



Strengthening the Church We Love

A Strategic Plan
for Thomas Jefferson Memorial Church
Unitarian-Universalist

Charlottesville, Virginia

PROGRESS REVIEW
April, 2016

Key

Not Started
Initial Steps
Some Progress
Good Progress
Complete - Ongoing
Task Complete

GOAL 1: Expanding and Deepening Our Spiritual Life

Objective	Initiatives	Progress Commentary	Outcome Measures
A. Continue to deepen and expand the spiritual connections of the Sunday morning experience	<p>A1. Establish a program of periodic pulpit exchanges.</p> <p>A2. Conduct post-Sunday-service discussions.</p> <p>A3. Design and implement a periodic survey for immediate feedback on various components of worship.</p> <p>A4. Continue annual pulse survey to assess and evaluate trends in the quality of spiritual and community connection.</p> <p>A5. Increase diversity of outside musicians and speakers.</p> <p>A6. Improve use of technology in service to increase connection.</p> <p>A7. Task Staff to explore / experiment with a model that allows Adult Faith Development (AFD) / RE / Worship to all be conducted on Sunday.</p> <p>A8. Support annual goals and recommendations by Lead Minister, Director of Music, Director of Religious Education, and Committee on Ministries to achieve objective.</p>	<p>A1. Beginning stages established with Reverend Bates</p> <p>A2. See also A7, some progress</p> <p>A3. Pulse Survey includes section on Sunday service worship elements</p> <p>A4. Pulse Survey Committee recruited</p> <p>Pulse Survey prepared and deployed in Spring, 2015. Pulse Survey comments shared with Board, Committee on Ministry and Triune Staff Members. Follow up planned for subsequent years.</p> <p>A6. Technology upgrades in the works for lower hall, including upgraded wifi.</p> <p>A7. See also A2. New Sunday morning offerings in spring 2016 - UUism, and Soul Matters Circle</p>	<p>X% of congregation/attendees who report spiritual connection at Sunday Service via pulse survey.</p> <p>Evaluation of attendance trends:</p> <ul style="list-style-type: none"> - X% increase/ decrease over time. - Attendance figures related to guest speakers and pulpit exchanges. - Attendance related to changes supporting goal 1A. <p>A7. Report(s) to the Board with recommendations and evaluation of any changes.</p> <p>A8. Annual Report to the Board of recommendations and evaluation of any changes.</p>
B. Continue to expand spiritual life beyond Sunday mornings	<p>B1. Explore a monthly evening service.</p> <p>B2. Better publicize and increase support for Covenant Groups/Small Group ministries.</p> <p>B3. Continue and strengthen programs that encourage children and youth to continue through RE programs.</p> <p>B4. Task the Committee on Ministries to study further and provide additional strategies for deepening spiritual connections and helping congregants to experience their Unitarian Universalism as a "full week faith."</p> <p>B5. Review AFD effectiveness and focus.</p>	<p>B1. Wednesday worship happening, but has 4-11 participants per week</p> <p>B1. Established weekly Wednesday Daytime Labyrinth service</p> <p>B2. Increased inclusion about Covenant Group program in sermons and joys and sorrows. Added support for new "soul matters circle". Identified as Staff Priority.</p> <p>B4. COM taking holistic look at church and identifying clear ministry areas and exploring each in depth.</p> <p>B5. Staff review underway. New AFD strategies are identified as a staff priority. See also A2.</p>	<p>B1. X% of respondents in periodic surveys who would like an evening service.</p> <p>B2. # and X% participation in Adult Faith Development (AFD), covenant groups, etc.</p> <p>B3. Evaluation of RE participation:</p> <ul style="list-style-type: none"> - % of children and youth in congregation participating in RE activities. - Attendance throughout year. - # and X% of RE children/youth that progress or continue through the RE programs as they grow. - Graduation from Coming of Age trends. <p>B4. Annual evaluation by Committee on Ministries, and DRE, cross referenced with Pulse Survey results.</p>
C. Deepen our connection with our place	<p>C1. Prominently display our beliefs and values in the Church building.</p> <p>C2. Provide a "map" or depiction of the Church campus and an explanation of the purpose of the building(s)/ features. (Coordinate with Initiative 3C1.)</p> <p>C3. More actively encourage the use of our grounds as a place for thought, solitude, discussion, meditation, etc.</p> <p>C4. More prominently display our connections to Charlottesville/Virginia and the history of our physical location and space.</p> <p>C5. Moderate congregational discussion on the appropriateness of the Jefferson name, legacy, and its impact on our community.</p>	<p>C1. Posters of UU values, strategic plan goals etc. Acts of witness include Black Lives Matter poster. Identified as a staff priority for 2015/16.</p> <p>C3. Wednesday labyrinth walks</p> <p>C5. Jefferson book collection in the Parlor</p> <p>Jefferson legacy posters in the foyer</p> <p>Handout with movie projects, discussion forums etc. outlined available in foyer</p> <p>Formation of Social Justice antiracism group to explore how to engage public witness process for antiracism work is under way.</p>	<p>C1. When accomplished.</p> <p>C2. When accomplished.</p> <p>C3. # of '+' comments on surveys.</p> <p>C4. When accomplished.</p> <p>C5. When accomplished.</p>
D. Strengthen the connection between social justice and our spiritual lives	<p>D1. Increase visibility (pulpit recognition on some regular basis) and support Young Adult Ministry and youth service projects (staff time).</p> <p>D2. Build a database that identifies special skills among the congregation that would effectively support Social Justice efforts and projects.</p> <p>D3. Continue support for Congregation-Based Community Organizing (i.e. IMPACT) and increase visibility of efforts amongst church community.</p> <p>D4. Task Social Justice Council to develop intentional programming to help congregants to identify their own social justice passion and ministry and coordinate effort and focus.</p>	<p>D1. Monthly spotlight on a Social Justice group during Sunday Worship service</p> <p>Commissioning ceremonies for groups/ leaders during Sunday Worship services</p> <p>D2. 'Yellow Pages' effort underway by DAF.</p> <p>D3. Worship Service focusing on IMPACT, April, 2015.</p> <p>D3. Continued Congregational Support for IMPACT supported in Board approved 2015 annual budget.</p>	<p>D2. # and X% increase in participation by youth and young adults.</p> <p>D3. When accomplished and in use.</p> <p>D4. Dollar impact and #'s of congregational participants.</p> <p>D5. # of Social Justice program participants and annual report.</p>

GOAL 2: Strengthening Our Connections

Objective	Initiatives	Progress Commentary	Outcome Measures
A. Establish Communications Task Force to improve internal communications (<i>how we communicate</i>) and evaluate external image and marketing (<i>what we communicate</i>) and make recommendations to the Board and congregation.	<p>A1. Board creates a charge for Communications Task Force.</p> <p>A2. Board appoints a Communications Task Force - 2 year appointment</p> <p>Proposed Year 1:</p> <ul style="list-style-type: none"> - Evaluate use of technology - Investigate funding for media/communications - Total redesign of website/social media/mobile - Prepare Communications Plan and budget - Make annual report to Board and congregation <p>Proposed Year 2:</p> <ul style="list-style-type: none"> - Implementation - Update projection capability in sanctuary - Increase strength of wireless signal throughout the church - Provide digital content or access in social hall or lobby - Make annual report to Board and congregation 	<p>A1. Created Charge</p> <p>A2. Recruited Communications Task Force members (2 year terms).</p> <p>Task Force underway and preparing report and recommendations to the Board.</p> <p>A2. Church website updated and Launched - Note: Board needs to understand any other outcomes of Task Force work and remaining tasks before disbanding.</p>	<p>A1. Task Force creation and congregational involvement.</p> <ul style="list-style-type: none"> - Engage X% of congregation for plan feedback. Web analytics: - Increase web hits by X%. - X% of congregation signed up for weekly and monthly updates. - X# increase in social media friends/followers. <p>A2. X% of objectives from Task Force implemented.</p> <p>Pulse survey results:</p> <ul style="list-style-type: none"> - X% rate TJMC communication as good or better.
B. Establish Governance Task Force to analyze current governance structures and processes and make recommendations to the Board and congregation.	<p>B1. Board creates a charge for Governance Task Force.</p> <p>B2. Board appoints a Governance Task Force – 9 month appointment.</p> <p>Proposed 9 month charge :</p> <ul style="list-style-type: none"> - Prepare report and recommendations that: <ul style="list-style-type: none"> o Supports attention to staff, their tasks, roles o Establishes clear expectations for staff and revises job descriptions and evaluation guides as necessary o Establishes expectations for the Board in evaluating the efforts of staff o Analyzes council structure and alternatives o Encourages transparent processes o Clearly outlines responsibilities of Board, staff, and congregation for decision making o Supports the implementation of the new software platform for church staff o Establishes Board short-term spending policy and transparency o Establishes a leadership succession plan for elected committees. 	<p>B1. Governance Task Force Charge approved by the Board, Spring, 2015.</p> <p>B2. Governance Task Force recruited and appointed.</p> <p>B2. Bylaws Review Subgroup to recommend policy and bylaws changes as needed.</p> <p>Updated Staff letters of agreements, updated staff job descriptions, updated assessment tools and processes for staff</p> <p>Governance Task Force operational, has been soliciting feedback, and has requested further guidance from board.</p>	<p>Pulse survey results:</p> <ul style="list-style-type: none"> - X% rate TJMC governance as good or better. - X% rate TJMC governance as clear and understandable. - X% rate staff roles independently as good or better. <p>B2. X% of objectives from charge for task force implemented.</p> <p>X% rate trust in decision making by Board as good or better.</p>
C. Deepen denominational connection.	<p>C1. Promote regional and national gatherings from pulpit and through communication strategy.</p> <p>C2. Support youth conferences.</p> <p>C3. Support attendance at GA.</p> <p>C4. Serve as host for regional meetings.</p> <p>C5. Meet UUA giving guidelines target.</p> <p>C6. Support opportunities for reporting from staff from UU training and conferences.</p>	<p>C3. AFD Class offered this spring on General Assembly Ware Lecture</p> <p>AFD off site programming from GA offered at TJMC and publicized ahead of time</p> <p>Publicized openings for GA delegates</p> <p>C4. Continue to serve as periodic host for VACUUM</p> <p>C5. Has been present in annual budget discussions and remains a goal.</p> <p>C6. CR - Blue Ridge Cluster Spring Leadership development Workshop</p>	<p># of Events attended /# of attendees.</p> <p>X% of congregation participating in events.</p> <p>Pulse survey results:</p> <ul style="list-style-type: none"> - X% rate connection to UUA as good or better. - X% rate understanding of 7 principles as good or better. <p>C3. X% of GA paid for by TJMC for at least 5 roles (Lead Minister, DRE, one youth, two Board members).</p> <p>C4. # of meetings hosted.</p> <p>C5. X% of UUA giving guidelines met.</p>
D. Strengthen integration between RE families (including parents, youth and children) and the wider congregation.	<p>D1. Plan specific events at least quarterly to connect RE Families.</p> <p>D2. Investigate supports for families of RE school-age children and youth that allow them to engage in important conversations and events after services (i.e. scheduling, childcare, etc.).</p> <p>D3. Solicit feedback on best communication strategies for RE families.</p> <p>D4. Solicit feedback on important topics for RE families.</p> <p>D5. Solicit feedback on best communication strategies for AFD.</p> <p>D6. Solicit feedback on important topics for AFD.</p>	<p>D1. Events planned by RE committee: Holiday party, PJs and Pancakes combined with Pledge Drive, Bingo parties etc.</p> <p>Active involvement across age groups for Multigenerational Worship Services</p> <p>D2. See A2.</p> <p>D4. Currently conducting mid-year surveys with positive feedback</p> <p>D6. Tasks to be done by the Committee on Ministry (not DRE and RE committee)</p>	<p># / X% of instructors that are not RE parents.</p> <p>RE Evaluations:</p> <ul style="list-style-type: none"> - X% rating content as good or better. - X% rating instructors as good or better. - X% rating RE leadership as good or better. <p>AFD Evaluations:</p> <ul style="list-style-type: none"> - X% rating content as good or better. - X% rating instructors as good or better. - X% rating RE leadership as good or better.
E. Deepen Congregational connections.	<p>E1. Task appropriate councils and committees with plan for in-reach activities to:</p> <ul style="list-style-type: none"> - Enhance connections within church - Recommend schedule for social opportunities for congregation - Encourage covenant group and other fellowship activities - Follow communication strategy laid out by task force. <p>E2. Create Social Action Collection selection guidelines. Consideration should be explored for organizations with higher #s of congregational participation.</p> <p>E3. Complete and implement a Disaster Preparedness Plan and communicate to the congregation.</p>	<p>E3. Completed and communicated through Congregational Conversations, Dec. 2015</p>	<p>Pulse survey results:</p> <ul style="list-style-type: none"> - X% rate engagement with TJMC as good or better. - X% rate social opportunities at TJMC as good or better. - X% rate the deepening of their relationships at TJMC during the last year as good or better. <p>E1. Event attendance:</p> <ul style="list-style-type: none"> - Engage X% of congregation in event. - X% Ratings of events from those in attendance of good or better. <p>E2. Measure of # of congregational participants in Social Action Collection organizations.</p>

GOAL 3: Stewarding Our Resources

Objective	Initiatives	Progress Commentary	Outcome Measures
A. Support and appreciate volunteers.	<p>A1. Create a volunteer coordination program to track, organize, and recognize volunteer effort. Evaluate range and type of volunteer hours to get a more holistic picture of TJMC volunteerism.</p> <p>A2. Develop measures for valuing volunteer efforts.</p> <p>A3. Recognize volunteers at Sunday worship service.</p> <p>A4. Conduct periodic commissioning services for specific contributions to community life (i.e. Pastoral Care, Worship Weavers, Committee on Ministries, CareNet).</p>	<p>A1. 'Yellow Pages' effort underway that may also serve to support this objective.</p> <p>A4. Commissioning of Pastoral Visitors, RE Teachers, Worship Weavers, Pledge Drive Chair has been part of a worship service this year. New Member recognition ceremonies happen twice a year. Child dedication service in December by Ministers, Worship Weavers, Council Chairs & Vice President</p> <p>Board has been practicing appreciative communications during meeting breaks.</p>	<p># of volunteers.</p> <p># of volunteer hours.</p> <p>Volunteer satisfaction survey.</p> <p>A3. # of worship services including a volunteer recognition.</p> <p>A4. # of commissioning services.</p>
B. Renovate existing facilities to maximize functionality and accessibility.	<p>B1. Complete renovation of the Lower Hall.</p> <p>B2. Prepare a plan to deal with the maintenance and financial implications of an aging HVAC system, including identification of costs and budget schedule.</p> <p>B3. Improve finishes and aesthetics of Main Building and Lower Hall.</p> <p>B4. Complete stabilization and improvements to Summit House.</p> <p>B5. Upgrade existing parking lot to currently submitted site plan.</p> <p>B6. Develop and implement a Campus Maintenance Plan that clearly defines responsible parties, process, and annual budget.</p>	<p>B1-4. Lower Hall and Summit House projects complete.</p> <p>B6. Buildings and Grounds Maintenance team making progress and developing plan</p>	<p>Renovations completed on budget and within reasonable time frame.</p>
C. Engage the congregation to create cohesive campus plan to guide future grounds decisions.	<p>C1. Prepare a Grounds Master Plan.</p> <p>C2. Prepare a Parking Plan.</p> <p>C3. Create plans for upgrading playground and explore establishing a space for youth. (Coordinate with initiative 3C1.)</p> <p>C4. Develop future Capital Plan.</p>	<p>C2. Conversations w/ City conducted by Dan Grogan regarding parking on adjacent streets.</p>	<p>C1. Engagement of congregation and preparation of a guiding Grounds Master Plan.</p> <p>C1. Completion of Grounds Master Plan.</p> <p>C2. Completion of Parking Plan.</p> <p>C3. Congregation-wide Ice Cream Social in a completed playground.</p>
D. Cultivate a culture of spiritual generosity.	<p>D1. Establish implementation steps for the UUA FORTH Plan.</p> <p>D2. Improve stewardship levels.</p> <p>D3. Implement donor recognition and appreciation.</p> <p>D4. Create structure to sustain annual canvass volunteer effort.</p>	<p>D1. Proposal has been made to strike this Initiative, as the Forth Plan is no longer the recommended vehicle to achieve the goal. A annual canvass structure has been established with the larger stewardship goal in mind.</p>	<p>D1. Implementation steps established for FORTH plan.</p> <p>D2. 100% of congregation has fair share gift of record.</p> <p>D2. Average fair share gift.</p> <p>D2. Donor distribution targets.</p> <p>D4. X% of canvass volunteers rating canvass experience as good or better.</p>
E. Establish a responsible, balanced budget that achieves congregational values and responsibilities.	<p>E1. Convene Budget Working Group.</p> <p>E2. Engage congregation in the budget development process.</p> <p>E3. Review and re-evaluate staffing task force recommendations and fund adapted plan fully.</p>	<p>E1. In progress</p> <p>E2. Program budget developed</p>	<p>Balanced budget.</p> <p>Restore 'fair share' UUA dues.</p> <p>E3. Full funding of reviewed staffing plan.</p>
F. Ensure fiscal responsibility and transparency.	<p>F1. Clarify role and function of Endowment Committee.</p> <p>F2. Transfer general endowment to UUA Common Endowment.</p> <p>F3. Improve fiscal transparency to the congregation and establish fiscal health metrics.</p> <p>F4. Clarify the role of the TJMC Board to make short term financial decisions (follow up on the spending limit initiative), (coordinate w/ Initiative 2B2 (Goal 2, Objective B, Initiative 2)).</p>	<p>F2. \$200,000 of the general endowment fund has been transferred to the UUA Common Endowment</p>	<p>F1. As completed.</p> <p>F2. As completed.</p> <p>F3. Regular reporting of financial information to the congregation.</p> <p>F3. Pulse survey - X% rating transparency as good or better.</p> <p>F3. Reserves replenished to an identified target.</p>