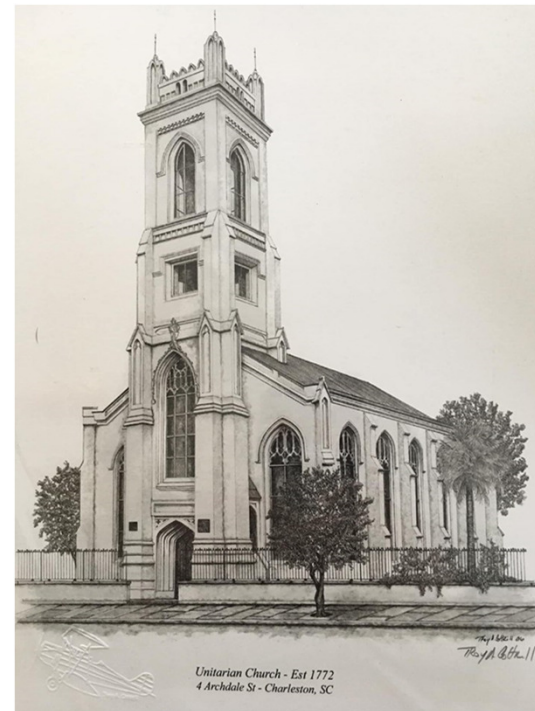




# Unitarian Church in Charleston

## *Strategic Plan 2020-2025*



# Plan Overview

---

- Planning Purpose, Process, and Teams**
  - The Church Today: Who we are, what we do, and why**
  - Driving and Restraining Forces**
  - Church Comparators**
  - Mission/Vision**
  - Global Outcomes and Metrics**
  - Top-level Strategies**
  - Ministry-specific Strategies and Core Programs**
-

# The Purpose and Process

---

In our strategic planning process we sought to make use of the work that has gone before, be inclusive of many perspectives within the congregation, and shape our strategies in a collaborative way.



# Long Range Planning Board Members

---

<u>Name</u>	<u>Task/role</u>
<input type="checkbox"/> Priscilla Shumway task force (Vestry Chair)	Program Facilitation, Team Organization, Strat plan
<input type="checkbox"/> David Messner plan task force (Interim Minister)	Program Facilitation, Strategy Development, Strat
<input type="checkbox"/> Diane Narkunas	Recorder and data analysis, Strat plan task force
<input type="checkbox"/> Bill Walsh	Facilitator
<input type="checkbox"/> Mary Ellen Geiss	Facilitator, recorder, survey
<input type="checkbox"/> Danielle Lopez	Benchmarking
<input type="checkbox"/> Margaret Grant	Data analysis
<input type="checkbox"/> John Newell	Past documentation and benchmarking
<input type="checkbox"/> Sarah Arnold	Survey, analysis, facilitate, recorder
<input type="checkbox"/> Mike Griffith	Facilitation and past documentation
<input type="checkbox"/> Maureen Porter	Facilitator, past docs
<input type="checkbox"/> Suzanne Hardie	Strat plan task force
<input type="checkbox"/> Karen Ruef	Strat nlan task force. recorder

# Where We Are Today at a Glance

---

## Journey

- ❑ 200+ Year history in Charleston with Christian congregationalist roots
- ❑ The Mother Church of Southern Unitarianism
- ❑ Growth phase in past decade fueled by both internal and external ministries
- ❑ Disruption of a ministerial negotiated resignation, exacerbated by history of ministerial misconduct
- ❑ Transition Ministry, Virtual Church During Pandemic, New Ministerial Search

## Profile

- ❑ Transitional, Mid-Sized Historic Congregation (approx. 400 members)
  - ❑ Long-tenured membership is primarily older, retired.
  - ❑ Newcomers skew younger and more diverse in demography and theology
  - ❑ Population dynamics of Charleston are favorable to liberal religion
-

# Where We Are Today at a Glance (continued)

---

## Programs

- Worship attendance now stabilized after multi-year decline
- Fellowshiping is practiced in many joyful ways
- RE program smaller than previously, but running effectively and poised for post-COVID growth
- Social Justice Activities are meaningful, but concentrated
- Adult Spiritual Development in early stages though key programs have high participation

## Resources

- Extraordinary church building in the historic center of town
  - Strong lay-led teams and effective core staff
  - Financial support has been well sustained, and a meaningful endowment is in place securing future viability
-

# The Purpose of the Church

---

**Based on the feedback of the current community through group visioning, interviews, and surveys, we gather as a religious body to:**

- Build community
  - Create safe space
  - Care for each other
  - Inspire us to better lives in line with our values
  - Connect people to each other
  - Work for social justice
  - Serve the larger community
-

## Our Existing Strategy

---

The last Strategic plan was formulated prior to 2008, and was summarized in the Four Bold Steps:

- ❑ **1st bold step** – Nurture and connect the people of our congregation
  - ❑ **2nd bold step** – Become leaders in social justice in our local and UU communities
  - ❑ **3rd bold step** – Ensure the sanctuary outlives us all
  - ❑ **4th bold step** – Prepare for church growth
  - ❑ **Supporting action** – Financial abundance to support church activities
-



# The Character of Our Community

---

We explored the qualities that people associate with who we are with a focus on those that are conducive to accomplishing our mission, when we are “at our best.” Our growing edges (ways we want to develop) go alongside each of our identity strengths.

## Who We Are

- Welcoming and accepting
- Democratic and inclusive
- Caring, compassionate, and loving
- Generous expression
- Committed
- Inspiring “religiousness”
- Intellectual and smart

## Growing Edges

- Recognizing our identity & holding boundaries
  - Diversity and empowerment
  - How and where we show it
  - Different ways of
  - To the same things?
  - Varied desires for
  - Connecting our hearts
-

# Driving and Restraining Forces

---

## Driving Forces (moving us forward)

- Energizing worship life at center
- Competent and committed staff in lead positions (ED, RE, Music)
- Landmark church building
- Partnering w/ other congregations and organizations
- Well-developed volunteer teams
- Able governance teams and improving systems
- Substantial growth over past decade
- Stalwart financial/giving support
- Willingness to experiment, learn, and to build new relationships

## Restraining Forces (holding us back)

- No consensus on who we are as a “church”
  - De-emphasis on personal spiritual deepening and development
  - Uneven trust of ministers/staff/leadership
  - Limited experience of shared ministry
  - “Committee” culture over “ministry” culture
  - History of limited transparency
  - Ambivalence about growth
  - Relatively low profile in Charleston area
  - Fragmented community programs
  - Geographic spread with limited parking & building space
-

# Benchmarking Our Peer Group

---

We selected a group of comparator churches for study based on region, size, demography and reputation.

Cong ID	Congregation	City	State	UU Members	RE Enrollment	Avg Attendance	Pledging Units	Total Expend.	Pledging Income
1	Unitarian Universalist Fellowship of Raleigh	Raleigh	NC	571	175	232	574	\$582,614	\$529,071
2	Unitarian Universalist Congregation of Asheville	Asheville	NC	522	112	282	370	\$697,700	\$636,600
3	First Unitarian Church of Providence	Providence	RI	504	153	253	309	\$191,946	\$399,700
4	Unitarian Church of Baton Rouge	Baton Rouge	LA	479	129	253	240	\$477,120	\$488,894
5	First Unitarian Church of Des Moines	Des Moines	IA	474	116	129	324	\$681,631	\$658,883
6	First Unitarian Universalist Society of Burlington	Burlington	VT	455	154	307	317	\$852,673	\$461,364
7	South Church	Portsmouth	NH	449	130	250	277	\$575,151	\$447,000
8	Tennessee Valley Unitarian Universalist Church	Knoxville	TN	443	123	179	272	\$527,223	\$493,485
9	UU Congregation of Columbia	Columbia	MD	428	133	294	320	\$798,400	\$754,000
10	The Community Church of Chapel Hill UU	Chapel Hill	NC	423	187	360	279	\$582,232	\$462,799
11	First Unitarian Society of Minneapolis	Minneapolis	MN	420	45	200	279	\$712,599	\$450,171
12	Unitarian Church of Evanston	Evanston	IL	418	44	229	290	\$710,685	\$750,694
13	Thomas Jefferson Memorial Church UU	Charlottesville	VA	416	162	217	314	\$490,550	\$338
14	Unitarian Church in Charleston	Charleston	SC	410	70	180	265	\$425,180	\$379,848

---

# Comparative Study Points

---

**We studied each benchmark congregation to identify:** Performance Metrics, Major/Innovative Programs in Core Ministries, Strategies for Growth, Financial Model, Governance and Operations Model and any challenges related to growth and how they have overcome them.

## **Specific areas of study:**

- Church “Mission and Vision” statements**
  - Church membership size. Staffing levels and the positions?**
  - What programs have been most critical in driving growth and reaching new segments?**
  - Worship and RE**
  - Social Justice** (articulated areas of focus, Cornerstone Programs, Charitable Giving, Community Partnerships?)
  - Fellowship**
  - Fundraising and Membership** (outreach, programs, systems and strategies for retention)
-

# Comparator Church Activities of Interest

---

## **Worship**

- Multi-Services (same content)
- Multigenerational Engagement

## **Social Justice**

- Share the plate giving programs
- Action Teams: Immigration & Climate
- Community Gardens
- Microfinance

## **Fellowship Building**

- Intergen Penpals
- Theatrical/Musical Productions
- Movie Nights
- Outdoor Groups - Hiking
- Bookstore
- Whole Church Retreats
- Affinity Groups (LGBT and Women's)

## **RE/ASD**

- Spiritual Practice Groups: Tai Chi, Yoga
- Creative groups (Writing and Arts)
- Bible Study and World Religions
- Youth Group
- Covenant Groups

## **Pastoral Care**

- Trained PC Associates
- "Old fashioned" phone trees, member-to-member networks
- Online Support

## **Outreach**

- Print Advertising
  - Digital Presence
  - Virtual Church
-

## Looking Toward the Future

---

As we moved from descriptive work (reviewing our history, our current position and our external reference points) to prescriptive work we began with an assessment of the way we articulate our mission and vision, with an emphasis on what is essential and unifying.

From this, our desired outcomes, metrics, and core strategies naturally flowed.

We chose a small handful of priority ministry areas to further expand, with hope that this top level perspective and model would enable teams to replicate and refine the strategic work in a cycle of annual plan implementation.

---

## Mission and Vision

---

*The Unitarian Church in Charleston is an inclusive community of inspiration, love, and service committed to creating a better world.*

**CHARLESTON**

---



**UNITARIANS**

---

# Clear and Simple Branding

---

CHARLESTON

---



---

UNITARIANS

---



# Global Outcomes

---

**Through our ministries, the members of the Unitarian Church in Charleston will:**

1. Develop as a community of love, integrity, reason, inspiration, and deep connection.
  2. Accept ourselves and all people for who we are, people of worth with diverse backgrounds, identities, and gifts.
  3. Remain open-minded about others' beliefs; learn from them and actively support others in their spiritual journeys.
  4. Realize more enriched and fulfilled individual lives.
  5. Develop spiritual practices that nurture reverence, connection, and joy.
-

## Global Outcomes

---

6. Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment.
  7. Grow as a congregation because the community sees who we are through our actions and feel invited to become part of our church.
  8. Engage vigorously in the mission and activities of the church.
  9. Build capacity to cultivate experienced leaders to do the work and ensure we have the financial and human resources to sustain the ministries of the church.
-

# Global Metrics: Church Vital Signs

---

1. **Discovering:** # of people visiting the church annually
  2. **Worshipping:** # of people worshipping weekly quarterly average (versus prior quarter and year over year), % of congregation worshipping at least once per quarter
  3. **Serving:** #/% people engaged in volunteer activities engaged during the month
  4. **Participating:** #/% of people participating in major events and beginning new activities
  5. **Leading:** # of new leaders from historically under-represented groups [e.g., younger people, LGBTQ+ persons, black/indigenous/people of color, lower socioeconomic status individuals, persons w/ disabilities]
  6. **Joining:** #of members joining, % of members retained by year of membership (net of death and relocation)
  7. **Giving:** \$ Total, #/% of Units pledging
  8. **Fulfilling:** Annual Personal Growth Survey
-

## **Six Key Strategies to Inspire, Love, and Serve**

---

- 1. Express our religious identity through word and action**
  - 2. Invite and empower other people relentlessly**
  - 3. Ensure physical and virtual capacity for involvement**
  - 4. Drive concentrated engagement**
  - 5. Pursue a “Triple Bottom Line” in every activity**
  - 6. Enact trusting and effective shared ministry**
-

# Express Our Religious Identity

---

**The key to this strategy is that in everything we do, we take time to reflect on and articulate its connectivity to who we are.** Mindfulness in the “why we do what we do” and the “why it is important to us.” This mindfulness and sharing with those entering our community is the work of the entire congregation.

As a result, the church will increasingly be anchored in a set of shared understandings, commitments and practices, even as those continuously evolve, and as diversity is nurtured.

- ❑ **Mission/Vision:** Why are we all here? To Love, Serve and Inspire!
- ❑ **Faith, Principles, and Values:** Neither uniform nor creedal, but increasingly overlapping as dialogue and engagement organically shape who we are as a church family.
- ❑ **Practices:** What we do determines who we are. How do we live into the slogan “*deeds, not creeds?*”  
*How do we walk the talk?*

Churches which are not anchored, are primarily constituted as clubs where “like” people gather. They tend to have limited “stickiness” and difficulty growing and transitioning from generation to generation.

***UC-CHS is a place where we: Show and Tell***

---

# Invite and Empower People Relentlessly

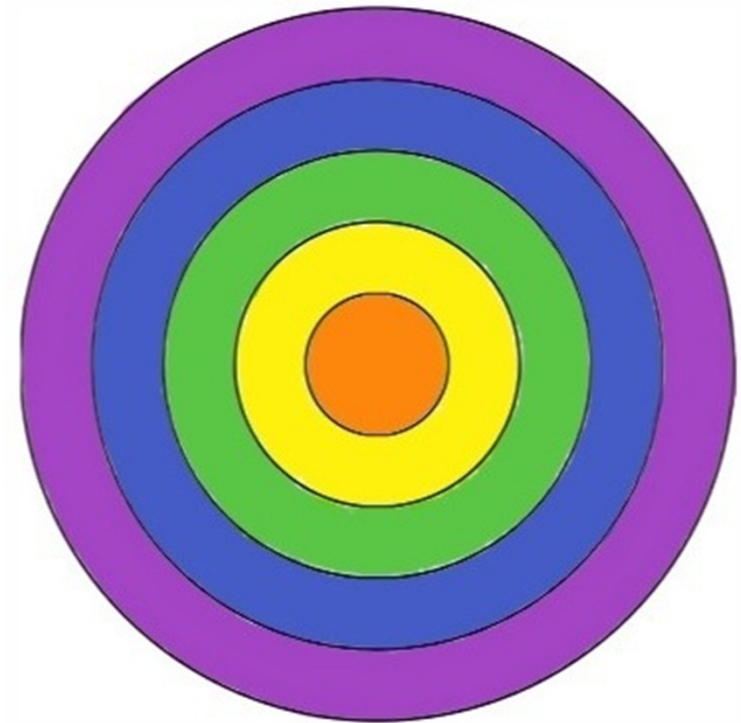
---

Our community comprises people at different levels of discovery, engagement, and commitment from the long timers who lead at the center to those with connection and awareness but low engagement in the outermost ring.

Invite people inward:

- Invite people to participate
- Invite participants to lead
- Invite leaders to be builders
- Invite long time builders to step back to make space
- Teach everyone to invite others
- Leverage paid religious leaders
- Recognize and appreciate in 3 ways those who serve

Applies to Vestry, Staff, and the Minister as well as the whole congregation and the community beyond.



*UC-CHS is a place where we: **Gift Someone an Opening***

---

# Ensure Capacity for Participation

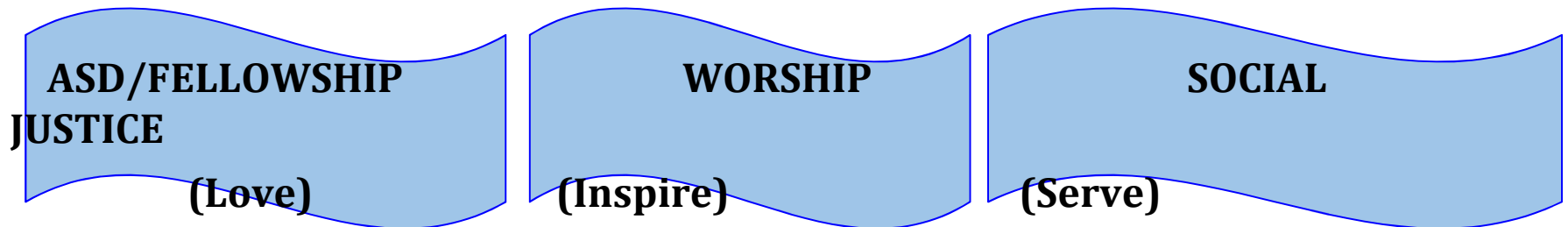
---

## Accessibility:

- Is it obvious how to begin participating and easy to re-engage after absence?
- Systems AND Culture both must make it so.
- Can participation in most activities be virtual?

## Scalability and sustainability

- Does every program always have room for another participant?
- Are there new leadership opportunities? Is there a succession plan in place?
- Can the group be replicated?



*UC-CHS is a place where we: **Keep an Empty Seat at the Table***

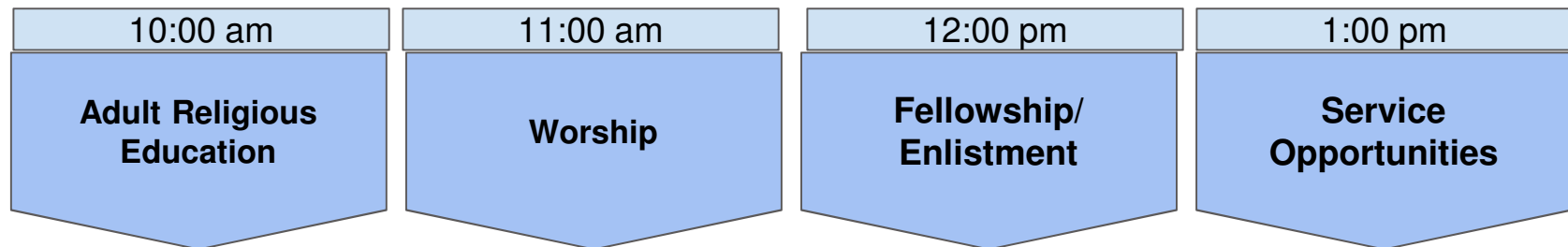
---

# Drive Concentrated Participation

---

## Reducing barriers to greater engagement:

- Recover traditional habits of Sunday church participation and reinforce its communal importance in our cohesion as one church
- “Thicken” the Sunday experience with worship for all, faith formation, fellowship, & service add-on options weekly
- Leverage technology to create sustained virtual worship and other opportunities
- Assess additional worship times, forms, and settings



*UC-CHS is a place where: **Sunday is for Church***

---



## Watch a (Triple) Bottom Line

---

Let's suppose we start a soup dinner with the intent to "Feed the Hungry."  
There are different questions we might ask when measuring this ministry:

1. Is the soup edible, is it delicious even?
2. How many hungry people did we feed with the soup?
3. How many people were involved (or more involved) in making the soup?
4. How did we strengthen the church to feed people in the future?
5. How much money did we collect as a result of the soup eating?

Now, #1 matters because edible soup is a prerequisite to feeding people, but creating ever-more exquisite soup is not. Some events may produce funds that fuel the ministry further but is not a central measure (#5).

*UC-CHS is a place where we: **Do it, Grow it, and Build it for the Future***

---

# Embrace Shared Ministry

---

**Development of effective shared ministry** is about a process of growing into a respectful mutuality...

- ❑ in which complementarities are developed and spheres of authority and autonomy are recognized;
- ❑ in an environment of respect; and
- ❑ underlying reverence for the larger project of which are both a part and co-creators.

Working together, the Congregation, Vestry, Minister, and Staff bring clear role definitions and trusting relationships which empower the team to act and to thrive amidst an ever-changing environment with new challenges.

Central to this is the very simple insight that we are one team and must support each other to “succeed” as a religious community.

---

## Embrace Shared Ministry (continued)

---

### The ministerial contract is a critical resource for this commitment:

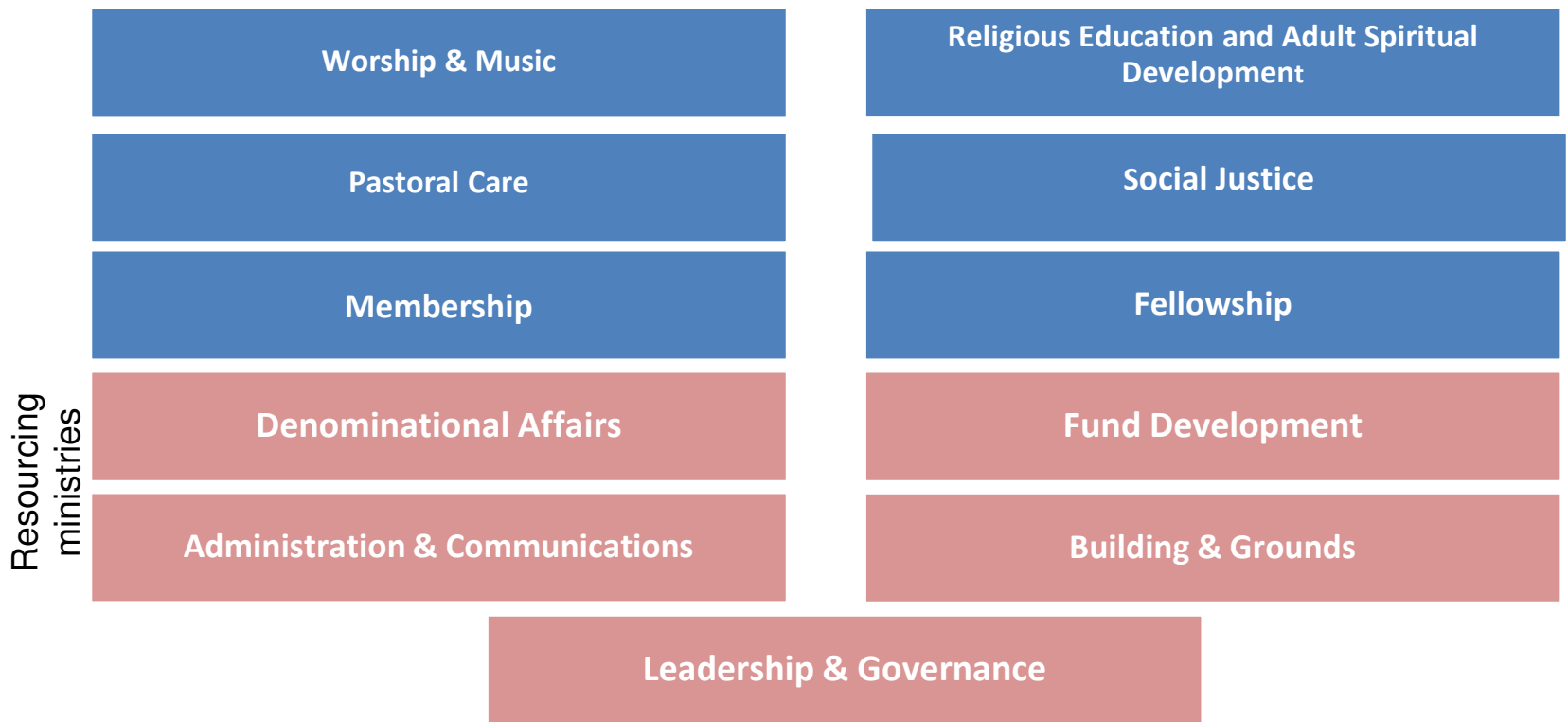
- ❑ Shared responsibility for the leadership and ministry in a relationship of mutual discovery.
- ❑ The Congregation looks to its Minister to provide spiritual leadership and initiative, assistance in setting and articulating its vision, leadership and supervision of the staff team, professional and inspired performance, and oversight of programs and administration in collaboration.
- ❑ The Minister looks to the Congregation to live out its mission and vision, demonstrate effective leadership, be open to change, broaden the meaning of community, and to communicate issues or concerns that may arise in a forthright and respectful manner.
- ❑ The Vestry commits to remaining in covenant with the Minister and holding members of the Congregation to behavior that is respectful to minister and staff.

*UC-CHS is a place where we know: **There's more than one "I" in Ministry***

---

# Current Ministries of the Church

---



# Priority Ministries: Strategies and Programs

---

- ❑ **Worship & Music** -- Sustain excellence and ensure participation opportunities in “live” and virtual spaces
  - ❑ **Social Justice** -- Focus and balance as increasing numbers of members enter participation
  - ❑ **RE & AFD** -- Jump-start and Grow the program for children and families
  - ❑ **Fellowship** -- Define and expand to ensure a robust portfolio which maps to the needs and interests of different demographic and psychographic groupings in the church
  - ❑ **Membership** -- Systematize practice to ensure continued welcoming and inclusion.
-

# Worship & Music: Strategies and Programs

---

## ❑ **Worship--specific strategies**

- ❑ Build center of gravity in Sunday Worship
- ❑ Homemade, Authentic, Spirited
- ❑ Create sustained practices and a local “canon” of texts
- ❑ Broad, diverse, and visible participation to reflect the church ethos
- ❑ Intentional and stable liturgy and liturgical calendar

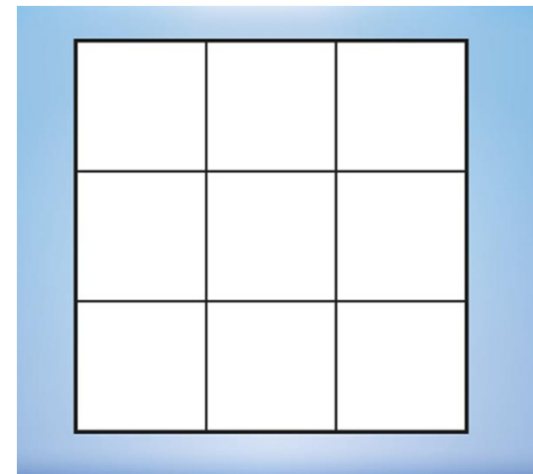
## ❑ **Music--specific strategies**

- ❑ Build center of gravity with the choir/group music programs (Lifespan)
  - ❑ Homemade, Authentic, Spirited
  - ❑ Create sustained practices and a local “canon”
  - ❑ Broad, diverse, and visible participation to reflect the church ethos
-

# Social Justice: Strategies, Programs, Metrics

---

- ❑ **Social Justice specific strategies**
  - ❑ Be Locally Grounded
  - ❑ Sustain Focus on Priority Areas
    - ❑ Oppression and Inequality
    - ❑ Environmental Action
    - ❑ Education
  - ❑ Create a balanced portfolio
    - ❑ Lead, Partner, Follow
    - ❑ Advocacy, Service, Philanthropy



# Social Justice: Balanced Program

---

	Advocacy	Service	Philanthropy
Lead	<i>Medicaid Expansion</i>	<i>Refugee Settlement Green Sanctuary</i>	<i>Coffeehouse Mini Grants</i>
Partner	<i>CAJM</i>	<i>Community Outreach pgms</i>	<i>CAJM Investment</i>
Follow	<i>Arm in Arm AFFA – LGBTQ Rights</i>	<i>Backpack Buddies</i>	<i>Sunday Services Offertory Plate</i>

---



## Social Justice Program Checklist

---

- Do we have leadership and congregational support?
  - Have we met our commitments, both in outcomes and financially?
  - Have we included as many church members as possible?
  - Have we gotten community support?
  - Have we gotten community involvement?
  - Have we included the Youth and even the Children?
-

# Growing Ministry: RE and ASD

---

**Lifespan Faith Formation is an important growing edge.** The programs in this ministry are first segmented broadly by age.

- ❑ **Sunday School:** Offering a robust Sunday morning educational experience for our children from pre-K through 8th grade that draws committed participation.
  - ❑ **Youth Group:** Creating separate customized opportunity for youth to express leadership and have their own formative experiences in church.
  - ❑ **Adult Spiritual Development:**
    - ❑ *Religious* education opportunities - Expanding the portfolio and making regular participation normative
    - ❑ Connecting Circles - ensuring that newcomers are continually integrated into circles and that the circles are connected to spiritual as well as social development.
-

# ASD/RE: Strategies

---

## ASD/RE specific strategies

- ❑ Prioritize “Journey Groups” for all ages (journey groups are those that stay together week after week, or month after month, so members have a chance to form strong community)
- ❑ Empower members to be leaders and learners to be teachers (beginning with the youth!)
- ❑ Teach relevant “religious” ideas and spiritual practices across the lifespan
- ❑ Attend to different segmentations and different formation needs of each cohort



# ASD/RE: RE Programs

---

Sunday School (Overlapping with the main weekly worship service). Using national curricula for core programs. Offering special milestone opportunities (e.g., OWL, COA, Bridging).				
<b>PROGRAM GRID</b>				
<b>Stages/Grades</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-21</b>	<b>2021-22</b>
Pre-K		Soul Matters	Chalice Children	Soul Matters
K-2	Soul Matters	Soul Matters	Creating Home	Soul Matters
<b>**K-1</b>			<b>**OWL</b>	
3-5	Soul Matters	Harry Potter	Signs of Our Faith	Harry Potter
<b>**5th-6th</b>		<b>**OWL</b>		
6-8	Soul Matters	Neighboring Faiths	The 5th Dimension	Neighboring Faiths
7-9	OWL	<b>**Split up</b>	OWL	Coming of Age
High School		Teaching Tolerance/ Coming of age	Be the Change	Exploring our Values Through Poetry +YOUTH GROUP

# ASD/RE: ASD Programs

---

## Weekly Programs

- Sunday Forum
- Bible Study
- Buddhism Study
- Meditation
- Music Sharing Circle
- Clergy Talk Show
- Pastoral Consultations
- Lunch w the Minister

## Monthly Programs

- Newcomers' Time
  - Books & Coffee
  - Religious Naturalism Group
  - Men's Group
  - Parenting Circle
  - Covenant Circles
  - Minister's Seminar
  - Current Affairs Roundtable
-

# Fellowship

---

**Establishing a year round calendar of social events to provide entry points for newcomers. Current events are highly successful:**

- Coffee Hour Break-out groups
- Halloween Party
- Auction Night and Auction events (year-round)
- Christmas Party
- Oyster Roast
- Alliance Brunch
- Pride Float Decorating Party
- Easter Egg Hunt
- Souper Bowl Sunday

Management of the fellowship calendar with attention to gaps and newcomer inclusion will be a priority during the plan period.

---

# Membership

---

**Membership is the driving engine behind all the other ministries of the church and must be developed.**

- ❑ Making people aware of the church and its mission and programs
  - ❑ Exposing people to the church in a deeper way
  - ❑ Bringing people into the church for worship
  - ❑ Engaging in conversations about the church and inviting people to participate
  - ❑ Shepherding participants toward commitment in the church through membership and investment
  - ❑ Continuously integrating and re-integrating members through a cycle of renewed Discovery, Engagement, and Commitment.
-