

# **The Champlain Valley Unitarian Universalist Society Long-Range Plan**

**The CVUUS Board of Trustees**

**December 2021**

## **Introduction**

What does CVUUS want to be five years from now? How might we make that happen? These were the Board's guiding questions as we prepared this plan. We intend for this document to support the work of the congregation and the staff by providing guideposts to help us keep our goals and planned activities in mind.

We gathered input in various ways throughout the process of putting this plan together (see the Appendix for details), and found that four theme areas emerged, leading to the four sections below. Each section begins with a statement of purpose and a set of goals. The action steps within theme areas identify responsibilities of lay leaders and staff, along with rough timelines. After each set of action steps, you'll find indicators of progress, to help us be accountable to ourselves and each other.

These are guidelines, not rigid prescriptions! An annual review by the Council of Ministries is built in, giving CVUUS a chance to adjust its plans to current conditions as necessary. Also, the plan also does not tell the whole story of our living, breathing organization, because no single document could. There are overlaps among the four theme areas, and the CVUUS community is home to many small miracles that aren't seen by everyone but nevertheless make for a stronger whole. Still, we believe that by articulating the aspirations that we heard from leaders and congregants and shaping action plans around them, we stand a good chance of moving forward in exciting ways.

It must be noted that the COVID-19 pandemic has affected the development of this plan. Most obviously, this document has come together later than it might have otherwise. It was also more difficult to gather input from you all, and it's still not clear to anyone what our worship services and other activities will look like in the coming months. We are extremely grateful to so many in the CVUUS community who responded to our requests for input via email and Zoom. The quality of those responses is a wonderful reminder of the strength of our connections to each other and to CVUUS, even when physical togetherness is limited.

## Theme Area I: Enhancing Community and Connection

**Purpose.** We plan to enhance community and connection by

- Increasing the visibility of CVUUS to those who are strangers, while deepening the commitment of those friends we hold,
- Providing worship experiences that nurture and challenge our souls,
- Cultivating social and environmental action pathways, and
- Addressing injustices toward marginalized groups.

**Goals.** We aspire to

1. Shepherd our community through shifting public health conditions.
2. Develop and nurture robust internal and external connections.
3. Build on the existing Social Action Tree, with particular attention to systemic injustice and climate action.
4. Build on our experiences with remote services to adapt and improve the worship experience.
5. Grow into our new space by improving and expanding fellowship and social action activities, and by renting to groups in the larger community whose missions align with our values.

| Action Steps   | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 |
|--|---------|---------|---------|---------|---------|
| <b>1.1</b> The <b>Council of Ministries</b> supports ministries and teams as they adapt to evolving health and safety protocols.   | X       | X       | X       |         |         |
| <b>2.1</b> The <b>Fellowship Ministry</b> continues and expands its outreach to our newest members and maintains connections with members and friends who are more loosely attached to CVUUS, with particular attention to remote community members.             | X       | X       | X       | X       | X       |
| <b>2.2</b> The <b>Fellowship Ministry</b> continues and develops its own fellowship programs (reading groups, outdoor activities, etc.) and serves as a clearinghouse for other lay-led activities (small-group ministries, game nights, dinners at CVUUS, etc.) | X       | X       | X       | X       | X       |
| <b>2.3</b> The <b>Communications Team</b> selects a chair/secretary/coordinator, identifies areas that need attention, and works with the <b>minister</b> and the <b>Council of Ministries</b> to recruit additional members as necessary.                       | X       | X       |         |         |         |

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| <b>2.4</b> The <b>Communications Team</b> raises awareness in the larger community about issues and organizations we support.   | X | X | X | X | X |
| <b>3.1</b> The <b>Social Action Teams</b> come together as a coalition or choose a point person to craft a communications strategy to publicize CVUUS social and environmental justice actions.   | X | X |   |   |   |
| <b>3.2</b> The <b>Donations Ministry</b> and the <b>Finance Team</b> enact a shift to donating 100% of our Sunday plate to outside groups.  |   | X | X |   |   |
| <b>3.3</b> The <b>Council of Ministries</b> works with the <b>minister</b> , the <b>Small Group Ministry</b> leaders, the <b>Social Justice Action Team</b> , and the <b>RE Council</b> to help us educate ourselves about systemic inequities and opportunities to address them. | X | X | X | X | X |
| <b>3.4</b> The <b>Council of Ministries</b> works with the <b>minister</b> , the <b>Small Group Ministry</b> leaders, the <b>Social Justice Action Team</b> , and the <b>RE Council</b> to help us keep climate justice and environmental action in mind in all of our work.      | X | X | X | X | X |
| <b>4.1</b> The <b>Worship Ministry</b> continues to work with the <b>Minister</b> to provide spiritually deep and challenging services, taking appropriate advantage of technology to broaden our reach.  | X | X | X | X | X |
| <b>4.2</b> The <b>Music Ministry</b> assists the <b>Director of Music</b> in bringing a variety of music to worship services and other events at CVUUS and beyond.  | X | X | X | X | X |
| <b>5.1</b> Growing into our new space will be a natural outgrowth of the above steps.   | X | X | X | X | X |

**Indicators of Progress.** We will know we have met our community and connection goals when

**Goal 1** CVUUS congregants of all ages can gather as freely as conditions allow, and leaders can point to wise and creative responses to the pandemic that have strengthened our community.

**Goal 2** CVUUS leads and supports multiple and varied ways for people to find meaningful connections, and those opportunities are actively publicized within and outside of CVUUS.

**Goal 3** CVUUS leads and supports multiple social action and climate initiatives, which are actively publicized within and beyond CVUUS in a coordinated fashion.

**Goal 4** CVUUS offers deeply meaningful worship experiences to congregants on and off site, as appropriate to their needs and the Society's abilities.

**Goal 5** The CVUUS calendar reflects a variety of activities that advance our values.

## Theme Area II. Developing and Sustaining Church Leadership

**Purpose** We plan to develop and sustain church leadership by

- Preparing for and conducting ministerial transition
- Supporting established leaders and training new leaders
- Managing generational transitions

**Goals.** We aspire to

1. Complete an effective search and transition from our current settled minister to an interim minister, followed by a successful transition to a new settled minister.
2. Clarify roles and responsibilities within the leadership structure at CVUUS, with a focus on facilitating communication and collaboration.
3. Create, coordinate, and sustain opportunities for connection within the congregation, with particular attention to generational transition, inclusion, and diversity.
4. Explore whether and how principles and practices associated with *sociocracy* (also called *dynamic governance*) and shared ministry might enhance organizational structures and practices at CVUUS, and begin implementing beneficial practices.

| Action Steps  | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 |
|---|---------|---------|---------|---------|---------|
| <b>1.1</b> The <b>Board</b> , in collaboration with the <b>Council of Ministries</b> , the <b>Minister</b> , and UUA/NED consultants, designs and implements a process and appoints a Team to oversee the selection of an Interim Minister to join us in 2023-2024. | X       | X       | X       | X       |         |
| <b>1.2</b> The <b>Board</b> , <b>Minister</b> and <b>Council</b> complete preparations for Barnaby's sabbatical in Spring/Summer 2022   | X       |         |         |         |         |
| <b>1.3</b> The <b>Board</b> (in collaboration with the <b>Council</b> and UUA/NED consultants) designs and implements a search process for calling a Settled Minister and appoints a Settled Minister Search Team.  | X       | X       | X       | X       | X       |
| <b>1.4</b> The <b>Interim Minister Search Team</b> (in collaboration with the <b>Board</b> , <b>CoM</b> , UUA/NED) designs and implements a process for selecting an Interim Minister for 2023-24.  | X       | X       | X       | X       |         |
| <b>1.5</b> The <b>Settled Minister Search Team</b> (in collaboration with the <b>Board</b> , <b>CoM</b> , UUA/NED) designs and implements a process for calling a Settled Minister.   |         | X       | X       | X       | X       |
| <b>2.1</b> The <b>Minister</b> works with the <b>Leadership Team</b> and the <b>CoM</b> to identify and assess whether essential congregational activities and tasks are being sufficiently addressed.  | X       | X       | X       | X       | X       |

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| <b>2.2</b> The <b>Leadership Team</b> considers and clarifies its roles and responsibilities during a period of ministerial transition.   | X | X | X | X | X |
| <b>3.1</b> The <b>Council of Ministries</b> continues the practice of an annual retreat, where it refines its practices to better achieve its goals.  | X | X | X | X | X |
| <b>3.2</b> The <b>Council</b> asks each ministry and team to submit a mission statement and identify a representative who attends Council meetings.   | X | X |   |   |   |
| <b>3.3</b> The <b>Council</b> reviews its meeting practices and considers a sociocracy model.   | X | X |   |   |   |
| <b>3.4</b> The <b>Ministries and Teams</b> review their meeting and communication practices, and make adjustments as they see fit to align with the aims of shared ministry.  | X | X | X | X | X |
| <b>4.1</b> The <b>Board</b> appoints a team of lay leaders to work with the Minister to explore principles and practices of <i>sociocracy</i> and <i>shared ministry</i> to consider how these might enhance governance at CVUUS. |   |   | X | X | X |

**Indicators of Progress.** We will know we have met our church leadership goals when

**Goal 1** The **Congregation** has voted to call a new settled minister, who has accepted the congregation's call and taken up their duties.

**Goal 2** The **Minister** has, on a regular basis, identified essential congregational activities and tasks and worked with the **Council of Ministries** and **Leadership Team** to ensure that these are being addressed by functional ministries and teams.

**Goal 3** The **Council of Ministries** has further clarified how it might best achieve its goals. Under the Council's guidance, each **ministry and team** at CVUUS has clearly articulated missions and responsibilities, regular processes for succession planning, membership training and recruiting and has implemented steps, with particular attention to ensure generational transition in a way that maximizes inclusion and diversity. The Council conducts an annual assessment of progress toward the goals of this plan, recommending revisions to the Board as necessary.

**Goal 4** A **Team of Lay Leaders** has submitted a report to the Board, Council, and Minister regarding the ways in which principles and practices associated with sociocracy and shared ministry might enhance organizational structures and practices at CVUUS.

## Theme Area III. Planning for Long-Range Stewardship of Church Resources

**Purpose.** We will support long-range stewardship of church resources by

- Sustaining financial stability
- Maintaining and improving facilities
- Fostering planned giving and educating the congregation on the importance of financial stability to meet our broader mission
- Ensuring that our decisions about our resources reflect engagement with the environmental and climate challenges of the day.

**Goals.** We aspire to

1. Fund and maintain an adequate Building Reserve Fund.
2. Develop a financial plan to cover the costs of conducting a search and calling an Interim Minister and then a settled Minister.
3. Build leadership succession planning into the Annual Canvass process, and coordinate other fundraising activities by forming a Fundraising and Assets Committee.
4. Develop a process for encouraging legacy giving.
5. Proactively maintain and preserve our existing structures and land while continually exploring and seeking ways to reduce our carbon footprint.
6. Investigate options and opportunities for funding to update and improve our sound systems and video capabilities.
7. Create a task force to begin planning for the replacement of the Fenn House.
8. Establish a memorial garden and/or other outdoor place for contemplation and meditation.

| Action Steps   | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 |
|--|---------|---------|---------|---------|---------|
| <b>1.1</b> The <b>Finance Team</b> works to fund and maintain a Building Reserve Fund of at least 5% of the value of our total capital assets.   | X       | X       | X       | X       | X       |
| <b>2.1</b> The <b>Finance Team</b> works with the <b>Board</b> , the <b>Minister</b> , and the <b>Interim Ministerial Search Team</b> to develop a financial plan to cover the costs of the search for an Interim Minister.          | X       | X       |         |         |         |
| <b>2.2</b> The <b>Finance Team</b> works with the <b>Board</b> , the <b>Personnel Committee</b> , and the <b>Ministerial Search Team</b> to develop a financial plan to cover the costs of searching for and calling a new Minister. |         | X       | X       | X       |         |
| <b>3.1</b> The <b>Minister</b> and the <b>Canvass campaign leaders</b> establish a pledge drive leadership system of recruiting team leaders for staggered two-year terms.   | X       |         |         |         |         |

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| <b>3.2</b> The <b>Finance Team</b> works with the <b>Minister</b> and the <b>Council of Ministries</b> to establish a Fundraising and Assets Committee.  | X | X        |   |   |          |
| <b>4.1</b> The Board and <b>Finance Team</b> work with the <b>Minister</b> to raise awareness and foster planned giving, sharing with the congregation what opportunities to fulfill our vision that an Endowment could provide.   | X | X        | X | X | X        |
| <b>5.1</b> The <b>Facilities Team</b> works with the <b>Green Sanctuary Team</b> to maintain and preserve our existing structures and land while continually exploring and taking advantage of ways to reduce our carbon footprint.  | X | X        | X | x | x        |
| <b>6.1</b> The <b>Finance Team</b> and the <b>Fundraising and Assets Committee</b> work with <b>Worship Ministry</b> and the <b>Facilities Committee</b> to investigate options and opportunities for funding to update and improve the sound systems in the sanctuary and the Ann Ross Fellowship Hall.                                   |   | X        |   |   |          |
| <b>6.2</b> The <b>Facilities Team</b> works with the <b>Worship Ministry</b> and the tech and sound Teams to investigate options to improve our technological and video capabilities to continue and expand upon the use of video and remote participation during worship that was developed during COVID-19 and increasing rental income. | X | X        |   |   |          |
| <b>7.1</b> The <b>Facilities</b> and <b>Green Sanctuary Teams</b> create a task force to begin planning for the replacement of the Fenn House to meet the evolving needs of the congregation.  |   |          |   |   | <b>X</b> |
| <b>8.1</b> The <b>Facilities Team</b> , the <b>Flower Coop</b> , the <b>Landscaping Team</b> , and <b>Sangha</b> establish a memorial garden or other outdoor place for contemplation and meditation.  |   | <b>X</b> |   |   |          |



**Indicators of Progress.** We will know we have met our stewardship goals when

**Goal 1** The Building Reserve Fund is at least 5% of the value of our total capital assets (buildings, furniture, fixtures, equipment).

**Goal 2** A financial plan has been developed to cover the costs of conducting a search and calling a new Minister.

**Goal 3** The **Minister** and the **Canvass campaign leaders** have established and sustained a pledge drive leadership system of recruiting team leaders for staggered two-year terms.

**Goal 4** There is a continuing process of encouraging legacy giving. CVUUS has developed a legacy giving toolkit for its members and friends.

**Goal 5** We can demonstrate ways in which we have maintained existing structures and land while reducing our carbon footprint.

**Goal 6** There are Improved sound systems for the sanctuary and the Ann Ross Fellowship Hall.

**Goal 7** Technological and video capabilities to facilitate remote participation for worship and other CVUUS activities are meeting our needs and providing value to the wider community.

**Goal 8** The Fenn House task force is formed and is generating ideas for congregational input. The task force takes into consideration strengthening our commitment to a Green Sanctuary, accessibility, meeting the needs of the community and being a good neighbor.

## Theme Area IV. Sustaining and Expanding Spiritual Growth for All Age Groups

**Purpose.** We plan to sustain and expand spiritual growth for all ages by

- Providing opportunities for children, youth, and adults to learn about and explore their own beliefs and values,
- Teaching the UU Principles,
- Valuing each individual person and ensuring that they are seen, heard, and loved,
- Working against racism and other oppressions,
- Growing our adult Religious Exploration offerings, and
- Supporting each other in our work for environmental action and climate justice.

**Goals.** We aspire to

1. Rebuild and strengthen as we adjust to changes in public health conditions.
2. Adopt the 8th UU Principle in the Religious Exploration program and work to get the congregation to adopt it as well.
3. Emphasize and retain Religious Exploration programming that is working, and build on that success to enhance offerings for children, youth, and young adults.
4. Expand programming for adults.
5. Include environmental and climate-centered programming for all ages.

| Action Steps  | 2021-22 | 2022-23 | 2023-24 | 2024-25 | 2025-26 |
|---|---------|---------|---------|---------|---------|
| <b>1.1</b> The <b>RE Council</b> works with the RE Director to increase the number of people on the Council.  | X       |         |         |         |         |
| <b>1.2</b> The <b>RE Council</b> works with the interim <b>minister</b> to plan for the RE Director's sabbatical in 2025.   |         |         |         | X       |         |
| <b>1.3</b> The <b>RE Director</b> works with the <b>Office Manager</b> and the <b>Facilities</b> and <b>Safe Congregations Teams</b> to update hygiene and health protocols in spaces and in programming. | X       |         |         |         |         |
| <b>2.1</b> The <b>RE Council</b> conducts an anti-racism/oppression audit of the RE program.  | X       | X       |         |         |         |
| <b>3.1</b> The <b>RE Council</b> reviews all OWL offerings.   | X       | (X)     |         |         |         |
| <b>3.2</b> The <b>RE Council</b> , in consultation with the <b>Facilities Committee</b> , develops a plan to accommodate the physical space needed for our RE program.                                    | X       | X       |         |         |         |

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| <b>3.3</b> The <b>RE Council</b> and the <b>Minister</b> explore expanding the DRE position to ¾-time or full-time, with additional responsibilities to include adult RE.                       |   | X | X |   |   |
| <b>4.1</b> The <b>RE Council</b> and the <b>Fellowship Ministry</b> keep each other informed of offerings for adults to encourage cross-fertilization and avoid working at cross-purposes.      | X | X | X | X | X |
| <b>5.1</b> The <b>RE Council</b> works with the <b>Social Justice Action Team</b> to evaluate environmental and climate-centered curricula for possible inclusion in our programs for all ages. |   | X | X |   |   |

**Indicators of Progress.** We will know we have met our spiritual growth goals when

**Goal 1** The RE Council has 5-6 active members and robust succession planning.

**Goal 2** The RE program has adopted the 8th Principle, and the congregation has explored and voted on whether to follow suit.

**Goal 3** The RE Council and the Minister have explored expansion of the DRE position, and the Minister has decided whether to add more hours to the DRE's weekly schedule.

**Goal 4** There is a rich slate of RE experiences available to adults, coordinated by the DRE or the Fellowship ministry as appropriate to the DRE's availability.

**Goal 5** Congregants of all ages have been challenged and inspired by RE classes to work for environmental action and climate justice.

## APPENDIX

### 1. Useful Information About CVUUS as an Organization

The Board of Trustees sets policy for the congregation and is elected by the members. The Board conducts its business using policy governance, which allows it to focus on the big picture.

The Council of Ministries is made up of representatives from all of the CVUUS ministries and teams. Its goals are to

- Create, coordinate, and sustain opportunities for connection within the congregation;
- Ensure that ministries are making progress toward CVUUS's long range and annual goals;
- Provide feedback to minister;
- Develop leaders.

The Leadership Council consists of the Board President and Vice-President, the two co-leaders of the Council of Ministries, and the minister. Its primary task is to coordinate and facilitate communication and collaboration among the Minister, the Board, and the Council.

### 2. More Details Related to Specific Parts of the Plan

#### Theme Area III

The current estimated value of our assets is approximately 3 million dollars. Therefore, our financial goal is to have a balance of \$150,000 in the building reserve funds. As of June 30, 2021, that balance was \$118,459.

CVUUS endowments include the Building Reserve Fund, General Endowment Fund, and any Special Purpose Fund that might be established. The goal of raising awareness includes providing opportunities for the congregation to learn about financial and estate planning, and to educate the congregation of the importance of financial stability to meet our broader mission.

#### Theme Area IV

For information on the 8th principle, see <https://www.8thprincipleuu.org/>

The anti-racism/anti-oppression audit would include curriculum, books, visuals, videos, and toys. It would involve RE Council members, RE leaders, and assistants.

Possible changes to our OWL offerings include moving OWL from grades 5-6 to grades 4-5 and adding the OWL for older adults curriculum.

For information on existing climate-focused curricula, see <https://www.uumfe.org/resources/our-place-in-the-web-of-life-curriculum/> and <https://www.uua.org/environment/climate/curriculum>

### **3. Timeline of Long-Range Plan Development**

|                            |   |
|----------------------------|---|
| 2019-2020                  | The Board contacts teams and ministries to ask how the 2015 plan looks in retrospect. In particular, we ask what progress had been made toward the 2015 goals, and whether any of those goals no longer seem important or relevant. |
| November 2020              | The Board hosts a Congregational Conversation via Zoom, hearing from a variety of congregants about their hopes for CVUUS.  |
| December 2020 - April 2021 | The Board looks at the ideas and concerns that emerged from conversations with congregants and lay leaders, decides on the four theme areas, and sketches out goals and action steps for each.                                      |
| May - June 2021            | The Board goes back to teams and committees for feedback on what we have so far.  |
| June 2021                  | The Board presents its work to date at the CVUUS Annual Meeting and invites input from the congregation as a whole.   |
| July - September 2021      | The Board refines the plan into a complete draft.   |
| September 2021             | The Board reaches out to the Council of Ministries for another round of comments.   |
| October - November 2021    | The Board makes final edits.  |
| December 2021              | The Board presents the final version of the plan to the congregation.   |