will try to include in our ministries UUs in our MidAmerica Region and beyond. We will continue to improve our stewardship of our building and grounds. We will have sound oversight of finances. The Board will better monitor the health of the programs of the congregation and will focus more on strategic planning with better input from staff and from lay leaders. We will celebrate ourselves more and show more gratitude. We will move a bit further down our road to the future, discovering new potholes but also experiencing the unimagined beauty.

Submitted by the 2015-2016 Board of Trustees Strategic Planning Task Force

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Appendix A -- Summary of Recommended Actions

Goal #1 – To carry out a graceful, positive, energized ministerial transition

1. All-congregation excellent farewell to Gail and Celeste
2. Hire, welcome and support an Interim Senior Minister
3. Carry out Senior Minister search.
4. Welcome, install, orient and work with new Senior Minister
5. Communicate -- set up a web page etc., for 2+ years of transition information
6. Encourage all-congregation activities to build community
7. Spotlight congregational achievements

Goal #2 – To clarify the governance of UUAA; to update the specifics of the Senior Minister’s role as Executive prior to calling a new minister.

1. Blue Ribbon committee to advise us on how to revise our Policy Governance
2. Revise Board of Trustees Monitoring Schedule
3. Communicate an easy to understand Guide to UUAA Governance

Goal #3 – To promote and expand UUAA music ministries.

1. Geisenhainer Music Fund- establish committee and goals
2. Provide Resources
3. Provide Equipment, especially procure an identified Steinway piano.

Goal #4 – To Market Our UUAA Congregation

1. Communications Task Force
2. Establish Communications Media and Text Libraries

Goal #5 – To improve oversight and development of fund raising and financial processes.

1. UUAA Finance Team development
2. UUAA Fund Raising Team development
3. Board Evaluation of Finance Teams / make standing committees if seems best
4. Move to Fair Share Giving
5. Communicate finances to congregation

Goal #6 – Continue improving stewardship of our assets.

1. Rebuild Pastoral Care programs
2. Job Descriptions/ Updated Personnel Manual
3. Gratitude whenever, wherever possible
4. Improve Communications Between Ministries via Council of Ministries
5. Oversight of Building and Grounds Needs
6. Continued Capital Improvements
7. Build up the Capital Replacement Reserve Fund
8. Revitalize the “Our Land for Worship” group
9. “Operator’s Manual” for the UUAA Building

Goal #7- Keep our SGD programs strong.

1. Orient and support the new Asst Minister for SGD
2. Budget for and employ a full time Asst Minister for SGD
3. Integrate SGD programs into the life of the congregation
4. Promote Adult SGD

Goal #8- Keep our Social Justice programs strong.

1. Support Social Justice Council Strategic Planning
2. Provide financial support for Social Justice projects
3. Recognition/ Appreciation/ Communication of Social Justice projects.

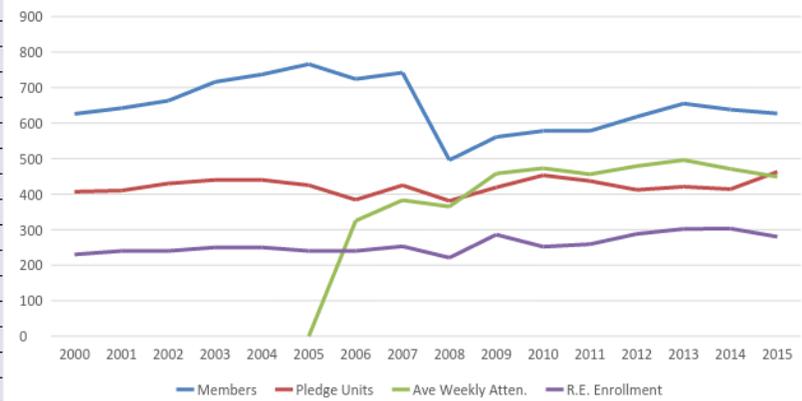
Appendix B – Snapshot of some measures of where UUAA is today (May, 2016)

Membership

First Unitarian Universalist Congregation of Ann Arbor: Membership Numbers 2000 to 2015

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Members	626	642	663	716	737	766	724	742	496	561	578	578	618	655	638	627
Pledge Units	407	410	430	440	440	425	384	425	381	419	453	437	412	421	414	463
Ave Weekly Atten.							325	383	365	458	473	456	479	496	471	449
R.E. Enrollment	230	240	240	250	250	240	240	253	221	286	252	259	288	302	303	280

UUAA Membership/Attendance



Summary Financial Status

UUAA Financial Status for 2012-2014

Year	Income Total	Expense Total	Pledge + Collection Income	Other Income	Prog Expense	Stewardship Expense	Employee Expense
2012	1,007,111	998,949	896,538	110,573	30,256	350,701	617,992
2013	1,095,511	1,037,270	961,463	134,048	34,781	362,428	640,061
2014	1,028,194	1,045,865	927,417	100,777	58,688	310,097	677,080
2015*	1,033,995	1,014,228	943,008	87,987	66,884	363,579	583,764

*estimated – need final numbers

Facebook Participation – sample 28 day period mid-April to mid-May 2016

The people who have liked, commented on, or shared your posts or engaged with your Page in the past 28 days.

