
UNITARIAN SOCIETY OF SANTA BARBARA



**Unitarian
Society**
of
Santa Barbara

STRATEGIC PLAN

June 4 2005

**Prepared By
Strategic Planning Task Group**

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Table of Contents

| | |
|---|----|
| Table of Contents | 1 |
| List of Acronyms | 2 |
| 1. Executive Summary | 3 |
| 2. Introduction | 5 |
| 3. Vision and Mission Statements | 7 |
| 4. Our Approach to Planning | 8 |
| 5. Key Assumptions | 10 |
| 6. Identifying Our Priorities | 13 |
| 7. Action Plan | 15 |
| 7.1 Worship, Ministry and Music | 16 |
| 7.2 Lifespan Religious Education | 18 |
| 7.3 Social Justice and Community Outreach | 22 |
| 7.4 Membership and Pastoral Care | 25 |
| 7.5 Governance | 28 |
| 7.6 UUA Denominational Support | 28 |
| 7.7 Staffing | 29 |
| 7.8 Facilities | 32 |
| 8. Financial Resources | 33 |
| 9. Implementation | 35 |
| 10. Reference Documents | 36 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

List of Acronyms

| | |
|---------|--------------------------------|
| Admin | Administrator |
| ARE | Adult Religious Education |
| Coord | Coordinator |
| CRE | Children's Religious Education |
| Fac Mgr | Facilities Manager |
| FC | Facilities |
| FN | Finances |
| MB | Membership |
| MC | Membership Committee |
| MT | Ministerial Team |
| OWL | Our Whole Lives |
| PC | Pastoral Care |
| RE | Religious Education |
| SJ | Social Justice |
| ST | Staffing |
| UU | Unitarian Universalist |
| WM | Worship, Ministry and Music |

Unitarian Society of Santa Barbara 2005 Strategic Plan

1. Executive Summary

This comprehensive five-year Strategic Plan is intended to serve the Unitarian Society of Santa Barbara (USSB) from now through June 30, 2010. It describes our intentions and priorities as a congregation, to help us put into practice the ideas and ideals expressed in our Vision and Mission statements.

The raw material for this plan came from our members and friends through special Board meetings as well as whole congregation assessment and future visioning meetings, surveys, and focus groups held during the '04-'05 year. A Strategic Planning Task Group was formed to develop a plan for congregational approval. The Task Group drafted this plan for adoption in the Annual Meeting held June 12, 2005

The Strategic Plan includes a list of goals and “measurable steps” (or action items) that matter to this congregation. The plan prioritizes those goals and measurable steps, and it defines the resources needed (staffing, facilities and finances) to support those goals and measurable steps. Through the ongoing Strategic Planning process, we will have a system in place to balance our resources with what we wish to accomplish.

The plan includes 20 broad goals organized in a way that shows how they support our Vision and Mission statements. These goals are listed in the following page. We will make progress towards each goal by completing the measurable steps that are identified in the plan. This will provide a basis for measuring progress towards our goals over the next five years.

The Strategic Planning process has identified a few very high priority and “cross-cutting” issues that will require a great deal of our attention during the next five years. Notably, these include:

- To prepare for and accommodate many staff changes including Parish Minister, Director of Religious Education, Organist, and Children’s Choir Director;
- To address the deep backlog of deferred maintenance and upgrades to our facilities;
- To improve our financial soundness, establish adequate reserves, and exercise a discipline of fiscal responsibility;
- To restructure and revitalize our Membership Committee, and to stimulate an epidemic of friendship and connecting throughout the congregation;
- To revitalize our teen program and initiate college and young adult programs;
- To sustain our high quality music programs and intellectually stimulating worship services.

To accomplish these and our other goals over the next five years, we will need strong leadership in our staff and volunteer positions. In view of the pressing need for additional resources, the Strategic Plan identifies the need to launch a Capital Campaign, with planning targeted to begin in the 2005-2006 Fiscal Year.

Unitarian Society of Santa Barbara

2005 Strategic Plan

1. Worship, Ministry and Music

- Goal #1: To Provide a High Degree of Intellectual Stimulation in Worship Services
- Goal #2: To Continue with High Quality Music Programs

2. Religious Education

- Goal #3: To Offer a Full Range of Lifespan Religious Education Programs to Members and Children of All Ages
- Goal #4: To Sustain a Vibrant and Expanding Program of Children's Religious Education
- Goal #5: To Develop Strong, Vital, and Thriving RE Programs for Teen, College and Young Adult Age Groups
- Goal #6: To Build Communities of People Learning Together. To Offer Adult RE Programs that are Appealing to Members, that Serve to Build Relationships and Connections, and that Support Spiritual Growth and Understanding of UU Theology, History and Principles. Recognize the Strong Desire for Small Groups in Adult RE and Consider Ways to Incorporate this in our RE offerings

3. Social Justice and Community Outreach

- Goal #7: To Strive for Greater Participation in Social Justice Actions
- Goal #8: To Strive for Greater Participation in Social Justice Education Events
- Goal #9: To have USSB Better Known in the Community for Non-Partisan Local Leadership
- Goal #10: To have USSB Known for its Local Inter-Faith Activity

4. Membership and Pastoral Care

- Goal #11: To Restructure and Revitalize Membership Committee (MC) and Related Task Groups
- Goal #12: To Stimulate an Epidemic of Friendship and Connecting Throughout the Congregation
- Goal #13: To Sustain the Healthy, Informed, Diverse Growth of the Congregation
- Goal #14: To Care for Each Other: Greater Awareness of Need, Know How, and Participation

5. UUA Denominational Support

- Goal #15: To Support the UUA at the National Level and to Play a Leadership Role in UUA in PSWD

6. Governance

- Goal #16: To Revise the USSB By-laws.

7. Staffing

- Goal #17: To Successfully Transition to a New Ministerial Team
- Goal #18: To Consider Options for Staff Developments During the Next Five Years

8. Facilities

- Goal #19: To Provide Facilities that are Functional, Attractive and Well-Maintained

8. Financial Resources

- Goal #20: To Secure Adequate Revenue to Support our Routine Operational Budget Needs and the Growing Scope of Our Programs

Unitarian Society of Santa Barbara 2005 Strategic Plan

2. Introduction

"What is this Document and Why is it Important?"

This comprehensive five-year Strategic Plan is intended to serve the Unitarian Society of Santa Barbara (USSB) from now through June 30, 2010. It describes our intentions and priorities as a congregation, to help us put the ideas and ideals expressed in our Vision and Mission statements into practice.

The practical value of such a plan was established in work done by our predecessors to set congregation directions, and craft a vision statement in 2000-2001. More specific goals were articulated during 2001-2002 by the Long Range Planning Committee. About eighty percent of the goals articulated by that group were accomplished by late 2004.

The raw material for the new plan came from our members and friends through special Board meetings as well as whole congregation assessment and future visioning meetings, surveys, and focus groups held during the '04-'05 year. The facilitators of focus groups drafted the Vision and Mission statements adopted by the congregation January 23, 2005 (Section 3.)

The Board compiled a list of goals and objectives for the future from the meetings and formed the Strategic Planning Task Group to develop a plan for congregational approval. The charge given to the Task Group was as follows:

Charge

"The Planning Task Group will build upon the outcomes of the Assessment and Searching for the Future weekends to identify the scope, process and outcomes for a comprehensive plan for USSB for the period of time from July 1, 2005 through June 30, 2010. The group shall propose a Strategic Plan for adoption by the congregation at the June Annual Meeting."

Scope –

- Prepare Strategic Plan for adoption by the congregation at June annual meeting
- Suggest priorities for period of time from July 1, 2005 – June 30, 2010
- Determine timing and resource impact (programs and services – who will do what by when)
- Start with the 150 "objectives" gathered during the Focus Groups, and add to them
- Select highest priority goals

Process

- Involve all aspects of congregation - stakeholders from clusters and affinity groups
- Communicate progress
- Request input - include some open meetings for discussion with the congregation

Outcomes

- Define outcomes for each defined goal (e.g. for growth, seek consensus on what it is and what we want)
- Agree on a small number of goals and their respective priorities
- Define "SMART" steps for each goal (specific, measurable, achievable, realistic and time-based) especially timing, cost estimates, and responsibility
- Present possible services and programs that could fulfill these goals
- Prioritize those services and programs

Unitarian Society of Santa Barbara 2005 Strategic Plan

- Evaluate resource needs and responsibilities - who is responsible; what level of effort; what money
- Multi-year draft plan for initial presentation at Board and Program Council
- Select a few areas for special focus each year
- Strategic Plan with three major components:
 - ❖ Five-Year Schedule of Programs and Services
 - ❖ Projected Staffing Plan
 - ❖ Proposed Program Council Structure.

The Task Group created a written survey and held additional focus groups to learn the priorities of the congregation, then drafted the plan, which was refined for adoption at the Annual Meeting held June 12, 2005.

Meeting reports, minutes, lists of goals, and survey results from the many planning activities are not provided here, but these working documents are mostly available on the USSB website or from the USSB Administration Office.

This plan is intended to be a working document to be used, interpreted, and revised as future operational groups of the congregation do their best to put it into practice.

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

3. Vision and Mission Statements

“Where Do We Want to Be in Five Years from Now?”

Our Vision:

We are an open and welcoming diverse religious community. We stimulate personal and spiritual growth, living lives of care and compassion. We work for a better world by speaking and living our values. We celebrate all life and the beauty of the world we share.

Our Mission:

- To inspire through meaningful worship, music & other programming
- To offer religious education for all ages
- To care for one another
- To promote peace, justice & understanding
- To invite others to share our tradition of social action and freedom of worship
- To engage in the larger Unitarian Universalist movement

- USSB Vision and Mission Statements, adopted January 23, 2005

Unitarian Society of Santa Barbara 2005 Strategic Plan

4. Our Approach to Planning

“How Do We Achieve Our Vision?”

The organization model below is a visual way of showing that the Vision is enabled by executing our Mission. The Mission Statement defines the programs we have chosen to implement at USSB. The focus of the Strategic Planning process is to identify the goals and measurable steps that will help us achieve our Mission.

To a large extent, the Mission Statement mirrors the “four pillars” we often refer to – Worship, Religious Education, Pastoral Care, and Social Justice. We recognize that the Mission Statement includes other important elements such as inviting others to join us, and engaging in the larger UU movement. There are also other programs we support that don’t fit naturally under these “labels”. In general, however, the Mission Statement provides a framework for organizing the goals and measurable steps for our Strategic Plan.

To support this organization, the pyramid shows that we need resources - staff services, facilities, and finances. For planning purposes, we have identified the goals that matter to this congregation; we have prioritized those goals and measurable steps; and we have assessed of the resources needed to support them. Through the Strategic Planning process, we will have a system in place to help balance our resources with what we wish to accomplish.



Unitarian Society of Santa Barbara 2005 Strategic Plan

The Strategic Planning Task Group began work in January 2005. Much of the material used to develop our goals and measurable steps was already available – from previous planning efforts and from the Searching for the Future Workshop that took place in December 2004. In March and April 2004, we developed and implemented a survey for the congregation. The survey included a wide range of goals and actions, which the congregation was asked to evaluate. The feedback provided valuable information for the Strategic Planning Task Group to begin the work of collating and prioritizing goals for the next five-years.

Once the goals and objectives were prioritized, the next steps were to identify the resources needed to move ahead with the highest priority items, to establish an implementation schedule, and to set the measures for success. A series of Focus Groups were arranged in May 2004 to confirm the results of the survey, and to gain further input from the congregation on the prioritization process. The Task Group also reviewed the goals and objectives as a whole to identify the “cross-cutting” themes that were emerging from the information gathered from the congregation.

Unitarian Society of Santa Barbara 2005 Strategic Plan

5. Key Assumptions

Organizational planning efforts must necessarily begin with assumptions, some of which may prove to frame or permeate many aspects of the resulting plan. In this context, “assumption” refers to that which is taken as true without proof. This section is devoted to describing the key assumptions that the Strategic Planning Task Group accepted during the plan’s assembly. While these assumptions are by definition not proven, there do appear to exist sufficient evidence, agreement, and/or rationale for their acceptance.

One important source for some of the assumptions below that concern growth is our Minister’s white paper entitled “Models of Different Size Churches”, which is available on the USSB web site at <http://www.ussb.org/ModelsOfDifferentSizeChurches.html>.

Here, then, is the list of assumptions used in the preparation of this plan:

- Planning flows from the *congregation’s* resources and goals, and the goals support our Four Pillars. “Congregation” is emphasized so as to highlight that it is not staff, minister, nor Board that sets these goals.
- We are growing steadily, and must plan for and embrace this growth.
- For planning purposes, a strict count of members is not sufficient. A more encompassing number is needed. We consider the “number served” to be the critical parameter, and we define this as the sum of our members, pledging friends, and RE families – about 700 souls as of April 2005.
- Our facility as currently configured has a maximum number of participants for any single service or event. That maximum is bounded by the capacity of our sanctuary, Parish Hall, RE classroom space, and parking (or lack thereof).
- We will not relocate to another facility during the timeframe of this plan – although we do not preclude any sort of remodel or reconstruction. This assumption is based on the analysis of growth summarized below.
- UUA studies show that once a sanctuary regularly hits 80% of maximum capacity for scheduled services at worship services or RE classes, we will likely stop growing. That is why we moved to two worship services except during summer months. Put another way, that means that as we grow we must plan to schedule multiple services and RE sessions to keep each usage of our facilities at or below 80% capacity, or risk implicitly turning away (or turning off) some of our existing and potential future members. We have already recognized this rule by adding our second worship service.

As stated in the 2001 Long Range Plan:

“Everyone wonders about growth. Our plans and proposed programs will result in growth. While no one knows if the present increase in members will continue at the same rate, we expect that growth will continue and within the next three to five years, our membership will increase from current membership of 450 to 700.

Such an increase will return us to membership levels achieved in 1985, so there is no question that this is a realistic level. It might even be too low. We know how to accommodate numbers of

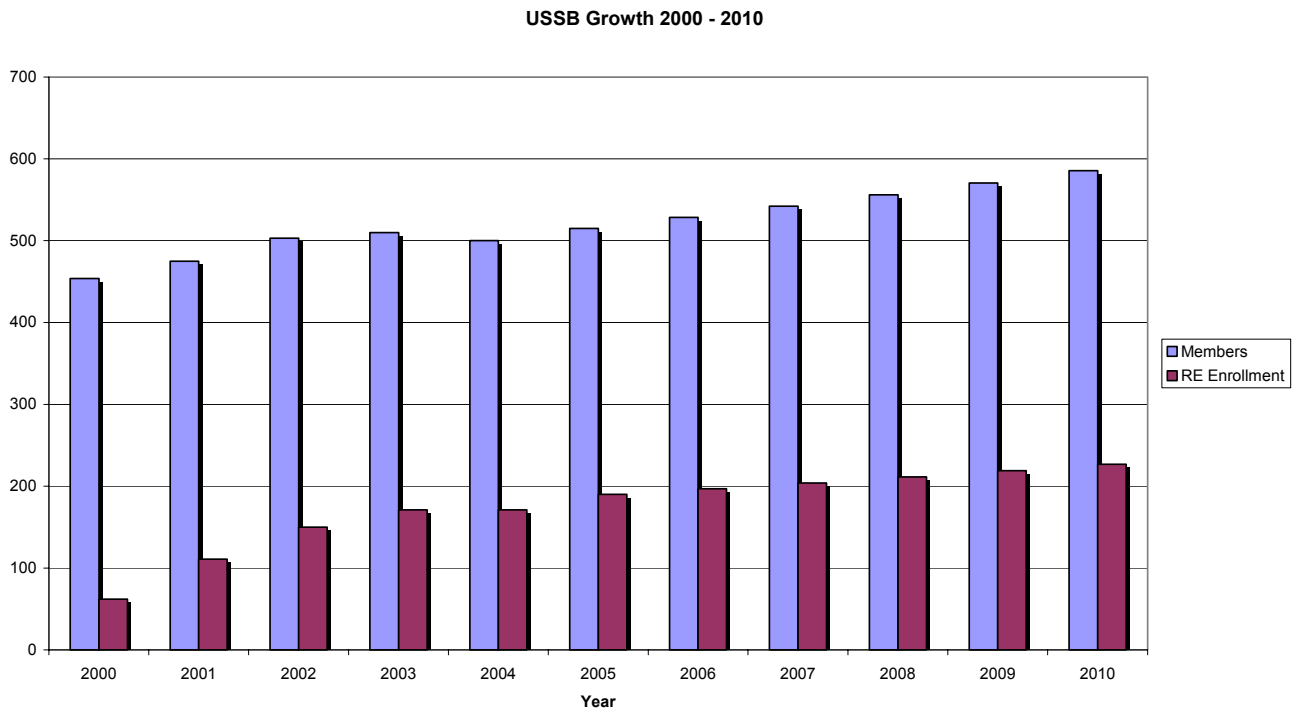
Unitarian Society of Santa Barbara 2005 Strategic Plan

this size and more importantly we know that the number itself is not the goal, but rather this increase will be the result of an enlivened and vital society.

The membership needs and deserves a society that is healthy, alive and offers a broad range of opportunities for individuals to enrich their spiritual growth. Some have called this a "seven-day-church" program. Our success and strength will come from the members, and our planning must find ways to nurture and promote the creative commitment of a wide diversity of individuals."

While the numbers are not the same today, the same arguments about growth and accommodating growth are relevant and applicable for the 2005 Strategic Plan.

In further considering a few of the issues surrounding growth, the chart below may prove useful. It describes our past five years growth in membership and RE enrollment, and projects our next five years.



Here we assume an annual membership growth rate of 2.6% (based on our past five years), and an annual RE enrollment growth rate of 3.6% (based on the past three years). It is important to note that the five-year growth rate for our RE program was 300% -- a truly astounding number. However, the three-year growth rate was used for these projections since recent growth has tapered off, likely due partly to the 80% rule. A new first-service RE program is in the works to address this (see Goal #4 below).

Regarding worship space, our sanctuary capacity is 289, including the balcony. Applying the 80% rule, once we regularly have 231 in the sanctuary for any one service, we must begin to examine alternatives. At current growth and attendance rates, we should not have to address this problem until sometime in 2012. Staff office space is another important component of growth. It will be addressed once staffing needs are solidified. See Goals #17 and #18, below.

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

6. Identifying Our Priorities

“What Are Our Highest Priorities for the Next Five Years?”

During FY 2004-2005, USSB sought input and feedback from members to help identify what our goals should be for the next five years, and what our priorities are. The “Searching for the Future” workshop held in December 2004 was used to obtain an extensive list of goals, and the Congregational Survey, administered in March-May 2005, was used to gather input on priorities. As follow-up to the survey, the Strategic Planning Task Group held a number of Focus Group meetings to obtain further input and clarification about our priorities.

The Congregational Survey showed that the satisfaction levels were high to very high across all four key “pillars” – (1) Worship, (2) Religious Education, (3) Social Justice/Outreach, and (4) Pastoral Care/Membership. The survey suggests that for the next five years, we want “more of the same” in these areas. We support growth, we want to increase ways to know each other personally, and we very strongly support the need to address the deferred maintenance of our facilities. There were very few additional write-in comments submitted with the survey.

Table 1 on the following page lists the goals and action items that were rated in the Congregational Survey. The action items (in Column 1) are shown in terms of their ranked “score” in Column 2, and their “Category” (Column 3). The categories used were as follows:

| | |
|---------------------------------------|--------|
| Worship, Ministry and Music | WM |
| Religious Education | RE |
| Social Justice and Community Outreach | SJ |
| Membership and Pastoral Care | MB, PC |
| UU Denominational Support | UU |
| Staffing | ST |
| Facilities | FC |
| Financial Resources | FN |

Each “score” in the table is the sum of the percentages for “Highest Importance” and “More than Medium in Importance”. This is a convenient simple measure to help every reader see the relative priorities among highly rated goals and action items.

Statistical Notes – Scores above 40 are a rough indication of stronger than average importance. For example equal votes in each of the five categories from “not important” to “most important” would result in a score of 40. However, this crude measure does not work well to distinguish between medium versus low importance. For example a zero score would occur if everyone voted an item was of medium importance; but the same 0 score would occur if everyone voted an item was not important. Detailed results are available on request to Bruce Hanna.

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Table 1 Ranked List of Goals and Action Items

| Goals and Action Items | Score | Category |
|--|-------|----------|
| Sustain music in services at same or greater quality | 84 | MU |
| Facility's serious deferred maintenance issues are all addressed | 69 | FC |
| Small group activities for all members who want them | 68 | SH |
| Continue program of public concerts and recitals | 67 | MU |
| Build relationships and help us feel connected | 65 | RE |
| Vibrant children's RE program serves growing number of children | 64 | RE |
| Introduce community to UU values and attract good members | 61 | RE |
| USSB is known for non-partisan local political leadership | 60 | SJ |
| The congregation is much more diverse | 59 | MB |
| USSB is known for its local inter-faith activity | 58 | SJ |
| Committed mentors help new members assimilate | 57 | MB |
| More effective programs help visitors become members | 57 | MB |
| Vibrant youth group is a magnet to the community | 55 | RE |
| Current and anticipated staff have adequate office space | 55 | FC |
| Members regularly participate in SJ actions | 54 | SJ |
| Open men's, women's and couple's groups | 53 | SH |
| Our Pastoral Care network meets the needs of our members | 51 | PC |
| College-age and young adult programs thrive | 51 | RE |
| Social justice involvement is a key part of our CRE programs | 51 | RE |
| Campus has upgraded bathrooms for all users of facilities | 50 | FC |
| Support United Nations and legislative ministries | 50 | SJ |
| Regular church dinners with speaker & table discussion groups | 49 | SH |
| All programs and groups have ample attractive meeting space | 49 | FC |
| Busy inviting place support SJ events of USSB and community | 49 | FC |
| Members regularly participate in SJ education events | 49 | SJ |
| Greater awareness of membership privileges & responsibilities | 48 | MM |
| Are so appealing membership participate regularly | 47 | RE |
| USSB continues to fully support the UUA | 46 | UU |
| Membership continues to grow | 45 | MB |
| Increased number of members are specially trained in PC | 43 | PC |
| Many meet regularly in intimate dinner groupings - 4x4x4 et al | 42 | SH |
| USSB plays a leadership role in UUA on the west coast | 41 | UU |
| Encourage lay led programs | 39 | RE |
| Continue with folk and eclectic music at early service | 36 | MU |
| Parents' participation in CRE is a highlight of their life | 36 | RE |
| Express the diversity of USSB affinity/identity groups | 34 | RE |
| Senior Seekers Groups meet at major SB retirement complexes | 33 | RE |
| Pastoral Care support groups form and meet regularly | 33 | PC |
| Expand and improve hymn singing at services | 32 | MU |
| Buddy system helps assimilate young children and new families | 32 | RE |
| Many members meet in small group ministries | 31 | WM |
| Change style from classical to more varied in second service | 31 | MU |
| Memorial Garden made to offer a peaceful reflection place | 31 | FC |
| Sanctuary is upgraded to support a greater variety of events | 30 | FC |
| More members participate in worship (reflections, stories, etc) | 29 | WM |
| Involve many participants from the S.B. community each week | 28 | RE |
| Expand and improve children's music program | 25 | MU |
| Significant USSB attendance at cluster, district or GA meetings | 25 | UU |
| Two to three Sunday services in entirely different formats | 22 | WM |
| Expand number and types of choirs | 16 | MU |
| More frequent lay led services | 14 | WM |
| CRE classes for all ages meet twice each Sunday | 14 | RE |
| Multiple ministers provide worship services | 11 | WM |
| Opportunity to worship on a day other than Sun (mid-week) | 4 | WM |

Unitarian Society of Santa Barbara 2005 Strategic Plan

7. Action Plan

“How Will We Achieve Our Goals?”

This section includes a detailed summary of the actions that this Congregation will take in the next five years to implement the goals that have been identified. Separate sections are included with a limited number of broad goals organized to match our mission statement as follows:

Each goal is followed by a list of specific actions this Congregation will take to implement that goal. The action items are stated as measurable steps, with the perceived barriers, the measures of success, who does it, and by when. This will provide a basis for moving forward with each action item, and for measuring progress towards our goals over the next five years.

For each measurable step, the Strategic Planning Task Group has made it's best attempt to envision the barriers that we are likely face as we implement that step. We acknowledge that there may be other barriers that we encounter along the way. Similarly, the “Who Does It” column should not be thought of as absolutely definitive, but rather it is based upon the best wisdom of the Task Group at this point in time. We expect this plan will be reviewed and revised at least annually, so there will be opportunities to refine the barriers and assignment of responsibilities as time moves on.

The dates shown in the “By When” column could also change during the next five years, as we gain a better understanding of our how much time and effort each of the measurable steps will require. It will be the responsibility of the Board to review the actions assigned in any given year and make careful judgments about what our Congregation is capable of accomplishing in that year.

In many cases, the measurable steps are intended to initiate, enhance or revise programs that will carry the Society towards the stated goal. Once the programs are developed, many are then ongoing. From that point on, they become institutionalized, so from a planning perspective the measurable step is considered to be complete.

For some measurable steps, the “by when” column has an entry called “on-going”. For these items, on-going implies that the action has already been initiated, so the Strategic Plan recognizes the need to sustain these important initiatives. For this type of measurable step, the plan includes only those items that have been specifically called out by the members during the information-gathering workshops and focus groups. We recognize that there are many other important operational programs and events, not mentioned in this plan, that are needed to sustain the ongoing health of the congregation.

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

7.1 Worship, Ministry and Music

The survey and prior focus groups showed that the present worship and music programs are well received by the Congregation. Worship services with a high degree of intellectual stimulation and excellent musical content are of the highest importance. Preserving and expanding both are key goals for the next five years.

We recognize that the content of the services is the primary responsibility of the Minister and those on the Worship Committee who plan the lay led services. The music program is an important component of the worship services, and as such, must be coordinated with the Minister and Worship Committee members responsible for services. In addition, the music program now has a supporting role in many activities such as Chautauqua events, entertainment at gatherings and social programs. More recently, public concerts have grown in importance as an outreach to the broader community.

Goal #1: To Provide a High Degree of Intellectual Stimulation in Worship Services

| Measurable Steps | Barriers | Measure Of Success | Who does it? | By When? |
|---|--|--|---|--|
| 1. Incorporate the interest in intellectual stimulation into the content of the sermons and readings. | Having time and resources to achieve this goal | Satisfaction of the congregation as expressed to COSM (Committee on Shared Ministry) | Minister and Worship Committee | Ongoing |
| 2. Outside speaker series bringing scholars to the Society for symposia, lectures and Sunday service participation once per quarter | Need to establish a committee to select, support and coordinate these events | Creating a committee, providing funding, and presentation of programs | Worship Committee, Adult RE, Chautauqua | Organize committee, solicit funding in 2005, and begin presentation of quarterly program in 2006 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #2: To Continue with High Quality Music Programs

| Measurable Steps | Barriers | Measure Of Success | Who does it? | By When? |
|--|---|---|--|---|
| 1. Support all choirs to high standards | Qualified choir director, Recruiting qualified singers and funding | Growth and quality of choir repertoire | Choir/Music Director | Ongoing |
| 2. Maintaining the organ and Steinway piano to "concert performance" standards | Having the funds to continue repairs and upgrades as needed | Meeting the standards of concert pianists and organists | Administrator in consultation with the music professionals on the staff | Ongoing |
| 3. Continue having members who are musicians perform at worship services | Recruiting and promoting members to participate | Number and quality of participation | Music Director, Music Committee | Ongoing |
| 4. Maintain well-qualified choir director. | See Staffing Section | | | |
| 5. Well-qualified organist/accompanist on staff | See Staffing Section. | | | |
| 6. Continue with concerts and recitals for the public | Dependence on volunteers, efforts of Music Committee | Number and quality of public concerts | Presently, wholly dependent upon volunteer efforts, later Music Director | Program supported by a Music Director 2008-2010 |
| 7. Increasing number of members and community members who attend concerts and recitals | Overcoming difficulties in providing publicity of events, parking, timing, etc. | Increase in attendance | Presently, wholly dependent upon volunteer efforts, later Music Director | Program supported by a Music Director 2008-2010 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

7.2 Lifespan Religious Education

The Children’s Religious Education program has been growing. There is an evolving curriculum, and children and teachers are creating their own Small Group experiences. The Coming of Age Program and Junior and Senior High OWL (Our Whole Lives) continue to thrive and grow. With the children’s program, there is an ongoing need to integrate new families and support for long-time CRE families through personal contact.

A re-energized Adult RE committee is slowly building a sense of their role as visionaries for Adult Religious Education. They reflect on the topics for classes that make sense in our community and the ways in which we can integrate the educational needs of our members through collaboration with SB Adult Ed and other programs in Santa Barbara. Adult OWL, Chautauqua, the Parish Minister’s classes and the Film Series are examples of well-attended offerings.

We are experiencing ongoing difficulties with our teen program, our Campus Ministry and Young Adult programming. We have over 30 teens who have participated enthusiastically in Coming of Age and OWL who would be well served by an active, engaging high school program. The Congregational Survey identified this as one of our highest priorities. Experienced leadership is needed for these vital areas of our RE program.

Goal #3: To Offer a Full Range of Lifespan Religious Education Programs to Members and Children of All Ages.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|--|---|---|-----------------|
| 1. Coordinate LRE Program with Membership and Pastoral Care programs to ensure that offerings integrate new members and families and support long-time members. | “Tried Before” Need for sustained momentum | Positive feedback from RE attendees. Well attended classes | MT, Membership and PC Coordinator | Ongoing |
| 2. Continue to effectively publicize LRE programs, especially to new members. | Time and money; support to prepare appealing “copy” | LRE brochures Regular LRE features in USSB media | MT, Program Council | Ongoing |
| 3. Continue to include social justice in our LRE programs and curricula. | Very wide range to choose from | Awareness of Empowerment projects/ partners | DRE, SJ Coordinator | Ongoing |
| 4. Introduce UU Lifespan RE to the community and attract members. | Need to address our own USSB needs first | Ads in local media | DRE, Program Council | Jun 2008 |
| 5. Develop a LRE staff plan that addresses professional and voluntary staffing needs for all aspects of Lifespan RE – adult, college, teens and children. | See Staffing Section | | | |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #4: To Sustain a Vibrant and Expanding Program of Children's Religious Education.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|---|---|--------------------------------|-----------------|
| 1. Include children's education in UU history and principles annually. | Scheduling for consistency | Children of all ages are able to articulate what it is to be Unitarian | DRE/RE Asst, CRE Teachers | Ongoing |
| 2. Sustain and build upon our three-year rotation of Children's RE: (1) Judeo-Christian heritage, (2) world religions, and (3) myth and science. | Teacher training. | Rotation completes full three-year cycle. Feedback supports ongoing rotation. | DRE, CRE teachers and families | Ongoing |
| 3. Increase family participation and commitment to Children's RE. | Some parents may object to increased level of involvement | Parents and families are committed to CRE program. Children's attendance is more consistent. | DRE CRE Parents | Ongoing |
| 4. Provide two high quality Children's RE programs to match the two services. | Availability of teachers. Need more staff support. "Selling" it to families | Classes are taking place at both services. Families are excited about the classes at both times | DRE/RE Asst and members | 2005-2006 |
| 5. Increase participation level in children's choir. | Recruitment dependent on Children's Choir Director | Choir grows to 20+ regular singers | Children's Choir Director | 2006-2007 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #5: To Develop Strong, Vital, and Thriving RE Programs for Teen, College and Young Adult Age Groups.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|--|---|--|-----------------|
| 1. Maintain the strong commitment to COA and YRUU OWL Programs. | Training new facilitators | COA and OWL scheduled annually | DRE, COA and OWL facilitators | Ongoing |
| 2. Provide Teen programming that includes UU elements of Leadership, Education, Social Action, Worship, Community Building and Friendships. | Need people with time and skills to do this | A group that is meeting regularly | DRE, Youth facilitators, YRUU families | Sep 2006 |
| 3. Recruit "experts" from our congregation to help guide the teen groups on selected social and community service issues. | Finding the right "Experts" | At least one expert engaged each year | New Hire Which? | Sep 2006 |
| 4. Develop Campus Ministry and Young Adult programming around a core group of Young Adults and allies, through Small Group ministry, UU theology/history, and/or social justice components. | Need for staff and volunteers; identifying core groups | Core groups identified by name; staff and volunteers are in place | DRE, Young Adults, Program Council | 2007 |
| 5. Provide leadership to assist the teen group facilitation team, or to develop programs for college ages, or young adults. | See Staffing Section | | | |
| Good idea: Include outdoor adventures in the YRUU curriculum. | Need for detailed planning and supervision | At least one YRUU camping trip per year | Teen Facilitator | 2006-2007 |
| Good idea: Recruit UU college students to help run the teen programs. (Note UUA guideline: teen facilitators must be at least 25 years old) | Resources to conduct a successful recruiting program | At least three college students assisting | DRE | Sep 2007 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #6: To Build Communities of People Learning Together. To Offer Adult RE Programs that are Appealing to Members, that Serve to Build Relationships and Connections and that Support Spiritual Growth and Understanding of UU Theology, History and Principles. Recognize the Strong Desire for Small Groups in Adult RE and Consider Ways Incorporate this in our RE offerings.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|---|--|---|-----------------|
| 1. Continue to promote successful offerings such as Chautauqua, Adult OWL, Film Series, Minister's classes. | Volunteer facilitators, busy members | Classes or events are regularly scheduled | DRE, ARE teachers | Ongoing |
| 2. Continue to select one or two major subjects to focus on each year for five years, using the Small Group Ministry model. | Formal curriculum may be too restrictive for ARE | Written curriculum is developed | DRE, ARE Committee | Ongoing |
| 3. Continue to assess new class offerings and provide strong support for selected new classes. | Need to recruit Innovative teachers. Busy members | Process in place for assessing and promoting new class offerings | DRE, ARE Committee, Program Council | Ongoing |
| 4. Continue to monitor the level of participation in ARE classes. | | Class attendance data are compiled each year | DRE, Teachers, Administrator | Ongoing |
| 5. Develop a structured core curriculum covering UU history, theology and other topics of interest for members and those on the path to membership. | Training facilitators, encouraging members to sign up | Members and friends grow in understanding and living UU faith | DRE, Minister, ARE Committee and teachers | 2005-2006 |
| 6. Develop a Core Faculty for ARE trained in New UU, UU history, theology, other topics of interest, and small group facilitation. | Engaging busy people; attaining agreement on role of Faculty | Core Faculty are listed by name | DRE, ARE Committee | 2006-2007 |
| 7. Integrate our ARE program with other adult education programs in our community. Offer opportunities for social interaction before or after USSB and community classes. | Huge array of education offered in community. Need volunteer coordinators | Groups attend community classes and discuss experiences. | ARE Committee, DRE | 2005-2006 |

Unitarian Society of Santa Barbara 2005 Strategic Plan

7.3 Social Justice and Community Outreach

Input from participants in Vision and Mission workshops, as well as survey results, reflect the high level of importance our congregation places on efforts to advance social justice in Santa Barbara and the world at large. Many of us actively support programs in the greater community promoting social justice, independent of special projects adopted for sponsorship by the Unitarian Society. The presentations made during the selection process for the Empowerment Program have allowed some members to share their experience with the congregation. For those otherwise unable to participate in social justice actions, monetary contributions provide an important avenue of support for social justice activities.

Currently the Social Justice programs of the Society are being coordinated by a part-time paid Social Justice Coordinator. Through the Empowerment Program and designated plate collections, members of our congregation provide volunteer and financial support to seven nonprofits in the community. These are:

- Will Bridge of Santa Barbara: a mental health shelter for homeless men and women;
- Transition House: temporary housing and other services for homeless families;
- Domestic Violence Solutions: advocacy and action to reduce domestic violence;
- The Environmental Defense Center: legal, educational and advocacy for the protection of the environment;
- La Casa de la Raza: Eastside center providing Latinos educational and legal help;
- YMCA Foster Care Program: working to increase the number of foster care homes;
- The Santa Barbara Family Care Center: advocates for quality, accessible childcare.

In addition, four Task Forces coordinate Society volunteers in the following:

- Mobile Food Pantry: helps to distribute food to those in need;
- Community Kitchen: serving food at Casa Esperanza homeless shelter;
- Education task Force: works to supply reading tutors to a number of elementary schools.
- Health Care Task Force: works with larger Health Care for All organization to promote adequate health care system for all.

The recent survey responses reinforced the importance many members place on providing both volunteers and financial assistance to our Social Justice programs, a greater USSB role in interfaith activities, increased participation in education events applicable to social justice issues, UU Service Committee, and legislative ministries. These priorities are expressed in our goals and measurable steps outlined below.

Goal #7: To Strive for Greater Participation in Social Justice Actions.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--------------------------------------|-------------------|------------------------------|------------------------------------|-----------------|
| 1. Continue the Empowerment Program, | Lack of knowledge | Greater numbers Involved and | USSB members who sponsor agencies, | Ongoing |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|--|--|---|-----------------|
| selecting social service agencies for financial and other forms of support. | among members of opportunities to participate. | participating | working with Social Justice Coordinator | |
| 2. Provide a regular U-Mail/Kaleidoscope "Volunteer Opportunities" listing to get more people involved who want to be but don't know how. | Lack of standardized format for job descriptions | Social Justice Committee reports increased involvement | Coordinated by Social Justice Coordinator | 2005-2006 |
| 3. Assess the need for greater professional leadership in light of increased activities. | See Staff Section | | | |

| | | | | |
|--|--|--|----------------------------|-----------|
| Good idea: Form a "Co-Cook" relationship at Transition House and/or Community Kitchen with Live Oak and other local congregations. | Lack of coordination of food preparation teams | Prepare meals 6 times/year with 3-5 people cooking each time | Social Justice Coordinator | 2005-2006 |
|--|--|--|----------------------------|-----------|

Goal #8: To Strive for Greater Participation in Social Justice Education Events

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|---|--|---|-----------------|
| 1. Coordinate with Live Oak congregation on Social Justice events. | Lack of communication | Communication with Live Oak about a possible event | Social Justice Coordinator | 2005-2006 |
| 2. Publicize Chautauqua social justice presentations through special mailing to interested organizations/churches. | Identifying persons/skills to implement. Money | Increased exposure and attendance at Chautauqua performances | Chautauqua volunteers working with Social Justice Coordinator to help identify interested groups. | 2005-2006 |
| 3. Periodic forums and speakers on Social Justice issues to raise awareness/interest/involvement. "Listening Campaign" to elicit areas of interest in Congregation. | Unidentified leadership and skills to ensure success. Money | Well-attended twice yearly lectures on broad social justice issues | Facilities manager. Social Justice Coordinator, Adult RE, Chautauqua | 2006-2007 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #9: To have USSB Better Known in the Community for Non-Partisan Local Leadership

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--|---|--|---|-----------------|
| 1. Continue pilot program and evaluation of room use sponsorship for community Social Justice presentations. | Lack of knowledge and/or understanding of the existing pilot project. | Existing program utilized and evaluated. | Room Use Committee, Facilities Manager, Administrator | Ongoing |
| 2. Work with non-partisan groups, e.g., League of Women Voters, to co-sponsor candidate and ballot measure forums at USSB Parish Hall. | Lack of daytime Parking | Forums held regularly | Social Justice Coordinator | 2005- 2006 |

Goal #10: To have USSB Known for its Local Inter-Faith Activity

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|---|---|--|-----------------|
| 1. Coordinate with other congregations that have active social justice programs. | Lack of contact and working relationships | Established communications and relationships. | Parish minister, DRE, Social Justice Coordinator | 2005-2006 |
| Good idea: Build a bridge to the African American community by assisting a local church to undertake needed repairs to its facility-- a good way to reach out and form a possible alliance for future social justice joint project. | Time constraints; USSB facility needs | One Workday and one special collection | Building and Grounds Committee; Social Justice Coordinator | 2005-2006 |
| Good idea: Children's RE program works with another church RE program on a specific, mutually agreed upon project. | Lack of contact | One joint activity | DRE, Social Justice Coordinator | 2006-2007 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

7.4 Membership and Pastoral Care

Making and sustaining deep personal connections has become a challenge for many members and friends due to the large size of our congregation and membership turnover. Also many members feel that they are on the periphery vs. part of the “core group”, but seek to be known and to contribute fully to the programs of the congregation.

Addressing these issues will lead to a healthier more enjoyable membership experience, enable caring and asking for support (Pastoral Care), and help new, as well as long-term members assimilate and stay connected. Special attention will be placed on restructuring and revitalizing our Membership Committee (MC), in order to stimulate an epidemic of friendship and connecting throughout the congregation.

Goal #11: To Restructure and Revitalize Membership Committee and Related Task Groups

| Measurable Steps | Barriers | Measure of Success | Who does it? | By When? |
|---|--|--|--|-----------------|
| 1. Recruit one or more committed, involved members to lead Membership Committee | Tough to maintain volunteers for Membership Committee | Sustained leadership in Membership Committee | Board recruits and appoints chair; Chair leads and recruits rest | 2005-06 |
| 2. Redefine and develop Membership Committee and Programming. | Lack of creative planning, leaders in each area | Clarity of role, scope, and overlap for each | MC, Staff, ARE, PC coordinator plan and execute joint approach. | 2005-06 |
| 3. Recruit, train and place membership, PC volunteers. | Challenge to inform and recruit people | Adequate participation of trained volunteers | MC, PC Coord, Staff | 2005-06 |
| 4. Recruit a “professional” volunteer or paid volunteer coordinator. | See Staff Section. Budget if hired; finding the right person to give lots of time if a volunteer | Filling the position. Effective placement of volunteers. | Board, staff, lay leaders | 2008-09 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #12: To Stimulate an Epidemic of Friendship and Connecting Throughout the Congregation

| Measurable Steps | Barriers | Measure of Success | Who does it? | By When? |
|---|--|---|--|-----------------|
| 1. Offer year-round affinity and other small group activities beyond Lifespan RE, including, men's, women's, couples' groups. | Lack of committee, facilitators, Staff time | New small group programs beyond LRE, trained facilitators | Membership, ARE, Pastoral Care Coord, Staff, Program Council | 2005-06 |
| 2. Offer regular social activities for diverse groups. | Lack of volunteers | New events and sustaining those that people like | Program Council, Membership, Social Committee, Staff, ARE | 2005-06 |
| 3. Expand monthly connecting events before/after services, e.g., Souper Sunday. | Lack of interested volunteers | New events and sustaining those that people like | Membership, Staff, ARE, Program Council, Social Committee | 2005-06 |
| 4. Expand number and skills of event facilitatorss | Lack of interested volunteers; need for training | New volunteers, sustained involvement of many, regular fun trainings/yr | Membership Committee and staff | 2005-06 |

Goal #13: To Sustain the Healthy, Informed, Diverse Growth of the Congregation.

| Measurable Steps | Barriers | Measure of Success | Who does it? | By When? |
|--|---|---|--|-----------------|
| 1. Develop and sustain awareness and affirmation of "What membership means" | Knowledgeable creative person needs to write brochure | Publication is completed, distributed, and maintained | Membership and Staff | 2005-06 |
| 2. Expand member participation in path to membership | Lack of interested volunteers | Training is held and more members are recruited | Membership and Staff | 2005-06 |
| 3. Invite the SB area community to participate in services, events, and programs | Lack of volunteers; reluctance to proselytize; money | Greater participation; changed member patterns; PR in local media | Membership, Staff, LRE | 2005-06 |
| Good idea: Hold "invite a friend" weekends twice a year including special services, concerts, activities | Reluctance of most members to "proselytize" | Greater participation, Congregational expectation that we do this | Min, MC, Congregation, Worship Committee | 2006-07 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #14: To Care For Each Other: Greater Awareness of Need, Know-How, and Participation.

| Measurable Steps | Barriers | Measure of Success | Who does it? | By When? |
|--|---|---|--|----------------------|
| 1. Pastoral Care continues to meet needs, evaluates PC effectiveness and congregation awareness. | Lack of interested volunteers | More volunteers; higher awareness of PC | Membership, Staff, PC coordinator | Ongoing |
| 2. Continue to build culture of caring as a UU "practice" | Lack of interested volunteers | Recognition of PC and caring as "ministry", articles, training, instructions on web | Membership, PC, Staff | Ongoing |
| 3. Continue PC training and attention to meeting social/emotional needs | Lack of Membership leader to collaborate with PC coordinator | Expanded training program in place | Membership, PC, and Staff | Ongoing 2006-2007 |
| 4. Develop and sustain a proactive, ongoing semi-annual phone contact: Continuing Connections | Lack of a plan and interested volunteers, staff time | Specific plans; sustained group to do the work each year | Membership, Staff, and PC coordinator plan collaborative approach | Ongoing |
| 5. Make it easier for members/friends to ask for help | Lack of a plan and interested volunteers, cultural barriers vs. technological | Note the increase in # of requests, # of people requesting help | Membership Committee leaders and PC Coordinator develop plans e.g. ZIP-code connecting | 2006-07 |
| 6. Formalize process to honor volunteers | Lack of consistent systematized process | Quarterly articles in Kaleidoscope, U-Mail | Membership Committee, PC Coord, Staff | 2006-07 |
| 7. Assess the need for greater professional leadership in light of increased activities.. | See Staffing Section. | | | |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

7.5 Governance

Goal #15: To Revise the USSB By-laws.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--|---|---|---------------------|-----------------|
| Form a Task Force to lead the effort. | Conflicting demands on key people's time. Limited psychological equity. | Task Force is formed | Board | Sep 2005 |
| Engage congregation in the revision process. | Congregation has already been asked to make significant contribution to planning. | Workshops have been held and/or surveys completed. | Task Force | 2005-2006 |
| Issue revised by-laws. | Potential conflict around controversial aspects of by-laws. | Revised by-laws accepted at Congregational meeting. | Task Force, Board | Jun 2006 |

7.6 UUA Denominational Support

Goal #16: To Support the UUA at the National Level and to Play a Leadership Role in UUA on the West Coast.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--|---|--|--|-----------------|
| 1. Maintain a leadership role with PSWD through: <ul style="list-style-type: none"> • staff mentoring; • facilitating workshops; • accepting positions on the PSWD Board, if nominated. | Dependent on motivation of individual staff and members | Mentoring, and workshops take place; USSB members in PSWD leadership positions | Ministerial team. ADC members | Ongoing |
| 2. Engage members in PSWD meetings and conferences. | Limited time, competing demands | Members are actively attending PSWD events | Ministerial Team, ADC members | Ongoing |
| 3. Establish formal communications with our partner churches globally. | | Coordinating group is known by congregation | Administrator, Program Council, Partner Church Committee | 2005-2006 |
| 4. Host a PSWD large church conference. | Resources of time and energy | Conference held | Ministerial Team | 2006-2007 |

Unitarian Society of Santa Barbara 2005 Strategic Plan

7.7 Staffing

During the next five years, the Society will be experiencing significant changes in our staff. It is known that our Parish Minister and Director of Religious Education (DRE) will be retiring in the next several years. Based upon their stated intent, the assumption was made that they will retire together at the end of the 2007-08 year, with a firm announcement of their decision by the end of 2006-07. Also, our organist is expected to retire during the term of this plan; and our children's choir director will be relocating.

We recommend that the Society engage an Interim Minister for 2008-09, with the aim of calling a Parish Minister for 2009-10 and beyond. This would involve the election of an Interim Search Committee in late winter of 2008, and the election of a Ministerial Search Committee no later than the Annual Meeting in June 2008. The search process is defined in the Society's bylaws.

Soon after the DRE announces her retirement, the Society must make a clear decision about what level of RE professional it wants to have – a Minister of Religious Education (MRE), a Certified Director of Religious Education, or a Level 2 Director of Religious Education. The Society will need time to explore the ramifications of various possibilities as well as the time to engage in an appropriate search. The search could take a full year, especially if the Society decided to call an MRE. In light of this, the plan specifies that the decision-making process be engaged in 2007-08, that the Society hire an interim (or acting) DRE for 2008-09, with the aim of hiring (or calling) someone for 2009-10 and beyond. (See Reference F for an explanation of typical job responsibilities and qualifications for these three alternatives.)

The Society should consider what sort of RE Professional it wants. Should the Society feel that a Level 2 DRE is acceptable, it may be possible for the Ministerial Search Committee to look for a team (very likely, though not necessarily, a married or committed couple) that would give the Society about 1 ½ FTE of called ministry, the extra ½ FTE being used for either Pastoral Care or Social Justice Ministry or both. This would clearly require the Society to increase its expenditure for ministry significantly, but the savings between the UUA Salary Guidelines for a Level 2 DRE and a Certified DRE might make this feasible. Further research will be needed before we embark on this path. Should the Society create such a proposal, it should carry with it a clear plan for moving to 2 FTE of called ministry.

There will be a need to educate the congregation about the possibilities and implications of decisions regarding a Professional Religious Educator. This role is likely to be performed by COSM, The Board, or a Joint Task Force between them. Since this is a decision that has profound implications for the Ministerial Team as well as the Congregation, the assumption is made in this plan that a Joint Task Force would be formed.

When our organist retires, we may have an opportunity to restructure the music (or choir) director position. Also the perceived local scarcity of fine and available organists may require focus on regular piano accompaniment with occasional organ playing contracted.

The Congregation has also indicated a desire for expanded programming that may require more professional leadership for our Pastoral Care and Social Justice programs, and for Volunteer Coordination. Having an Associate Minister with partial responsibility for these programs should be considered as staffing changes are discussed in the coming years.

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #17: To Successfully Transition to a New Ministerial Team.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--|-----------------|---|------------------------------------|-----------------|
| 1. Determine the level of RE professional needed when present DRE retires. Consider options including a Minister of Religious Education (MRE), a Certified Director of Religious Education, or a Level 2 Director of Religious Educator. | | Agreement reached on level of DRE/MRE to be recruited | Board of Trustees | Jun 2007 |
| 2. Establish Task Force to educate Congregation on the selection process for a new Minister and new RE Professional. | | Task Force is in place | Board of Trustees | Jun 2007 |
| 3. Elect Interim Minister Search Committee. | | Search Committee is formed | Nominating Committee, Congregation | Mar 2008 |
| 4. Elect interim RE Professional Search Committee. | | Search Committee is formed | Nominating Committee, Congregation | Mar 2008 |
| 5. Select Interim Minister. | | Interim Minister selected | Congregation | Apr 2008 |
| 6. Select Interim RE Professional. | | Interim RE Prof selected | Congregation | Mar 2008 |
| 7. Elect Ministerial Search Committee. | | Search Committee is formed | Nominating Committee, Congregation | Jun 2008 |
| 8. Elect RE Professional Search Committee. | | Search Committee is formed | Nominating Committee, Congregation | Jun 2008 |
| 9. Select new Minister | | New minister called | Congregation | May 2009 |
| 10. Select new RE Professional | | New RE professional selected/called | Congregation | May 2009 |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

Goal #18: To Consider Options for Staff Development During the Next Five Years.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--|------------------------------------|---|---|-----------------|
| 1. Hire a new Children's Choir Director. | | Children's choir director in place | Board of Stewards, Parish minister, Music Committee, Choir Director | Sep 2005 |
| 2. Establish a temporary part-time position to provide leadership for our teen group (or College age or Young Adult group) for the next two years. | Money Finding the right person | Paid person added to staff; Mind the Gap funds used | DRE, Board of Stewards | Sep 2006 |
| 3. Develop a staff development plan that describes the positions and time commitments needed to support an active, large church (550+ members). Consider part-time positions needed for <ul style="list-style-type: none"> • administrative support • program support/leadership, e.g., <ul style="list-style-type: none"> ○ Pastoral Care ○ Social Justice ○ Small Group Coordinator ○ Teen Leadership ○ Mind the Gap: College age, Young Adult leadership ○ Adult RE Coordinator ○ Volunteer Coordinator | Money, Finding the right people | Written report on staff development options | Board of Stewards | Jun 2006 |
| 4. Establish a Music Leadership Task Force with responsibility for identifying best staffing response when our organist retires. | | Task Force in place | Board of Stewards, Parish minister, Music Committee | When Needed |

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

7.8 Facilities

Goal #19: To Provide Facilities that are Functional, Attractive and Well-Maintained.

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|--|---|--|---|-------------------------|
| 1. Identify the facilities maintenance requirements and essential improvements for the next five years. Include a prioritization plan. | | Written lists for years 1, 2, 3 and 4/5. | Facilities Mgr. Administrator, Building and Grounds Committee | Jun 2005, then on-going |
| 2. Develop detailed budgets for next five years to address facilities maintenance requirements itemized in (1) above. | Time needed to obtain firm cost estimates | Budget items included in USSB annual budget | Facilities Mgr/ Administrator | Jun 2006, then on-going |
| 3. Implement deferred action items as scheduled in Item #2 above. | Available funds | Budget items included in USSB annual budget | Facilities Mgr/ Administrator | Jun 2005 – Jun 2008 |
| 4. Develop a full reserve study of facility and equipment to properly determine responsible annual accruals for long term management. | Staff time | Completed study with recommendations to Board/Finance for long-term budgetary planning | Administrator, Facilities manager, Buildings and Grounds | Jun 2006 |
| 5. Conduct a cost-benefit study of facilities to determine what actions will be taken, if any, to improve earthquake resistance. | Cost | Written study with recommendations and cost estimates | Facilities Manager, Buildings and Grounds | Jun 2007 |
| 6. Hire a qualified professional to conduct a study of options for creating adequate office space to accommodate an expanded staff in one centralized office area. The study shall indicate expected costs and address the likely permitting issues. | Cost | Written study with recommendations and cost estimates | Board of Stewards | Jun 2007 |
| 7. Conduct a “campus enhancement study” that addresses the potential to improve the appeal of our campus including meeting rooms, bathrooms, amenities, landscaping, and street appeal. | May be perceived as unnecessary expense | Written study with recommendations and cost estimates | Board of Stewards | Jun 2006 |
| 8. Explore options for providing additional parking space through arrangements with other churches and businesses in our area. | Availability of spaces; distance from church. Money | List of possible options presented to USSB Board | Facilities Mgr, Administrator | Jun 2006 |

8. Financial Resources

Unitarian Society of Santa Barbara 2005 Strategic Plan

During the last two or three years, the Society has invested time and energy towards developing a better understanding of the financial status of the Society. Several issues of concern have been identified, notably that (1) there is a considerable amount of maintenance that has been deferred for a number of years, and 2) the Society has donor restricted accounts that are presently not fully funded by cash. Unmet cash needs are funded with a cash flow line of credit.

The Board of Trustees has raised awareness of these financial concerns within the Congregation, and some initial steps have been taken to address these issues. Based on staff research, we now know that deferred maintenance is likely to cost over \$250,000, and an additional maintenance reserve of \$50,000 to \$100,000 is desirable to prevent the likelihood of having more deferred maintenance in the future. A \$70,000 loan has also been taken out to cover recent repairs to the Blake Building roof.

Together with Finance Committee representatives, staff has also conducted a detailed review of the restricted accounts. It is currently projected that as much as \$100,000 may be needed to fully fund these accounts.

Addressing these financial obligations is a high priority for the Society. Some of the deferred maintenance costs are being absorbed – along with ongoing maintenance needs – in the annual Operating Budget. However, this is a heavy burden to place on our Operating Budget. In recent years, we have conducted well-organized canvas campaigns, and our current goal is to secure “full share” pledges from all members. We are actively seeking ways to increase the income from use of our property. Still, our projected annual revenues are not expected to be sufficient to fully address the deferred maintenance costs and to fund the restricted accounts within a five-year time period.

The Strategic Plan includes goals for facility enhancements and the possible need for additional staff. The Plan aims to provide a path forward that balances these challenging, and somewhat conflicting, financial obligations. Given the current financial status of the Society, it will be a challenge for the Society to finance the desired growth as reflected in the goals expressed in this plan based on current operational revenues.

The proposed solution is to launch a Capital Campaign that will allow the Society to address our obligations and to allow us to accomplish our goals for the next five years. A successful Capital Campaign will allow us to achieve the following:

- Retire Blake roof loan debt
- Establish a reserve for deferred maintenance
- Upgrade facilities for more diverse and effective use to ensure long-term stability (roofs, Parish Hall remodel, landscaping)
- Renovate Blake and Jefferson to be more attractive
- Upgrade infrastructure and facilities
- Recruit additional staff by freeing up money in the operating budget

Goal #20: To Establish a Consistent Revenue Stream to Support our Routine Operational Budget Needs and the Growing Scope of Our Programs.

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

| Measurable Steps | Barriers | Measure of Success | Who Does it? | By When? |
|---|---|--|---|--|
| 1. In each of the five years, maintain a strong commitment to our Full Share Giving campaign appealing to all members to make Full Share pledges. | Need for committed stewardship leadership | Each year, pledges exceed prior year pledges | Stewardship | Annually |
| 2. Develop balanced Operating Budgets annually that incorporate facilities maintenance. | | No Year-end budget deficits | Budget Task Force, Administrator, Board | Annually |
| 3. Plan Developed to fully fund the Society's Restricted Accounts. | Competing needs for finances | Fully funded accounts according to plan | Board Of Trustees, Finance Committee, Administrator | Jun 2006 |
| 4. Prepare for and conduct a successful Capital Campaign. | Funds for consultants Some members will be reluctant to engage in this Conflicting time demands for congregational engagement | Preliminary plans developed with consultants Congregational input on preliminary plans Congregational vote to select plan Feasibility Study on selected plan Congregational vote to approve campaign Fundraising launched | Board of Trustees | Jan 2006 Feb-May 2006 June 2006 Summer 2006 September 2006 September 2006 |

Unitarian Society of Santa Barbara 2005 Strategic Plan

9. Implementation

“What Are the Next Steps?”

The Task Group hopes detailed implementation steps within each section of the plan are self-explanatory. Task Group members made a special effort to identify specific, measurable, realistic time-based actions. As part of that effort we identified who or what group was responsible to take action. We also vetted the plans with our experienced professional staff.

Next, we looked for the key cross-cutting solutions that require collaboration across many parts of our organization, and ones that impact our core resources: people, facilities and finances:

- To prepare for and accommodate many staff changes including Parish Minister, Director of Religious Education, Organist, and Children’s Choir Director;
- To address the deep backlog of deferred maintenance and upgrade our facilities;
- To improve our financial soundness, establish adequate reserves, and exercise a discipline of fiscal responsibility;
- To restructure and revitalize our Membership Committee, and to stimulate an epidemic of friendship and connecting throughout the congregation;
- To revitalize our teen program and initiate college and young adult programs;
- To sustain our high quality music programs and intellectually stimulating worship services.

We offer this plan as a living document, to be interpreted, acted upon, and revised by the lay leaders, staff, and congregation as a whole, per our by-laws and established procedures, as opportunities, challenges, and most appropriate solutions are revealed over the next five years.

Finally, we most strongly encourage future leadership to follow these recommendations, which we feel are essential for the plan to become more than a statement of ideas back in June 2005.

1. The Board appoint a standing Long Range Planning Committee.
2. The Board or its appointees review the progress on and status of action items annually, or semi-annually if possible.
3. The revised or new action items and goals (after review) are energetically and widely distributed to the congregation.
4. The progress on goals and action items is openly, loudly, clearly celebrated so the congregation can feel its own power to create a positive future – a future that reflects our highest aspirations and ideals, a future that can be practically accomplished step-by-step through the goodwill and work of our members.

The Task Group: Ivor John, chair; Barbara Margerum, Bruce Hanna, Doug Thomas, John Warnock, Ken Collier, Patricia Reilly

**Unitarian Society of Santa Barbara
2005 Strategic Plan**

10. Reference Documents

These are not included in the printed document but available in electronic format on website (and in print if needed).

- A Searching For The Future Workshops
- B Congregational Survey
- C Focus Group Meetings
- D Models of Different Size Churches
- E Large Church Discussion – Staffing Requirements
- F. Description of Religious Education Professionals
- G Long Range Facility Budget