

# STRATEGIC PLAN

May 2020



*Unitarian Universalist  
Congregation at Montclair*

# Contents

- Executive Summary..... 1
- Introduction ..... 3
- Background & History ..... 4
- Strategic Planning Process ..... 6
- Creating New Mission and Vision Statements..... 8
- Goals, Objectives, and Actions: Bringing Strategic Plan Intentions to Life ..... 11
- Implementation ..... 12
- Ministry Areas Goal Statements ..... 13
- UUCM Goals and Objective..... 17
- Care and Connection..... 18
- Family Ministry..... 18
- Governance..... 19
- Service and Justice ..... 19
- Stewardship ..... 21
- Welcome and Engagement..... 22
- Worship and Celebration ..... 23
- Appendix A – Care and Connection Actions ..... 24
- Appendix B – Family Ministry Activities..... 26
- Appendix C – Governance Activities ..... 28
- Appendix D – Service and Justice Activities ..... 30
- Appendix E – Stewardship Activities..... 33
- Appendix F – Welcome and Engagement ..... 37
- Appendix G – Worship and Celebration Actions..... 40
- Acknowledgements..... 42

## Executive Summary

In August 2018, the Board of Trustees at the Unitarian Universalist Congregation at Montclair (UUCM) voted to initiate the process of developing, and subsequently implementing, a Strategic Plan for the period beginning July 2020 through June 2024. The UUCM Strategic Plan Task Force (SPTF) was established to lead the strategic planning process.

The Strategic Plan aims to affirm UUCM's identity and provides the congregation with priorities for the future and pathways to achieve those priorities. It is a forward-looking document collaboratively created to foster mindful action, provide structure for our programs, and set priorities for the budgeting process, staffing decisions, technology acquisition, and facilities improvements.

The Strategic Plan is comprised of 3 key components:

1. A Congregational Mission Statement
2. The Congregational Vision Statement
3. UUCM's Goals & Objectives

The Strategic Plan is intended to function as a playbook to help the Board, Staff, Council on Ministries, and Congregation at large achieve the congregational Mission and live into the congregational Vision. The Goals & Objectives section of this plan, beginning on page 18, was created to establish priorities for strategic action within the 4-year plan implementation period. These Goals & Objectives are organized according to the seven Ministry Areas, also known as the congregational pillars of UUCM congregational life.

- Care and Connection
- Family Ministries
- Governance
- Worship and Celebration
- Service and Justice
- Stewardship
- Welcome and Engagement

The SPTF drove the Strategic Planning process, with Matt Silverman, Laura Wilson, and Nancy Franklin, leading the way. In addition, the Council on Ministries and Board of Trustees worked in tandem with the SPTF to move the Strategic Planning process forward.

**Strategic Plan Task Force Expanded Team**

	Care & Connection	Family Ministry	Governance	Service & Justice	Stewardship	Welcome & Engagement	Worship & Celebration
<b>Goals and Actions Team</b>	Abby Kessler	Larissa Brookes	Laura Wilson	Nick Lewis	Dennis Kurti	Dottie Hiebing	Dan Silver
<b>Board Liaison</b>	Elaine Gibson	Peter Arian	Susan Raufer	Brian Crooks	Chris Corbett	Lauren Carlton	Michael Hetrick
<b>Council on Ministries</b>	Nina Cooke John	John Wodnick		Sarah Scalet	Dan Silver	Hal Strelnick	David Lewis

**Note:** In addition to relying on the expertise and talents of the congregation, UUCM hired a Consultant, Mark Bernstein, to provide additional guidance.

The content documented in the UUCM Strategic Plan represents many hours of work, contributed over a period of 31 months. The Strategic Planning process was designed to be highly collaborative, very inclusive, forward-looking, and structured around a timeline that included a series of meetings and interactive opportunities. As UUCM moves through the next four years as a congregation, the Strategic Plan will serve as a roadmap to bring the congregation’s most cherished values and intentions to fruition.

# Introduction

On August 28, 2018, the Unitarian Universalist Congregation at Montclair (UUCM) Board of Trustees issued the Official Charge of the Strategic Planning Task Force (SPTF). This charge defined the Strategic Plan’s purpose and focus of the Task Force:

The purpose of the Strategic Planning Task Force is to:

- Develop and Facilitate a process to determine the future of the Unitarian Universalist Congregation at Montclair.
- Present a Strategic Plan to the Congregation which includes - a congregational Mission, a congregational Vision, and goals and action steps for each of the six ministry areas and governance.

The Strategic Planning Task Force envisions:

- An inspirational and memorable Mission for UUCM that conveys a powerful message with clarity.
- An inspirational and meaningful and Vision for UUCM that conveys our aspirations in language that encourages real and specific action.
- A Strategic Planning process that involves the whole of the congregation in ways that encourage ownership of the Strategic Plan.
- An unambiguous Strategic Plan that will enable the Board, Staff, and Council on Ministries to achieve the congregational Mission and seek the congregational Vision by following the action steps.

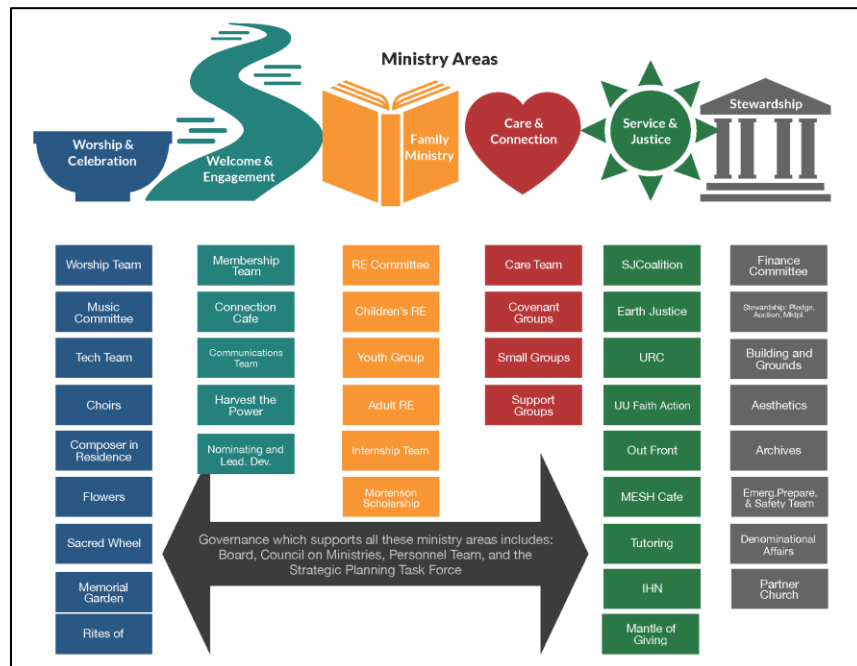


Figure 1: The 7 UUCM Ministry Areas

## Background & History

The Unity Church of Montclair, which became the Unitarian Universalist Congregation at Montclair, was officially established on October 6, 1897, when 34 people gathered to hear a reading of the newly created Constitution and By-laws.

On September 20, 1898, the congregants installed Reverend Arthur Hastings Grant as the first settled minister of UUCM.

The UUCM building, located at 67 Church Street in Montclair, NJ, was dedicated in 1905. Since that time, the congregation has grown to more than 400 people; faced and overcome numerous challenges, including a fire in 1919 that gutted the sanctuary; provided lectures and other intellectual opportunities to the community at large; lost members in combat on the front lines of international wars; and been led by a total of nine settled ministers, including the current Senior Co-Ministers, Anya Sammler-Michael and Scott Sammler-Michael.

True to its early mission to create a “liberal church” and to provide a liberal religious education for their children, UUCM welcomed liberal thought-leaders and luminaries of the early 20<sup>th</sup> century to lecture on topics, such as race relations, immigration, birth control, food sanitation concerns, and labor movements. These lectures were open to anyone who wanted to attend. For example, between 1910 and 1923, W.E.B. Dubois, PhD; Booker T. Washington; Jacob Riis; Bertrand Russell; and the President of the National American Women’s Suffrage Association, Reverend Anna Howard Shaw, came to speak and engage with the congregation and the larger community.

The congregation’s commitment to liberal education and universal social justice has not waned. Just as those who gathered in 1897 were seeking to improve themselves as individuals, help one another, and make the world a better place, today’s UUCM congregants continue in that tradition, more than a century later.

- 1. The inherent worth and dignity of every person**
- 2. Justice, equity, and compassion in human relations**
- 3. Acceptance of one another and encouragement to spiritual growth in our congregations**
- 4. A free and responsible search for truth and meaning**
- 5. The right of conscience and the use of the democratic process within our congregations and in society at large**
- 6. The goal of world community with peace, liberty, and justice for all**
- 7. Respect for the interdependent web of all existence of which we are a**

*Figure 2: The 7 Principles of Unitarian Universalism*

In June 2016, the UUCM embarked on a search for a new Minister as the end of the Interim Minister's tenure neared. During this time, the congregation had a unique opportunity to reflect on its identity and aspirations for the future of UUCM as a faith-based institution in the 21<sup>st</sup> century. The institution's identity is grounded in the seven principles of Unitarian Universalism (see Figure 2).

As part of that reflecting process, a survey was fielded to the congregation, which asked congregants to consider the following: "Why are we here?" Top responses focused on community, spiritual growth, fellowship, religious education, intellectual stimulation, and commitment to the Seven Principles of Unitarian Universalism (Figure 2). This process of soul-searching set the foundation for next steps, which eventually led to the Board's decision to move forward with the Strategic Plan.

The purpose of creating the UUCM Strategic Plan was to develop and facilitate a process to help the congregation align its activities with its values and aspirations, while achieving its short- and long-term goals. The Strategic Plan includes a Mission statement, a Vision statement, and a Goals & Actions section which includes an overarching goal, specific objectives, and correlative actions for each of the seven ministry areas (Figure 1).



*"Since Rev. Scott and I had our first meetings with leaders, months before we officially began our calling, we heard articulated, clearly and resolutely, that strategy, focus, and deliberate action were in order, should UUCM be able to achieve the goals its members held for their beloved community."*

**Reverend Anya Sammler-Michael**

After an intensive search process, the new Co-Ministers, Reverend Anya Sammler-Michael and Reverend Scott Sammler-Michael, were installed in April 2019, after being called to lead the congregation starting in August 2017. With the new Co-Ministers at the helm, and a charge from the Board of Trustees, the Strategic Planning Task Force (SPTF) formally initiated the Strategic Planning process, starting with a kickoff Town Hall Meeting in October 2018. Though all went well with the planning process, in March 2020, the COVID-19 pandemic forced UUCM to temporarily pivot to all-virtual operations, worship services, and interactions of any kind. Despite challenges and hardships in the community, the strategic plan approval process went forward in an online setting.

## Strategic Planning Process

From beginning to end, the Strategic Planning process took 31 months, and if that process could only be described with one word, that word would be “collaborative.”



*“I could not have fathomed that we would begin launching our Strategic Plan while grappling with a historic pandemic. During the strategic planning process, one of the things we were asked to do was imagine our Congregation if money was not an issue. I remember describing a vision of UUCM having a lot more “virtual” worship and other ministry in order to build a wider community. I never thought it would happen so soon.”*

**Peter Arian, UUCM Board, Trustee-at-Large**

The SPTF envisioned a planning process that would involve “the whole of the congregation in ways that encourage ownership of the Strategic Plan.”

The kickoff Town Hall meeting, on October 28, 2018, was well publicized, setting the tone for the entire process. The SPTF used multiple methods to communicate with the congregation throughout the process, including town hall meetings, interactive workshops, written and email input from members and informal conversations.

Even before the first Town Hall Meeting, hard-copy bulletins placed around the building and e-blasts exhorted congregants to ruminate on the question: “*Who are we as a congregation---and where are we going?*”

When the SPTF introduced the congregation to the concept of the Strategic Plan at the first Town Hall meeting on October 28, 2018, Laura Wilson and Matt Silverman provided everyone with markers, post-its, and flipcharts, representing each of the seven ministry areas (Figure 1). Attendees were given free rein to write down their hopes for anything they wanted to address within the seven respective ministries.

The first Town Hall meeting was an all-out success that garnered responses from more than 35 attendees. The congregation’s ‘wish list’ was long. People wrote that they wanted more social justice outreach, more protests, a facilities overhaul, more interfaith alliances, improved finances, more worship time, and a focus on growing the congregation, particularly with younger families.





*“The Strategic Plan has been a priority for the Board of Trustees for my entire tenure as President. It is particularly gratifying to see it come to fruition through a process that was so inclusive of a broad spectrum of the congregation.”*

**Sue Raufer, UUCM Board of Trustees, President**

As the process continued and the Strategic Plan evolved, the Goals and Actions Team continually sought more input from more congregants, while also working and reworking content in order to address concerns or disputes about specific parts of the plan. In addition, at key junctures, the congregation voted on the Mission statement and the Vision statement, which together served as a foundation for the individual Goals and Objectives associated with the seven ministry areas.

A commitment to disciplined implementation of the Strategic Plan was made by the Governance ministry. As such, UUCM has formally committed to “live into its mission and vision by ensuring a strong organizational infrastructure, implementing the Strategic Plan, and developing tools and processes to monitor the effectiveness of the congregational ministries.”

**Figure 3: Chronology of Major Events**

August 2018	Board votes to initiate Strategic Planning Process
October 2018	1 <sup>st</sup> Town Hall - Strategic Planning Introduction
May 2019	2 <sup>nd</sup> Town Hall – Mission Statement and Goals Workshop
May 2019	Vision Workshop
June 2019	Congregation votes to approve new UUCM Mission Statement
September 2019	3 <sup>rd</sup> Town Hall – Vision Statement
October 2019	Congregation votes to approve new UUCM Vision Statement
March 2020	4 <sup>th</sup> Town Hall – Ministry Area Goal/Objective review



**Christopher Corbett,  
Board Liaison**

*“I’ve been involved in strategic planning at other organizations and usually the plan is mostly created by leadership with little input from members. They also tend to be very general in nature with no specific actions and timelines created. Because of this, the plans usually end up in a drawer somewhere and never implemented. This plan is different - it truly springs from the Congregation’s grassroots with ideas coming from all. It is also specific as to goals and objectives and timing. It’s a true blueprint for our future!”*



*“There was a sense of purpose as 30 or more people worked in small groups, focusing on the areas of ministry to which they were committed.”*

**Laura Wilson, SPTF Lead, Governance  
Comments on the 2<sup>nd</sup> Town Hall Meeting,  
May 2019**

## Creating New Mission and Vision Statements

Prior to kickoff, UUCM had a mission statement for many years; however, when the Strategic Planning process started, it was already decades old and in need of a refresh. The Mission statement was informed by the extended period of self-reflection that the congregation undertook starting in 2015. Using that as a foundation, work on formalizing and finalizing a revised Mission statement for UUCM concluded in June 2019.

### UUCM Previous Mission Statement

*“Seeking transformation in our hearts, our homes, our community, and the world.”*

The new Mission was created with the goal of defining our identity, specifically who we are as a congregation. From the start, the goal was to create an inspirational and meaningful Mission statement that conveys a powerful message with clarity and brevity. This Mission statement defines who we are, why we exist now, and how we are called to be with one another---our covenant.

Under the direction of SPTF lead, Laura Wilson, a Mission and Vision team, including Nicole Gray, Jason Luther, Melissa Mintz, and Jon Wodnick, took on the task of drafting copy for the Mission and Vision statements.

### **UUCM New Mission Statement**

*“Grounded in faith, we come together to nurture the soul, inspire hope and bring into being a more just and loving world.”*

The Mission and Vision statements are the foundation for the Strategic Plan. Together, these statements define who we are now and what we want to become in the future. These statements provide the framework for the Strategic Plan’s Goals, Objectives, and Actions.

In contrast, the Vision statement---something completely new for UUCM---is a statement of long-term transformation resulting from our congregation’s ministries. It is intentionally inspirational and aspirational, but it is also achievable.

### **UUCM Vision Statement**

*We envision a growing, courageous, diverse, and inclusive faith-based community, dedicated to creating a sacred space for lifelong spiritual and intellectual growth. We commit to building and sustaining a loving and safe congregational community for ourselves and generations to come.*

*Our congregation promotes personal and mutual development—now and for future generations.*

*With generous financial stewardship we will care for our facilities and staff and ensure a welcoming space for visitors and members.*

*We will engage with the wider community and honor our long-standing commitment to social justice with strategic action and intersectional collaboration.*

One of the most important parts of the process of creating the Mission and Vision statements was understanding the role they would play in setting the stage for defining objectives and goals. Also, there was the issue of understanding the difference between a Mission statement and a Vision statement. While the Mission statement is intentionally brief and focused in the “now,” the Vision statement speaks to longer-term goals, with a longer time horizon. It is creative, compelling, and inspirational, but still reality-based and amenable to implementation in the real world.

Work on the Vision statement took five months of concentrated effort and intensive collaboration. It was an arduous process that included many rounds of revisions, integration of new ideas, and disposal of ideas deemed unusable. According to the UUCM Co-Minister Reverend Anya Sammler-Michael, “The Vision statement is a roadmap on how to move towards the vision we have for ourselves as a congregation.”

In addition, according to Dan Silver, who played a significant role working with the congregation and the ministries, the Vision statement became “the guardrails” for the SPTF, so that if they did not want to include something in the plan, because it did not seem to serve the vision statement, that was acceptable, and if they did include it, they checked in to see how it fit in the Vision statement.



**Dan Silver, G&A  
Team member &  
Council on Ministries  
Representative**

*"The work toward this Vision statement was perhaps the most protracted but, from my standpoint, the most meaningful process I have yet witnessed our community engage. The multi-layered steps that led to the statement could not have been predicted from the outset, but they were exactly what was required. In moments it felt like all the hard work done by one group or team would be dissolved by a well pointed critique of another, but in the end every criticism and every offering were woven into the fabric of our Vision. What we have is a statement that will lead us forward, together."*

*"For me the magical moment was between the first review of the Vision statement and the second version. I've not been part of a process where both the criticism made mostly sense AND the writing crew got it all and made everything change for the better. It was actually moving for me to see it all come together. So rare."*

## Goals, Objectives, and Actions: Bringing Strategic Plan Intentions to Life

A Goals and Actions (G&A) Team began meeting regularly following the congregational approval of the vision statement. The focus of this group was to establish goals and build the associated objectives needed to address the goals. The G&A Team was led by Matt Silverman and Nancy Franklin and was composed of seven individuals who each took responsibility for one of the ministry areas. Each individual worked with the lay leaders of all the committees, teams, and groups associated with their ministry area.

Under the guidance of G&A team members, Board liaisons, and Council of Ministry (CoM) liaisons, each of the ministry area teams developed one goal and as many objectives as needed, based on consensus, to achieve the target goal. Objectives were developed using a SMART format: **S**pecific, **M**easurable, **A**ttainable, **R**elevant, and **T**ime-Bound. Overall, there are seven core goals and a total of 85 objectives (Figure 4). As the SMART objectives were developed, numerous tactical actions were proposed to address many of the objectives. While these suggested actions are included in the plan as a starting point for lay leaders to consider how best to accomplish objectives, they are not meant to be all-inclusive or compulsory. The SPTF recognizes that contexts may shift over the course of the plan’s four years, requiring flexibility and agile “doing.”

	Goals	Objectives
<b>Care and Connection</b>	1	11
<b>Family Ministries</b>	1	3
<b>Governance</b>	1	6
<b>Justice and Service</b>	1	20
<b>Stewardship</b>	1	18
<b>Welcome and Engagement</b>	1	19
<b>Worship and Celebration</b>	1	8
<b>TOTAL</b>	<b>7</b>	<b>85</b>

*Figure 4: Goals & Objectives Breakdown*

The G&A Team began meeting monthly in late 2018. By mid-Fall, draft goal statements for each ministry area were developed. G&A team members and their Board and CoM partners continued to communicate with each of the committees, teams, and groups associated with

their respective ministry areas to develop objectives and refine goals. Meanwhile, members of the congregation were kept apprised of the process through newsletters, Connection Café, and information located in the narthex and invited to contribute. By the end of 2019, a full set of goals and objectives was drafted. The draft goals and objectives were shared with the Board in January. Board feedback was incorporated subsequently and a Town Hall meeting open to the congregation was held in early March 2020 to share the draft content and solicit input.

Successful achievement of the Goals & Objectives presented in this Strategic Plan will require all members of UUCM to hold each other mutually accountable for carrying out the strategies.

## Implementation

The UUCM Board of Trustees will oversee the implementation of the Strategic Plan. Each year the Board will review the plan and determine which objectives should be prioritized in the upcoming year, based on urgency, resource requirements and availability, and the congregation's strategic interests. The Board will also establish assessment and reporting processes to ensure a continued focus on UUCM's strategic priorities, a means of measuring progress toward achieving the plan's objectives, and the provision of consistent and transparent reporting of progress to the congregation's constituents.

Lay leaders across all seven ministry areas will be educated about the overall composition of the Strategic Plan and will become familiar with the component parts. They will be provided with guidance about how to align their activities with the plan as well as how to report on progress. Each lay leader will review the goals, objectives, and suggested actions associated with his/her/their area of work and will learn from the Board the annual priorities that have been established.

The Board will appoint a Strategic Plan Implementation Team to manage the plan's rollout and reporting. This team will be responsible for establishing regular communication with lay leaders, assisting lay leaders with responding to implementation questions that arise, gathering information from lay leaders about implementation progress, and reporting progress to the Board. The Board may ask the Implementation Team to prepare annual progress reports – both written and oral - for the congregation at large.

## Ministry Areas Goal Statements

Following are the goal statements associated with each of the seven ministry areas. The following section of the plan details the objectives associated with each of the goals and is supplemented by the many suggested activities included in the appendices.

### Care and Connection

**GOAL STATEMENT:** Strengthen our congregation's commitment to know and care for one another and foster fellowship and community, by providing opportunities to develop strong personal bonds.

### Family Ministries

**GOAL STATEMENT:** Provide Unitarian Universalist religious education that incorporates social justice, ecological practices, congregational stewardship, and other UUCM values, for people of all ages, regardless of UUCM membership.



*“Deciding on the goal and objectives for Family Ministries was daunting but at times exciting. It’s so hard to narrow down the universe of possibilities to a few solid objectives; it’s very easy to focus on the things you didn’t choose. But once the work is done, it is liberating to set aside the other ideas and distractions, so we can make our objectives happen.”*

**Larissa Brookes, G&A Team Lead, Family Ministries**

### Governance

**GOAL STATEMENT:** UUCM will live into its Mission and Vision by ensuring a strong organizational infrastructure, implementing the Strategic Plan, and developing tools and processes to monitor the effectiveness of the congregational ministries.

### Service and Justice

**GOAL STATEMENT:** Provide opportunities for UUCM members to engage in meaningful activities, either through social justice work coordinated by the Social Justice Coalition and its member committees, or through the service opportunities provided through the service committees (such as Montclair MESH Café), and in so doing strengthen the impact of our ministry within and beyond our congregation. Provide a place for members, friends, and supporters of UUCM to fulfill the outreach inherent in our Mission statement to collectively act

on our shared UU principles to implement initiatives that further work to bring an end to systemic inequalities within UUCM, locally and globally,.

### **Stewardship**

**GOAL STATEMENT:** Ensure the Congregation has financial resources that are stable, secure, and sufficient to support the Mission and Vision of the Congregation; create and sustain a culture of generosity in which congregants are well-informed about the finances of the organization, are comfortable talking about money, participate actively and joyfully in annual budget drives and capital campaigns, and can articulate the linkage between the congregation's mission and resources; through adequate funding, ensure that, with repair, replacement and improvements, our historic facility meets all Congregational needs, is pleasant, inspiring, and safe, today and for future generations; and conserve, preserve and protect all historical elements of the UUCM.

### **Welcome and Engagement**

**GOAL STATEMENT:** Strengthen UUCM's commitment to be welcoming to all and to create a diverse and growing congregation through expanded outreach and communication strategies; welcome new individuals and families into UUCM with actions that are specific and tangible; sustain and nourish all members and visitors; and continuously develop new leadership.



*"I think a difficult part of the process was explaining what the strategic plan is and the difference between goals and objectives to the chairs of the committees. They are all smart so they "got it" right away though."*

***Dottie Hiebing, G&A Team Lead, Welcome and Engagement***

### **Worship and Celebration**

**GOAL STATEMENT:** Foster a welcoming, accessible, and inspiring worship experience, on Sundays and beyond, that serves the ends of personal and spiritual growth by ensuring that the necessary resources are available for our staff and lay leaders to meet this goal.



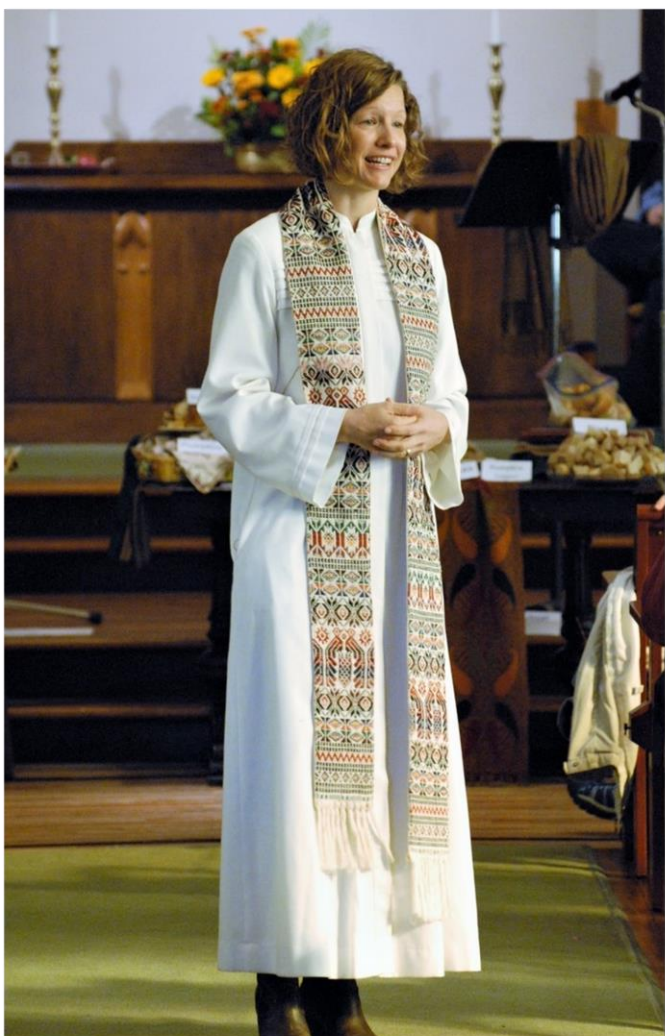


**Nina Cooke John, Council of Ministries Liaison, Care and Connection**

*“The role of the Council on Ministries is to make sure that the different ministries of the congregation are all fulfilling the larger mission of the church. We regularly check-in with the different committees and ministries to see how they think their engagement with our community is aligned with the core values of our entire congregation. So, it was an easy integration of the Council on Ministries into the Strategic Planning process.”*

*“One member of the strategic planning committee, a member of the Board and a Council on Ministries member formed teams of 3, each associated with the different pillars of ministry. We each worked with the different groups helping them to clarify their goals and develop clear steps for the future.”*

*“Each team member brought a different perspective depending on which committee we represented; the Board members understood the larger workings of the congregation, the CoM members understood how the ministry groups live into a mission and the members of the Strategic Planning Committee understood the larger vision of where the congregation wanted to go.”*



*"I know how difficult the work is, to develop as fine a strategic plan as this one. The leaders of this effort have given greatly to see this plan succeed. They deserve the praise and gratitude, not just of this generation, but of all the generations to come, as their work will support our congregation's development for far longer than the three to five years that the plan is set to last."*

**Reverend Anya  
Sammler-Michael**

# **UUCM STRATEGIC PLAN**

## **GOALS AND OBJECTIVES**

## Care and Connection

### Goal Statement:

Strengthen our congregation's commitment to know and care for one another, and foster fellowship and community, by providing opportunities to develop strong personal bonds.

### Objectives:

1. Devise and implement a more effective outreach effort to identify those needing care and those who have received care. (Care Team)
2. Establish lay-led pastoral care. (Care Team Ministry)
3. Increase number of participants in current open groups. (Covenant Groups)
4. Add two new Soul Matters groups, including one that meets during the day. (Covenant Groups)
5. Strengthen the bonds among our Cakes group members. (Cakes for the Queen of Heaven)
6. Provide a safe space for those experiencing a significant loss and the resulting sense of loneliness that often accompanies it. (Grief Support Group)
7. Expand and enrich the bonds between members and friends of UUCM who identify as women through a variety of social experiences (Women's Group)
8. Congregational outreach: foster connection with other groups and increase younger membership. (Men's Group)
9. Community Connection: foster connection with men from groups at other religious congregations. (Men's Group)
10. Community Service: do works in the local community (Essex Co area). (Men's Group)
11. Increase awareness and participation in quilting. (Crazy QUilters)

## Family Ministry

### Goal Statement:

Provide Unitarian Universalist religious education that incorporates social justice, ecological practices, congregational stewardship, and other UUCM values, for people of all ages, regardless of UUCM membership.

### Objectives:

1. Ensure the RE program welcomes and engages all people interested in participating.
2. Ensure the RE program has paid and volunteer staff needed for meeting objectives
3. Incorporate UUCM efforts, such as MESH, Undoing Racism, building maintenance, worship, and other initiatives, into RE activities.

## Governance

### Goal Statement:

UUCM will live into its mission and vision by ensuring a strong organizational infrastructure, implementing the Strategic Plan, and developing tools and processes to monitor the effectiveness of the congregational ministries.

### Objectives:

1. Oversee implementation of the Strategic Plan (Board of Trustees)
2. Conduct a comprehensive review of the Society's By-Laws and recommend revisions to align with UUA guidelines for By-Laws development and support the execution of the strategic plan (Board of Trustees)
3. Determine appropriate staffing structure that supports implementation of the strategic plan. (Board of Trustees)
4. Extend and enhance the culture of leadership for lay leaders (Executive Committee, Trustees at Large, and committee/team leaders) to allow for consistent leadership development activities as individuals in all positions change over time. (Board of Trustees)
5. Evaluate Ministerial Staff. (Council on Ministries)
6. Evaluate Congregational Life. (Council on Ministries in consultation with the Board of Trustees)

## Service and Justice

### Goal Statement:

Provide opportunities for UUCM members to engage in meaningful activities, either through social justice work coordinated by the Social Justice Coalition and its member committees, or through the service opportunities provided through the service committees (such as MESH Café), and in so doing strengthen the impact of our Ministry within and beyond our congregation.

Provide a place for members, friends, and supporters of UUCM to fulfill the outreach inherent in our Mission statement to collectively act on our shared UU principles to implement initiatives that further work to bring an end to systemic inequalities within UUCM, locally and globally,.

### Objectives:

1. Commit to focusing the social justice work in the Congregation around the Social Justice Coalition's annual platform/s, as voted on by the members of the congregation.
2. Break down silos by working with other groups within UUCM on common goals. (Social Justice Coalition)
3. Increase UUCM member awareness of and participation in the activities of the member committees of the Service and Justice Ministry. (Social Justice Coalition)

4. Put UU faith in action by strategically building and leveraging UUCM congregational power. (Social Justice Coalition)
5. Collaborate with our interfaith and community partners to increase the political strength of all people seeking love, equity, justice and compassion, and actively affirm and invite such seekers to the UUCM as a welcoming spiritual home. (Social Justice Coalition)
6. Educate congregants on white supremacy. (Undoing Racism)
7. Expand the network of antiracist community organizers in undoing racism trainings. (Undoing Racism)
8. Work to educate the UUCM on the Eighth Principle<sup>1</sup> and to adopt it as a congregation. (Undoing Racism)
9. Increase members' knowledge about the work of UU Faith Action and increase coordination with UUCM and its committees. (UU Faith Action)
10. Increase UUCM's Congregational dues to FaithAction and increase the UUCM individual donor base. (UU Faith Action)
11. Recruit a leader from UUC to serve as liaison, to serve on the UUFA Board or to work on one of its Task Forces. (UU Faith Action)
12. Ensure our volunteers are not overburdened with the responsibilities and tasks of their MESH service work. (MESH)
13. Strive for a consistent balance between the workload and volunteer pool such that there are sufficient volunteers to perform all duties, and that no volunteers are over-burdened (MESH)
14. Ensure our current fund-raising strategies are sound enough to support MESH in a sustainable fashion. (MESH)
15. Help our guests with clothing needs, which many of them express anxiety about as the colder months approach. (MESH)
16. Continue to provide live music, but with the goal of expanding our roster of musicians. (MESH)
17. Continue to strengthen our relationship with the Parent MESH group. (MESH)
18. Deliver gifts to 100% of the children in the Mantle of Giving program before Christmas. (Mantle of Giving)
19. Twice a year provide food and services (children supervision, overnight supervision) to homeless families in Essex County. (Interfaith Hospitality Network)
20. Recruit more tutors to allow the program to tutor more children. (After School Tutoring)

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<sup>1</sup> Provide a place for members, friends, and supporters of UUCM to fulfill the outreach inherent in our Mission statement to collectively act on our shared UU principles to implement initiatives that further work to bring an end to systemic inequalities within UUCM, locally and globally

# Stewardship

## Goal Statement:

Ensure that the Congregation has financial resources that are: stable, secure and sufficient to support the Mission and Vision of the Congregation; create and sustain a culture of generosity in which congregants are well-informed about the finances of the organization, are comfortable talking about money, participate actively and joyfully in annual budget drives and capital campaigns, and can articulate the linkage between the congregation's mission and resources; through adequate funding, ensure that, with repair, replacement and improvements, our historic facility meets all Congregational needs, is pleasant, inspiring, and safe, today and for future generations; and conserve, preserve and protect all historical elements of the UUCM.

## Objectives:

1. Increase funds raised by annual pledge drive and participation rate among members and friends. Increase the culture of stewardship so that generosity is understood as part of our spiritual practice. (Pledge Team)
2. Increase culture of giving. (Pledge Team)
3. Build and maintain a strong pledge team, diverse in backgrounds and identity. (Board of Trustees)
4. Improve pledge processes to support continuity and congregational health. (Pledge Team)
5. Increase attendance and participation to raise income beyond 30K. (Auction Team)
6. Explore Spring Art Auction. (Auction Team)
7. Create an understanding of stewardship through planned giving and spirit of volunteerism by offering both classes and services related to planned giving. (Planned Giving)
8. Increase the assets of the Endowment Fund to \$1.5 million that will insure stable annual income of approximately \$75,000 in the annual budget to be used as general income or applied to a specific area such as social justice, RE and the other pillars of the congregation. (Finance Committee)
9. Increase the Reserve Fund to a total of \$175,000. (The Reserve Fund is intended to secure the Congregation against large unexpected shortfalls in income or large unexpected costs.) (Finance Committee)
10. Raise \$2.5 million dollars for the necessary repairs, replacements and improvements to our facility. (Buildings and Grounds)
11. Increase the balance of our Capital Fund to \$250,000. (Building and Grounds)
12. Raise total annual spending in budget for the facilities to \$75,000. (From current \$30,000). (Buildings and Grounds)
13. Collect, file, and maintain historical files in a manner which helps to preserve them. (UUCM Archives)
14. Increase congregational awareness and involvement. (UUCM Archives)
15. Prepare for emergencies that could impact UUCM including fire, active intruder, medical emergency, and environmental threats. (Emergency Preparedness Safety Team)
16. Improve facility security. (Emergency Preparedness Safety Team)

17. Establish a more collaborative relationship with our Central East Regional representatives to enable us to make better use of the resources available to us. (Denominational Affairs)
18. Achieve full participation at UUA General Assembly and increase awareness of its agenda, both throughout the year preceding it and during the Assembly itself. (Denominational Affairs)

## Welcome and Engagement

### Goal Statement:

Strengthen UUCM's commitment to be welcoming to all and to create a diverse and growing congregation through expanded outreach and communication strategies; welcome new individuals and families into UUCM with actions that are specific and tangible; sustain and nourish all members and visitors; and continuously develop new leadership .

### Objectives:

1. Develop an outreach plan to raise congregational awareness in the local community. (Membership)
2. Develop a concise, repeatable In-reach plan to support new and current members. (Membership)
3. Increase the presence and visibility of the Membership Team with congregational life and activities. (Membership)
4. Grow UUCM membership in size and diversity. (Membership)
5. Ensure UUCM exposure in all media outlets, internal and external. (Communications)
6. Create flyers mainly for internal communication. (Communications)
7. Conduct external advertising. (Communications)
8. Keep UUCM social media and website updated. (Communications)
9. Publish Gazette monthly. (Communications)
10. Overhaul the UUCM website every four years in order to conform to the latest technology and trends. (Communications)
11. Ensure sufficient coverage of Connection Café throughout the congregational year. (Connection Café)
12. Ensure that the dietary needs of Connection Café visitors are met. (Connection Café)
13. Increase the number of visitors to Connection Café. (Connection Café)
14. Improve overall satisfaction with the Connection Cafe. (Connection Café)
15. Increase collaboration between Connection Café and other UUCM groups and committees. (Connection Café)
16. Ensure that greeter service standards are met. (Greeters)
17. Increase participation in Harvest the Power (Harvest the Power)
18. Increase awareness of Harvest the Power amongst newcomers and the congregation at large (Harvest the Power)
19. Increase engagement and stewardship of Harvest the Power graduates. (Harvest the Power)



# Worship and Celebration

## Goal Statement:

Our goal is to foster a welcoming, accessible and inspiring worship experience on Sunday and beyond, that serve the ends of personal and spiritual growth by ensuring that the necessary resources are available for our staff and lay leaders to meet this goal.

## Objectives:

1. Provide a wider variety of music (e.g., classical song instrumental, Latin American, Middle Eastern) and other artistic offerings and align with our monthly themes. These can include incorporating film, dance, drama in a holistic way that will also support faith development and welcome new members into the congregation through a variety of artistic pathways.
2. Redesign narthex areas to make it more inviting, informing, and comfortable.
3. Redesign of balcony areas to make it the hub for all technology and recruit tech volunteer(s) to run visuals and sounds for services and other events. This also includes AV filming capabilities, improved sound, speakers, microphones in the Sanctuary balcony.
4. Foster, through program development and intentional collaboration, a deeper and more deliberate connection between Family Ministries and the Worship and Celebration Ministries.
5. Share the resources currently reserved for Sunday morning worship (such as regular publicity, collaborative worship gatherings, and the music ministries) with groups that offer alternative opportunities for worship and celebration.
6. Enhance the Memorial Garden Space to be a more spiritual place of reverence and memorializing.
7. Hire a part time accompanist/staff person leading to assistant music/arts director as span and scope of music continues to expand in the congregation.
8. Create an internship for music in alliance with Montclair State or another local college.

## Appendix A – Care and Connection Actions

### Objectives and Activities:

1. Devise and implement a more effective outreach effort to identify those needing care and those who have received care. (Care Team)
  - a) Create and maintain a diary of services rendered
  - b) Formalize email procedures among team members
  - c) Create Goals and Objectives for each care team
  - d) Send email to committee/team/group leaders to request referrals
  - e) Follow-up by phone for previous emails
  - f) Provide “phone book” of members and their associated profession (e.g. lawyer)
  
2. Establish lay led pastoral care. (Care Team Ministry)
  - a) Establish pastoral care team of invited individuals
  - b) Provide pastoral care training for team leaders/volunteers
  
3. Increase number of participants in current open groups. (Covenant Groups)
  - a) Determine current number of participants in each group.
  - b) Include a description and contact information of the leader in the Order of Service for one group every week on a rotating basis.
  - c) Contribute a short piece in the Gazette every month.
  
4. Add two new Soul Matters groups, including one that meets during the day. (Covenant Groups)
  - a) Identify potential leaders for two new groups.
  
5. Strengthen the bonds among our Cakes group members. (Cakes for the Queen of Heaven)
  - a) Continue to meet regularly with members taking turns creating and leading sessions
  - b) Plan and attend a weekend retreat together
  - c) Plan and have at least one purely social gathering apart from our more structured meetings
  
6. Provide a safe space for those experiencing a significant loss and the resulting sense of loneliness that often accompanies it. (Grief Support Group)
  - a) Continue to get same level of publicity in e-blasts and orders of service
  
7. Continue to bond women members and friends of UUCM through a variety of social experiences. (Women’s Group)
  - a) Draw newcomers to the group in a different way, as opposed to simply e-blasts and OOS by holding a low-cost auction party to celebrate women
  
8. Congregational outreach: foster connection with other groups and increase younger membership. (Men’s Group)

2020: outreach to: men under 50; People of color (PoC); LGBTQ  
2021: increase membership of under-50/PoC/LGBTQ to 10% (approx. 2 members)  
2022: increase membership of under 50/PoC/LGBTQ to 25% (approx. 4-5 members)  
Specific Tasks:  
2020: 1 joint congregational event or joint service with other group(s) (e.g. speaker/panel or game night)  
2021: repeat joint congregational event or new community volunteer event  
2022: 2 joint congregational events

9. Community Connection: Foster connection with men from groups at other religious congregations. (Men's Group)

2020: Coordination and relationship with one congregation  
2022: Coordination and relationships with 2 congregations  
Specific Tasks:  
2020: Joint meeting with Islamic Center of Passaic Center (ICPC) men, representatives at Iftar  
2021: repeat ICPC, coordinate large attendance at Iftar  
2022: repeat ICPC/Iftar, add joint event with 2nd community group

10. Community Service: do works in the local community (Essex Co area). (Men's Group)

2020 goal: Organize internally  
2021 goal: Coordinate with UUCM group  
2022 goal: Coordinate with UUCM group and external congregation  
Specific Tasks:  
2020: 1 community service event as a group (e.g. Habitat for Humanity/ MESH takeover)  
2021: 1 community service events coordinating with other UUCM group  
2022: 2 community events (possibly combine with Objectives 1 and 2 above) - coordinating with UUCM and community groups

11. Increase the number of active members and congregational awareness. (Crazy Quilters)

a) Invite other crafters to meet with us  
b) Display pictures of quilts made on the bulletin board near Fletcher  
c) Rewrite gazette article with changes monthly  
d) Occasional announcements in Order of Service

## Appendix B – Family Ministry Activities

### Objectives and Activities:

1. Ensure the RE program welcomes and engages all people interested in participating.
  - a) Engage and expand our relationships with local community groups that might find our RE programs relevant, including:
    - i. Working with other congregational groups to design an RE-focused PR/marketing plan targeting Montclair and neighboring towns
    - ii. Publicizing OWL as an essential family resource, through public and private schools, local newspapers, the UUCM website, and other outlets, thereby increasing one of our income streams and awareness of our RE programs
  - b) Hold community-building events such as game nights, meet-ups at the Montclair Art Museum, and similar events that occur at the UUCM or elsewhere. Identify other UU events (such as Undoing Racism programs, Green Sanctuary efforts, MESH supportive activities) that might appeal to RE families and plan how to participate as a group or groups.
  - c) Regularly provide information about current and future RE programs through weekly emails about the RE program in general, UUCM website, regular emails from teacher volunteers summarizing each class, FB pages (UUCM general and UUCM RE), physical postings within UU building, Realm, and any other helpful system.
  - d) Engage regularly with Metro New York/UUA/District youth programs to stay informed about current and future events and to convey this information to Youth District Coordinators.
  - e) Engage with current and recent Senior Youth participants to jointly create an appealing and lasting Senior Youth program.
  - f) Formally establish family support groups for programs such as OWL and Coming of Age.
  - g) Establish a more noticeable presence for the Mortenson Scholarship, adding a page to the UUCM website and specific information about application requirements and past recipients.
  - h) Identify other UU and applicable Lifespan Religious Education programs that may incorporate newer or different ideas and use these programs or part of them in our classes.
  - i) Augment our curricula to implement the use of different learning styles within our existing classes.
2. Ensure the RE program has paid and volunteer staff needed for meeting objectives.
  - a) Incorporate UUA “Staffing for Diversity” practices when recruiting for paid staff positions.
  - b) Formalize the Ministerial Internship program, fixing term lengths and application schedules (e.g., every three years the UU will offer a 12-month internship or whatever the appropriate schedule is), adding the opportunity to the UUA internship board and any other search sites.
  - c) Determine how many paid hours and volunteer hours are needed to support the RE program as it currently exists.
  - d) Plan training, volunteer appreciation events, teacher “check ins” in person or online, and any other tools that inform and reward volunteers.
  - e) Make sure that all lesson plans and supporting materials are available online in easily editable form such as Google Docs and that year-to-year these lessons are preserved and available to future teachers.

- f) Identify an online system that will allow volunteers to easily find and sign up for openings, receive reminders about volunteering and notices about volunteers needed.
  - g) Encourage staff members to attend RE-related professional development events.
  - h) Expand staff and volunteer recruitment to include local colleges.
3. Incorporate UUCM efforts, such as MESH, Undoing Racism, building maintenance, worship, and other initiatives, into RE activities.
- a) Ensure that each RE class (e.g., pre-k, K/1, 2/3, 4/5, 6/7, 8/ COA, and SY) has at least one activity every school year with the following:
    - i. At least one social justice group.
    - ii. MESH
    - iii. Building and grounds maintenance (as with Blue Jean Sunday).
    - iv. Worship Sunday (for example, lighting the chalice or a Tale for All Ages).
    - v. If there is a Ministerial Intern, plan an activity or project with the Intern.
    - vi. The Reverends

## Appendix C – Governance Activities

### Objectives and Activities:

1. The Board of Trustees will oversee implementation of the Strategic Plan.
  - a) Utilize the Strategic Plan for setting annual goals and reporting requirements (staff and ministry areas)
  - b) Educate lay leaders on the Strategic Plan as a whole, and how to align their activities and reporting with the Goals, Objectives, Action Steps, Tasks and Timing related to their ministry areas
  - c) Report on Strategic Plan implementation and progress made at Annual Meeting and in Annual Report
  
2. The Board of Trustees will conduct a comprehensive review of the Society's By-Laws and recommend revisions to align with UUA guidelines for By-Laws development and support the execution of the strategic plan.
  - a) Assign sub-committee of the Board to review and revise the By-Laws
  - b) Review UUA Comprehensive Guide for Writing bylaws and other appropriate resources
  - c) Make recommendations for revisions of bylaws
  - d) Share proposed revisions with congregational leaders and members; encourage dialogue and input
  - e) Share recommended changes with congregation for vote at Annual Meeting in Spring 2021
  - f) (If revisions are extensive, consider breaking into sections and revise over a longer period of time.)
  
3. Determine appropriate staffing structure that supports implementation of the strategic plan. (Board of Trustees)
  - a) After approval of strategic plan, review staffing and potential staffing models that will provide appropriate ministerial, programmatic and administrative staff to align with the mission statement
  - b) Identify key paid and volunteer positions to support the implementation of the strategic plan
  - c) Work with Finance and Personnel Committees to consider budget implications for any changes in staffing model; recommend phased approach to any role transitions/additions
  - d) Share proposed staffing plan, with financial and programmatic implications, with congregation
  - e) Update Employee Handbook to align with new staff positions
  
4. Extend and enhance the culture of leadership for lay leaders (Executive Committee, Trustees at Large, and committee/team leaders) to allow for consistent leadership development activities as individuals in all positions change over time. (Board of Trustees)
  - a) Educate the congregation about the differing functions of governance and ministry.

- b) Continue to formalize the organizational structure by developing resources such as position descriptions, committee and team Charges, reporting mechanisms, ways that the Board can support committees and teams, etc.
  - c) In collaboration with Nominating and Leadership Development Committee and/or Harvest the Power class, develop standardized orientation session for new leaders
  - d) Share the leadership resources with all Board members, committee and team leaders to ensure awareness of mutual responsibilities
  - e) Make leadership resources available to all interested members
5. Evaluate Ministerial Staff. (Council on Ministries in consultation with the Board of Trustees)
- a) Evaluate tools and processes used to evaluate performance of Senior Co-Ministers in 2020; make revisions as needed and utilize moving forward.
6. Evaluate Congregational Life. (Council on Ministries)
- a) Determine the processes and tools for evaluating and reporting on the status of congregational life. These include the ministry areas and the Board of Trustees. The focus should align with the Strategic Plan and the process should be transparent and include opportunities for wide congregational input towards a comprehensive evaluation.
  - b) Educate the congregation on the processes and tools for evaluating congregational life so that the evaluation purpose and process is clear, and participation is high. Goal is to get 80% participation of membership for initial round (completion by Spring 2021)

## Appendix D – Service and Justice Activities

### Objectives and Activities:

1. Commit to focusing the social justice work in the Congregation around the Social Justice Coalition’s annual platform/s, as voted on by the members of the congregation.
  - a) The Social Justice Coalition and its member committees meet and select one or more specific areas of social action focus, which are then submitted to and voted upon by the UUCM members. This area(s) of social justice becomes the focus of UUCM activity during the year. (It is understood that the task may change if it is completed or if an overwhelming intervening issue arises.) The focus may encompass several years, depending on the issue.
2. Break down silos by working with other groups within UUCM on common goals. (Social Justice Coalition)
  - a) Reimagine the structure of our Service and Justice Ministry.
3. Increase UUCM member awareness of and participation in the activities of the member committees of the Service and Justice Ministry. (Social Justice Coalition)
  - a) Ensure that UUCM members (and especially new members) are aware of the service and social action opportunities offered by the Ministry’s constituent committees.
4. Put UU faith in action by strategically building and leveraging UUCM congregational power. (Social Justice Coalition)
  - a) Reimagine Social Justice Sundays
  - b) Provide annual leadership training for at least 20 members each spring during a half day to 1.5-day retreat, depending on the subject matter.
5. Collaborate with our interfaith and community partners to increase the political strength of all people seeking love, equity, justice and compassion, and actively affirm and invite such seekers to the UUCM as a welcoming spiritual home. (Social Justice Coalition)
  - a) Establish 2-3 local interfaith partners on the annual congregational campaign.
6. Educate congregants on the harms of white supremacy. (Undoing Racism)
  - a) Offer White Fragility Book discussion in spring 2020
7. Expand the network of antiracist community organizers in undoing racism trainings. (Undoing Racism)
  - a) Recruit 1-2 congregants to attend People’s Institute for Survival and Beyond Undoing Racism™ Training in 2020
8. Work to educate the UUCM on the Eighth Principle and to adopt it as a congregation. (Undoing Racism)
  - a) Work in the 2020-21 year to educate congregation that we can adopt this Eighth Principle, similar to what UU Church of the Restoration (Philadelphia) has done. The Eighth Principle



commits to “affirm and provide: journeying toward spiritual wholeness by working to build a diverse multicultural beloved community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions.”

9. Increase members’ knowledge about the work of UUFA. (UU Faith Action)
  - a) Make sure that the Congregation is aware of the initiatives that FaithAction is pursuing, the meetings, marches, and seminars it is sponsoring and the other things that it is doing.
10. Increase UUCM’s Congregational dues to UUFA to a minimum of \$15 per member, with a goal of \$20 per member. (UU Faith Action)
  - a) Increase the dues to UUCM to \$15 per member, with the hope of increasing that further (to as much as \$20 per member) over the next 3 years.
11. Recruit a leader to serve on the UUFA Board or as a Leader of one of its Task Forces. (UU Faith Action)
12. Ensure our volunteers are not overburdened with the responsibilities and tasks of their MESH service work. (MESH)
  - a) Reach out to our Bloomfield College liaison and ask her to increase the scope and frequency of BC volunteers. Currently they come 3-4 times per year; aim is for them to come one week per month.
  - b) Reach out to Coming of Age and increase their frequency (TBD) of service.
  - c) Communicate to the congregation the need for more volunteers at least quarterly via Order of Service announcements, e-blasts, etc.
  - d) Sign up and host a Connection Café, frequency TBD after discussions with Connection Café leaders.
13. Get more cooks!!!! (MESH)
  - a) More outreach to the congregation – at least quarterly via Order of Service announcements, e-blasts, etc.
  - b) Finish draft of food amount guidelines and recipes that make it easier/less daunting for cooks to prepare meals. Link to document can be posted every time we post new meal links on Facebook. Can also use Sign-up Genius email blast to distribute documents.
  - c) In-kind donations of food have been helpful in the past. We will increase our outreach to local businesses to see if we can find more of them willing to donate food. This decreases the burden on MESH volunteers to cook.
14. Ensure our current fund-raising strategies are sound enough to support MESH in a sustainable fashion. (MESH)
  - a) Requests on the Sunday Collection should go out to Ministers in time for tweaking the December collection date.
  - b) Check with Shoprite regarding continued donation of gift cards
15. Help our guests with clothing needs, which many of them express anxiety about as the colder months approach. (MESH)
  - a) Communication/outreach to congregation via FB etc.

- b) Community outreach as well (in the past, businesses donated socks, hats, etc.)
- 16. Continue to provide live music, but with the goal of expanding our roster of musicians. (MESH)
  - a) Get more musicians (at least 3-5 additional musicians) to lessen the load on current performers.
- 17. Continue to strengthen our relationship with the Parent MESH group. (MESH)
  - a) Have designated MESH liaison continue to attend parent MESH board meetings and report back to UUCM MESH leader any relevant developments that affect UUCM MESH.
- 18. Deliver gifts to 100% of the children in the Mantle of Giving program before Christmas. (Mantle of Giving)
- 19. Twice a year provide food and services (children supervision, overnight supervision) to homeless families in Essex County. (Interfaith Hospitality Network)
  - a) Make sure that we have a coordinator and volunteers to responsibly fulfill the objective
- 20. Recruit more tutors to allow the program to tutor more children. (After School Tutoring)

## Appendix E – Stewardship Activities

### Objectives and Activities:

1. Increase funds raised by annual pledge drive and participation rate among members and friends. Increase culture of stewardship so that generosity is understood as part of our spiritual practice. (Pledge Team)
  - a) Meet annual goals for pledge drive (vs. current pattern of falling about 5% short).
  - b) Identify congregants who might be able to do leadership giving and make personal appeals to them for pledging, which also sets us up for the future capital campaign.
  - c) Increase # of givers at \$10K and above from 9 to 12
  - d) Increase # of givers at from \$5K to \$10K from 15 to 20
  - e) Increase # of givers from \$3K to \$5K from 34 to 40
  - f) Increase total # of givers from 215 to 225 (more if our membership grows! This is focused on getting non-pledgers in our congregation to pledge)
  
2. Increase culture of giving. (Pledge Team)
  - a) Through communication and leadership from the ministry and worship team, make stewardship an aspect of everything we do (just like spiritual practices, family ministry, social justice, etc.).
  - b) Collaborate with the office and Stewardship team to increase and improve communication about pledging throughout the year.
  - c) Increase pledges enough so that we do not need to charge for Religious Education, and it can be considered part of our ministry.
  
3. Build and maintain a strong pledge team, diverse in backgrounds and identity. (Pledge Team)
  - a) Recruit and invite people who represent important aspects of our congregation (age, race, gender identity, income, family structure, and so on) and necessary skills and talents for an effective pledge team.
  - b) Be transparent about how the team is formed and look at a cross-section of the congregation when recruiting.
  - c) Develop candidates for future pledge co-chairs so that responsibility and experience is shared, and no one is burned out.
  
4. Improve pledge processes to support continuity and congregational health. (Pledge Team)
  - a) Improve the pledge database by adding confidential data in a secure manner, so that we can ask more effectively when there is an opportunity and be more sensitive when there is not.
  - b) Document pledge processes so that future teams have a pattern they can follow and do not duplicate work.
  - c) Increase % of automated electronic giving from 34% in 2019 to 75% in 2-3 years. This was 61% with Vanco but fell in the change to Realm. A higher % of automated giving makes sustaining pledges easier and provides more reliable ongoing income for the congregation.
  - d) Increase efficiency to optimize minister, staff, and volunteer time investment.

- e) Infuse pledge team meetings and work with spiritual practices including opening words, team connection, equity, and appreciation.
5. Increase attendance and participation to raise income beyond 30K. (Auction Team)
    - a) Formalize Auction Plan, Tasks & Timeline with template
    - b) Update Auction Night Software - Work with Administrator to propose updated software
    - c) Expanded messaging with slide and video of current years parties/events –
    - d) New Member reach out
  6. Explore Spring Art Auction. (Auction Team)
    - a) Formalize exploratory committee & format
  7. Create an understanding of stewardship through planned giving and spirit of volunteerism by offering both classes and services related to planned giving. (Planned Giving)
    - a) Maintain the stewardship language to be current on the website and other communication and update with facts and progress as appropriate.
    - b) Sponsor classes on Planned/Charitable Giving that are free and cover the basics of legacy giving, Wills, Health Care Proxy, and Power of Attorney.
    - c) Offer legal services to create the above at a fixed cost for congregation members. Set up pricing with Mike Mernin to initiate this by November 2020.
    - d) Recruit 2 new members to work on stewardship and sub committees. This is done by educating and talking it up. Membership on the finance committee is suggested but not required.
  8. Increase the assets of the Endowment Fund to \$1.5 million that will insure stable annual income of approximately \$75,000 in the annual budget. Such money could be used as general income or applied to a specific area such as social justice, RE and the other pillars of the congregation. (Finance Committee)
    - a) Launch new planned giving campaign targeted to likely givers.
    - b) Make available the services, at nominal cost, of an attorney to assist with estate plans.
    - c) Maintain close contact with all currently known members who have made provisions for Planned Giving to UUCM.
    - d) Follow a policy of applying all funds that come to UUMC via Planned Giving to the Endowment Fund.
  9. Increase the Reserve Fund to a total of \$175,000 from \$70,000 currently. (Finance Committee)
    - a) Target savings in the annual budget of \$20,000 to be applied to the Reserve Fund.
    - b) Follow the policy of applying any annual surplus from the budget to the Reserve Fund.
  10. Raise \$2.5 million dollars for the necessary repairs, replacements, and improvements to our facility. (Buildings and Grounds)
    - a) Execute a Capital Campaign.
  11. Raise total annual spending in budget for the facilities to \$75,000. (From current \$30,000). (Buildings and Grounds)
    - a) Increase budget

12. Make sure there is access to Fletcher Hall for those who utilize wheelchairs. (Buildings and Grounds)
  - a) Provide access from inside the building to Fletcher hall for wheelchairs
  
13. Collect, file, and maintain historical files in a manner which helps to preserve them. (UUCM Archives)
  - a) Determine what items should be preserved and what can be discarded. Discard by May 2021.
  - b) Plan for adequate storage of archival items. This should be done by May 2022.
  - c) Submit a budget/estimate of costs to the Board of Trustees on an annual basis
  - d) Obtain technical and financial resources to digitize records. This should be done by September 2021 for FY22 budget
  - e) Prepare a succession plan for the Archivists. (We are growing older!) This should be ongoing but with concrete organizational ideas by May 2021.
  
14. Increase awareness and involvement. (UUCM Archives)
  - a) Conduct workshops and programs to inform people about the archives.
  - b) Provide advice about conservation.
  - c) Research and provide documents on request.
  - d) Recruit volunteers to learn and work in the Archives.
  
15. Prepare for emergencies that could impact UUCM including fire, active intruder, medical emergency, and environmental threats. (Emergency Preparedness Safety Team)
  - a) Conduct yearly fire drill in conjunction with the Montclair Fire Department for both worshipers and RE classes
  - b) Periodically train greeters/liturgists/RE teachers/ staff for fire and active intruder emergencies and on the use of the defibrillator
  - c) Develop a plan to assist disabled individuals in evacuating the building during emergency
  - d) Enhance exit maps in each room/area at UUCM
  - e) Conduct Yearly inspections of fire extinguishers and alarms
  - f) Purchase bleeding control kits and install in building
  - g) Identify congregants who have medical/first responder training
  - h) Buy a generator for UUCM for extended power outages
  
16. Improve facility security. (Emergency Preparedness Safety Team)
  - a) Procure video cameras for entrances to building and remote unlocking capability for office staff
  - b) Install push bar releases on all exterior doors
  - c) Procure a more robust, permanent intercom system
  - d) Reinforce/replace some of the more rickety classroom doors
  - e) Re-apply for the church safety grants that we applied for in 2019
  - f) Install fire escape for Senior Youth Room
  - g) Procure new lift/elevator outside the Alliance room to evacuate disabled congregants from front of Sanctuary

17. Establish a more collaborative relationship with our Central East Regional representatives to enable us to make better use of the resources available to us. (Denominational Affairs)
  - a) Invite our primary contact, Paula Cole Jones, to a service and do a meet and greet during coffee and connection hour.
  - b) Research the UUA website and determine areas or subjects of interest to the congregation. Make that information available to the congregation at large as well as to relevant committees, groups and teams within the congregation.
  - c) Act as the point of contact for members seeking information or guidance with respect to a topic of interest.
  
18. Achieve full participation at the General Assembly and increase awareness of its agenda, both throughout the year preceding it and during the Assembly itself. (Denominational Affairs)
  - a) Actively recruit potential delegates via panel discussions with past attendees, direct outreach and other means as warranted.
  - b) Direct interested members to the website and other resource materials.
  - c) Promote participation from home as well as onsite participation.

## Appendix F – Welcome and Engagement

### Objectives and Activities:

1. Develop an outreach plan to raise awareness of UUCM in the local community. (Membership)
  - a) In the Fall/Winter 2020, develop a concise, repeatable plan that defines how, when and with whom we will do outreach. Three membership team members will work with the Communications and the RE Teams.
2. Develop a concise, repeatable In-reach plan to support new and current members. (Membership)
  - a) Three membership team members will develop the in-reach plan by the spring of 2021. Plan will define who we need to reach within our congregation and ways in which we can support them.
3. Increase the presence and visibility of the Membership Team within congregational life and activities. (Membership)
  - a) Membership Team members will be present at UUCM events, wearing recognizable apparel. Beginning winter 2020 and continuing, team members will work with the Communications Team to develop the team apparel.
4. Grow the UUCM membership in size and diversity by signing 75 new members by the end of 2023. (Membership)
  - a) Starting now until June 2022, increase the size of the Pathways class in order to draw in new members. Liaise with the Pledge Team to better educate new members on the importance of pledging.
5. Ensure UUCM exposure in all media outlets (internal and external). (Communications)
  - a) Team will generate press releases that are well-written and that conform to standard formats required by local media. Success will be judged by how often they are picked up and run by local media. Committees, ministers, etc. who are organizing events will help team members coordinate.
6. Create flyers mainly for internal communication. (Communications)
  - a) Design, write and produce flyers and compatible online ads to advertise UUCM events and programs. Materials will be created and available soon enough to impact awareness and turnout. Committees, ministers, etc. who are organizing events will help team members coordinate.
7. Conduct external advertising. (Communications)
  - a) Submit advertising to local newspapers and publications, both print and digital. Conform to UUCM “branding” for recognition and a coherent message. Identify individual volunteers who have the skill and experience to prepare materials.

8. Keep UUCM social media and website updated. (Communications)
  - a) Receive timely and accurate information onto the website, onto Facebook, Instagram, Twitter, etc. Information needs to be accurate, professional, and appealing and done quickly enough to be effective. Coordinate with Office and Communications Manager.
9. Publish Gazette monthly. (Communications)
  - a) Write short articles and announcements that follow the guidelines in terms of space and that meet deadlines.
10. Overhaul the UUCM website every four years to conform to the latest technology and trends. (Communications)
  - a) Update the look to reflect the changes at UUCM. Will require research and proposal by someone skilled at redesigning websites. Create a timeline to accomplish.
11. Ensure sufficient coverage of Connection Café throughout the congregational year. (Connection Café)
  - a) Each congregational year, ensure coverage every Sunday from Sept. till June by UUCM groups and by CC. Acknowledge and recognize those groups and individuals who ensure coverage.
12. Ensure that the dietary needs of CC visitors are met. (Connection Café)
  - a) Make sure there is gluten-free food and at least 1 dairy creamer and 1 non-dairy creamer; make sure that there is a balance of baked goods, protein, vegetables, and drink options; keep nonperishable options in stock for gluten-free foods, children who want a snack after the second service; and provide a reimbursement option for hosts who would like reimbursement. Our goal is to increase protein and hot food options.
13. Increase the number of visitors to Connection Café. (Connection Café)
  - a) Do outreach to the broader community, function as a conduit to stoke interest in congregational life beyond Connection Café. Make Connection Café an attractive weekly 'event' for nourishment, social interaction, and the other types of entertainment and education, including music, the arts, the existing information tables currently in use, and other potential 'draws'. In order to increase the focus on inclusion, showcase people and artistic expression from various backgrounds. Encourage input of ideas for activities to be included in Connection Café experiences.
14. Improve overall satisfaction with the Connection Café. (Connection Café)
  - a) Develop a satisfaction survey to cover the different aspects of the experience, from coffee and other hot drinks, to food, engagement, sense of inclusion, etc. Survey will be brief and focused, with one question in the year in one survey: "Are you satisfied with the Connection Café?" The survey question will be asked using the same words each year. Allow for open-ended responses. Launch the survey by mid-January 2021 and release the results in 2021.
    - i. Possibly provide a suggestion box with responses read regularly.
    - ii. Use the theme for each month by providing a white board so people can write about how they are experiencing the theme in their lives.



15. Increase collaboration between Connection Café and other UUCM groups and committees. (Connection Café)

Continue to use the calendar system created by Rev. Anya. Carol McGough has successfully tracked the calendar of who is hosting and to send reminders.

16. Ensure greeter service standards are met. (Greeters)

- a) Continuously recruit Potential greeters.
- b) The Head Greeter develops and implements best practices.
- c) Train the Greeters on what is expected of them to meet greeter service standards and provide them with the information they need to answer visitor and congregants' questions.
- d) Maintain the greeter handbook in the Narthex.
- e) Train Greeters what to do in case of emergency (such as an intruder, a fire, etc.).

17. Maximize participation in Harvest the Power by current and prospective lay leaders. (Harvest the Power)

- a) Identify current congregational leaders who have not been through HTP and encourage them to participate.
- b) Identify (perhaps from committee and team leaders) individuals serving on committees and teams who might be groomed for leadership and encourage them to participate in HTP
- c) Raise awareness of HTP among newcomers and the congregation at large.
- d) Mentor and establish 8-10 leaders who declare an area of commitment each year.

18. Increase engagement and stewardship of Harvest the Power graduates such that graduates become actively engaged in an area of ministry for a minimum of one year. (Harvest the Power)

- a) Institute a tracking mechanism to identify how many/what percentage of Harvest the Power graduates become involved in leadership within one year of completing the program.

19. Create a network of support and engagement while building the Harvest the Power community. (Harvest the Power)

- a) Develop an outreach plan to connect past graduates to current participants (June 2020). Seek input and collaboration from past grads and current leaders on curriculum and facilitation of workshops. Engage/invite past graduates to share their leadership journeys establishing healthy leadership presence, interaction and inspiring purpose and vision (October 2019-2021).

## Appendix G – Worship and Celebration Actions

### Objectives and Activities:

1. Provide a wider variety of music (e.g., classical song instrumental, Latin American, Middle Eastern) and other artistic offerings and align with our monthly themes. These can include incorporating film, dance, drama in a holistic way that will also support faith development and welcomes new members into the congregation through a variety of artistic pathways.
  - a) Figure out what variety we offer and what we want to offer.
  - b) Measure what we offer and determine what we want to offer and associated costs.
  
2. Redesign narthex area to make it more inviting, informing, and comfortable.
  - a) Design a more welcoming and more accessible area. Better display materials and make the badges more accessible, organized, and wearable.
  
3. Redesign of balcony areas to make it the hub for all technology and recruit tech volunteer(s) to run visuals and sounds for services and other events. This also includes AV filming capabilities, improved sound, speakers, microphones in the main congregational area below.
  - a) Sound and visual control from the Sanctuary balcony.
  
4. Foster, through program development and intentional collaboration, a deeper and more deliberate connection between Family Ministries and the Worship and Celebration Ministries.
  - a) Improve the overlap between Family Ministry and Worship/Celebration and make changes so that worship and our sanctuary is more closely linked to Family Ministry. Utilize the music program, children's chapel, and intergenerational worship services as avenues for greater collaboration and work to ensure that children and youth have positive experiences of inclusion while engaging in Worship and Celebration Ministries.
  - b) Increase the number of intergenerational musical offerings from the current number of 3 to 5.
  - c) Increase the number of children's chapels that include the participation of at least one minister from the current 1 to 3.
  - d) Increase the number of children in attendance at the multigenerational worship services from the current number of 1 to 3.
  
5. Share the resources currently reserved for Sunday morning worship (such as regular publicity, collaborative worship gatherings, and the music ministries) with groups that offer alternative opportunities for worship and celebration.
  - a) 360-degree focus on the Sacred Wheel Pagan group to create a success story with representing another type of worship and spiritual strengthening within the congregation.
  - b) Have 2 congregational groups regularly offer opportunities for worship.
  
6. Enhance the Memorial Garden Space to be a more spiritual place of reverence and memorializing.

- a) Make permanent beautiful signage that identifies the Memorial Garden, provides a means for having names listed permanently, and add something to inspire including possible quotations and even perhaps a running water fountain.
7. Hire a part-time accompanist/staff person leading to assistant music/arts director as span and scope of music continues to expand in the congregation.
- a) Person to run additional choirs and to help conduct and play during services. This would include accompanist during services, director of choirs other than the main choir (children's classical, etc.). Also helping to run rehearsals for larger choir services like Christmas.
8. Create an internship for music in alliance with Montclair State or another local college.
- a) Create this program to rotate bi-annually

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Carolyn Burr	Nancy Franklin	Abby Kessler	Matt Silverman
Teresa DeSousa	Dottie Hiebing	Dennis Kurtti	Laura Wilson

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Lauren Carlton	Brian Crooks	David Lewis	
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