

**Unitarian Universalist Congregation
of
Green Valley**

**Five Year Plan
2011-2016**

**Adopted April 17, 2011
Amado, Arizona**

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“THIS IS WHO WE ARE,” UNITEL, April, 2010

Introduction

This draft long-range plan was developed over a two-year period by a committee established by the Board of Directors.

The purpose of developing the plan is to help the Congregation, through its Board and committees, become the vision that it seeks to be and achieve the mission (purpose) it has set for itself. The Plan is thus a form of roadmap for getting to the place where the Congregation wants to be. As a roadmap, the Plan sets out directions but remains general rather than detailed. The Plan does identify the need for further detailed studies of certain complex issues and those areas, such as finance, that require specific expertise.

The Plan basically moves from the general to the specific. It starts with a Congregational covenant statement followed by vision and mission statements. It then establishes specific goals, actions to achieve those goals, benchmarks by which to measure progress, and designation of the congregational group responsible for each action.

The suggested goals and actions have come from members of the Congregation themselves. In a number of instances, the actions are already underway.

In developing the Plan, committee members were mindful that not every member of the Congregation could be expected to agree with every item in the plan. Also, unforeseen developments may create new opportunities and challenges for the Congregation not anticipated in this Plan. But your Long Range Planning Committee hopes that you will see this as a realistic plan to establish and achieve the Congregation's mission in the coming years.

How the Plan was Developed

In the spring of 2009, the Board of Directors determined that a plan to identify and address the future needs of the Congregation was needed. The Long Range Planning Committee (LRPC) was appointed and charged as follows: “To develop recommendations to the Board and Congregation on what and where UUCGV wants to/should be in 1-3-5-10 years from now and how do we get there.”

A classic “bottoms up” planning process was adopted by the LRPC to assure that the Plan would accurately reflect the hopes and aspirations of the Congregation and thus be reasonably likely to be implemented. Using the website “SurveyMonkey,” a survey was designed to elicit answers to such questions as these:

Who are we?

What values matter to us, how much, and in what order?

What are we doing now to realize those values, and how successfully?

Who among us is doing it?

After the design, the survey was tested, then distributed, tested and analyzed. Sixty-seven percent of the membership completed the survey. A report of the findings was made available to the full congregation and is included here as Appendix C.

Next, we held a Saturday morning workshop to fashion a vision that is a picture of what we wish to become and a mission statement to identify what we believe to be our purpose in being. From that workshop, the resulting vision and mission statements were then circulated to the entire membership for review and comment.

Members of the LRPC next met with the various groups and committees of the organization to describe the planning process and to ask for input to formulate goals and objectives (benchmarks) to meet as measures of achievement of our mission.

Following a summer break, work began in the fall of 2010 to determine actions as suggested by the committees of the Congregation, which would lead to the goals as previously established. These proposed actions were then run by the committees to see if there was still interest in carrying them out. Those that have been accepted by the responsible parties became the initial strategies to implement the Plan.

A workshop that had been planned for the late fall of 2010 to discuss the benefits and costs of membership growth was subsequently moved to January of 2011, too late for inclusion in the initial plan document. Results of a special task force to examine these issues will be incorporated into the Plan when available.

Following the release of the draft Plan, a meeting of the Congregation will be held in late March to discuss the Plan, and final revisions will be made. Adoption of the Plan by the Congregation is scheduled for early April.

As with any endeavor, the passage of time and the occurrence of unanticipated events may render portions of the Plan unrealistic or undesirable or identify unaddressed

issues. The Evaluation cycle, scheduled for every two years, provides the opportunity for revisions and expansions to the document.

Members of the Long Range Planning Committee

As initially constituted, the Planning Committee's seven members were Barbara Brusstar, Chairperson, Jeanne Casey, Betty Jachim, Larry Klose, Mary Lou Prince, Chuck Stedman and Gareth Ten Cate. Subsequently, Jeanne Casey, Mary Lou Prince and Gareth Ten Cate, resigned and were replaced over time by Mary Lou James, Marilyn Kern and Phil Cogswell.

Long Range Planning Definitions

Congregational covenant:

Our Congregational Covenant is our commitment to work together cooperatively in support of our vision and mission.

Vision:

Our vision is our organization as we would like to be. It is the best that we can be.

Mission:

Our mission is our purpose in being. It is in accomplishing our mission that we will realize our vision of our organization.

Goals:

Goals define future expected outcomes. They focus on ends rather than means. They are general, intangible. Goals are directed toward achievement of our mission, our purpose.

Benchmarks:

Benchmarks are measurable, specific time-defined plans to achieve a goal. They are precise, tangible. They may be short term, intermediate, long term.

Action Plans:

Action plans specify the process by which a benchmark is to be achieved and the group(s) responsible for carrying out that process. Action plans are short term, for the most part. Some are already under way, some have been completed. Each revision of the Plan will lead to new action plans.

Congregational Covenant

We, the members of Unitarian Universalist Congregation of Green Valley, in order to carry out our mission and realize our vision of the future, covenant with each other

- To work together through cooperative and mutually respectful discourse,
- To support and participate in congregational activities and projects through our presence, gifts and service, and
- To support measures to enhance the effective and long-term well-being of our congregation.

Vision

Our Vision:

A welcoming congregation in the liberal religious tradition that honors diversity in members and viewpoints, values reason and freedom in intellectual and spiritual exploration, and acts on its concerns for all people and the earth on which we exist.

Mission

Our mission is to

- Affirm and promote the seven Principles of Unitarian Universalism;
- Provide interesting, creative programs to stimulate the congregation and the greater community;
- Foster intellectual growth and free religious exploration for persons of all ages and interests;
- Honor the earth and work to attain a viable, sustainable world;
- Engage in social action in the cause of liberty, justice and well-being for all people

Fulfilling our Mission

We have organized the goals and benchmarks by the purposes of the mission.

(1) Affirm and promote the Seven Principles of Unitarian Universalism:

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

This initial element of our mission is a covenant to adhere to these basic tenets. These shared principles bind us to other Unitarian Universalist congregations, describing our shared values and how we work together.

Goal:

Full congregational awareness and acceptance of these principles and incorporation into our undertakings.

1-year benchmark: Periodic discussion during programs and in newsletter, and bulletins, among other efforts, to inform new members and remind continuing ones of the principles.

Action plan:

1. Remind presenters of the need to link comments to the principles whenever appropriate:

Responsibility: Sunday Services.

2. Insert reminders and discussion of principles in newsletter and bulletins,

Responsibility: Newsletter and bulletin preparers.

3. Incorporate discussion of principles in new-member meetings.

Responsibility: Membership.

Note: The remaining elements of our mission and long-range plan based on it also are intended to support these principles.

(2) Provide interesting, creative programs to stimulate the congregation and the greater community

and

(3) Foster intellectual growth and free religious exploration for persons of all ages and interests.

Goals:

1. Fully supported professional and lay ministry programs;
2. Broad-based Sunday forum topics that continue to reflect membership interests;
3. Community Outreach Program reflecting topics of value to the membership and community and that include community service.
4. Fully supported, professionally led Music Program with stimulating and creative content.
5. Religious Exploration Program meeting member needs for spiritual growth and enlightenment and historical and social context.

5-year Benchmarks:

1. Settled minister;
2. Fully operation Small Group Ministry Program;
3. Music programs staged in surrounding communities and open to the public;
4. Religious Education Director with budget for materials;
5. Attendance at Sunday Forums continues to confirm relevancy of programs.

3-year Benchmarks:

1. Business Plan adopted to fund, recruit and engage settled minister.
2. Small Group Ministry serves 50 percent of Congregation.
3. Community Outreach Program is implemented.
4. Attendance at Sunday Forums continues to reflect relevancy of programs.
5. Sunday music programs are original, varied and balanced.
6. Develop programs for outreach and visitation to other congregations and organizations.
7. Transition of Religious Education Programs from ad-hoc presentations to regular, scheduled programs.

Action Plans:

1. Develop a forum topic/speaker process based on membership interests and assign responsibility for coordinating presentations.

Responsibility: Sunday Services Committee.

2. Develop the Small Group Ministry Program and train lay leaders.

Responsibility: Small Group Ministry

3. Develop the Community Outreach Program and begin implementation.
Responsibility: Community Outreach Committee to be appointed by the Board.
4. Appoint Community Outreach Committee and adopt guidelines for UUCGV support of and participation in non-UUCGV community outreach programs.
Responsibility: Board of Directors.
5. Develop feasible business Plan to acquire settled minister.
Responsibility: Finance Committee
6. Develop lay Pastoral Care Program and train participants.
Responsibility: Caring Committee.

4. Honor the Earth and offer leadership toward a viable, sustainable world.

Goals:

1. Activities, programs and practices of our congregation reflect environmental best practices.
2. UUCGV provides inspiration, knowledge, encouragement and commitment to the larger community toward the promotion of sound environmental practices.

5-year Benchmarks:

1. Solar panels and/or other energy saving devices are installed in Placita del Sol.
2. Resource center is established for current scientific sustainable-world information.
3. UUCGV organizes first regional conference of sustainability groups.
4. Fifty percent of members carpool to services.

3-year Benchmarks:

1. Funding study completed for Solar panel/other energy saving devices at Placita del Sol.
2. Study of transport van/bus for services and events is completed.
3. Xeriscaping at Placita del Sol completed.
4. Program of outreach seminars on sustainable-world issues initiated and promoted via a network of local and regional organizations.
5. Thirty-five percent of members carpool to services. **Action plans:**
 1. Complete a study of funding for solar panel/energy saving devices for Placita del Sol.

Responsibility: Building and Grounds.

2. Design and implement a network for carpooling to attract at least 15 percent of members.

Responsibility: Save Our Planet Alliance (S.O.P.A.)

3. Bring Amado building into line with green practice guidelines for heat/cold balancing.

Responsibility: Building and Grounds.

4. Adopt policy statement of “green guidelines” for kitchen use, community events and selection of appliances and equipment.

Responsibility: Building and Grounds.

5. Develop curriculum for public seminars and programs on environmental issues.

Responsibility: S.O.P.A.

6. Identify and organize into network, local individuals and groups promoting sustainable-world practices.

Responsibility: S.O.P.A.

7. Install solar tubes and/or skylights in kitchen and other locations for natural interior lighting.

Responsibility: Building and Grounds.

8. Ensure fullest possible xeriscaping has been accomplished.

Responsibility: Building and Grounds.

5. Encourage social action in the cause of liberty and justice.

Goal:

Be established as a community and regional center for education and action on issues of social justice.

3-year benchmarks:

1. Sponsor public forums, seminars and other educational programs to demonstrate to the community that we are an active Welcoming Congregation and to raise public awareness of gay, lesbian, bi-sexual and transgender issues.
2. Sponsor public education programs and increase membership understanding of cultural and other local issues.

2-year benchmark:

1. Demonstrate congregational support for enlightened resolution of border issues by means of educational presentations, publication of letters and op-ed pieces in local publications.

1-year benchmarks:

1. Assure continued support of local food bank program.
2. Schedule Sunday programming focusing on local issues and cultural differences.

Action plans:

1. Establish Justice Action Network.

Responsibility: Board of Directors.

2. Establish Justice Advocacy Team to 1) raise awareness of justice issues and volunteer opportunities, 2) encourage participation and action and 3) promote better communication within our congregation.

3. Adopt policy to identify and support local food banks and appoint representative.

Responsibility: Board of Directors.

4. Develop a Sunday Forum program focusing on local cultural issues, recruit knowledgeable and effective speaker(s) and schedule at least once a year.

Responsibility: Sunday Forum Committee, Justice Advocacy Team, Minister.

5. Sponsor one regional seminar or workshop on GLBT issues.

Responsibility: Welcoming Committee.

6. Establish telephone tree alert system and “kitchen table” write-in program for responding to GLBT issues with letters to local media.

Responsibility: Welcoming Committee.

7. Co-host the Border Issues Fair by 2013.

Responsibility: Justice Action Network .

6. Support the Mission.

Goals:

1. A viable and stable financial base to support the mission of UUCGV with the membership fully committed to sustaining stewardship.
2. An organization structured to enable full achievement of our mission.
3. Broad-based and recognized member participation in the work of the organization.
4. Congregation is a caring community offering fellowship, friendship and support to meet the diverse spiritual, intellectual and social needs of its members.
5. Membership growth that enables a constant flow of new ideas, enthusiastic participation in congregational activities and a stable financial base.

5-year benchmarks:

1. Annual operating budgets are balanced.
2. Property reserve fund is fully funded.
3. Endowment fund totals \$50,000.

3-year benchmarks:

1. Annual pledges support 80 percent of operating budget.
2. Property reserve fund is 50 percent funded.
3. Operating reserve fund is fully funded.
4. Endowment fund totals \$35,000.
5. Committee work and participation is recognized annually in a special service.
6. 100 percent of membership pledges annual support.
7. Growth study is completed, examining positive and negative aspects and establishing ideal growth targets.

1-year benchmarks:

1. 90 percent of able membership pledges annual support.
2. Property Reserve Fund is implemented.
3. Endowment fund totals \$27,000.
4. Planned Giving Program is developed and implemented.
5. Board and Committee Manuals are reviewed and revised annually and upon turnover.
6. Comprehensive financial plan is adopted.

Action plans:

1. Develop comprehensive financial plan to assure a stable financial base to support the mission of UUCGV including the ability to call a settled minister.
2. Complete Property Reserve Study and begin implementation.

Responsibility: Building and Grounds Committee.

3. Develop and actively promote Planned Giving Program.

Responsibility: Endowment and Planned Giving Committee.

4. Revise Pledge Program for full-year coverage and participation.
Responsibility: Board of Directors and Finance Committee.
5. Establish credit card and other pledge payment systems.
Responsibility: Finance Committee.
6. Evaluate committee structure in relation to mission.
Responsibility: Board of Directors.
7. Evaluate/revise Board and Committee manuals to assure charge, term, size, duties, and reporting responsibilities are specified.
Responsibility: Board of Directors and each Committee.
8. Develop Recognition Program of Committee membership, responsibilities and accomplishments.
Responsibility: Board of Directors.
9. Conduct demographic study of adjacent communities.
Responsibility: LRPC or Membership Committee.
10. Survey membership every three years to determine how well the organization is meeting their spiritual, intellectual and social needs and develop responses to any unmet needs.
Responsibility: Board of Directors.
11. Investigate the development of a Pastoral Care Lay Ministry Program.
Responsibility: Caring Committee.
12. By November, 2011, establish a Task Force, composed of representatives from Membership, Finance, Building and Grounds, and Sunday Services committees, to report on the positive and negative aspects of membership growth no later than April, 2012.
Responsibility: Board of Directors.

Evaluating Progress

Plans can only be as useful as the assumptions that underlie them and the extent to which they are implemented. Even if assumptions underlying the Plan are valid when it is adopted, unforeseen circumstances can render them – and thus perhaps the Plan itself – invalid over time. Thus, the need to periodically revisit and potentially revise the plan is built into the action portion of the process.

Approximately one year after conclusion of a planning cycle, it is important to take a look at the progress in implementing the Plan. We should determine whether the plan is being implemented as intended and whether progress toward achieving its goals is evident. If not, it is important to determine why not.

Guidelines for review:

Outcomes:

Review of progress will be guided by outcomes as the congregation perceives them.

- Have we become what we envision?
- Have we progressed toward meeting the goals we set for ourselves?
- Have we achieved the benchmarks within the time period set in the plan?
- Are we meeting the members' needs?

Understanding shortcomings:

In evaluating the answers to the above questions ask, "If not, why not?"

Revisions:

In addressing perceived shortcomings ask,

- Have the necessary resources been made available to those responsible?
- Should the goals or benchmarks be changed?
- Should timelines be changed?
- Should specified actions be changed?

Schedule for review: Review and revision will be undertaken in one year (2012), three years (2014), and five years (2016). All plan revisions will be adopted by the congregation. Included in the five-year review will be potential revision of the vision and mission statements.

APPENDICES

Appendix A: Brief History of the Congregation

1970-81: A small group attended 22nd Street UU Church in Tucson and later met in members' homes in Green Valley. **1981-89:** Becoming too large to meet in homes, the group moved to rooms at a bank. In 1982, the group became charter members of the Interfaith Council. A UU workshop was held to draft "Operating Procedures" for an unaffiliated UU group with an executive committee and budget.

1990-95: Membership grew, so the group moved to La Posada. The group affiliated with the UUA as the Unitarian Universalist Congregation of Green Valley. Forty-five signed as members, and 22 signed as friends.

1995-99: The congregation grew and rented Canoa Hills Social Center. A committee formed to find a site for a permanent meeting house. Sunday Services were held with twice-a-month Forums. A UU member initiated an Interfaith Council service on MLK day. Membership increased to 105 with 42 associate members, and the Congregation voted to search for a part-time minister. Rev. Scotty Meek, retired, served as the first part-time interim minister, preaching twice a month. Church offices were rented in the Continental Professional Plaza. Women's, Spanish conversation and book groups were formed. The Congregation called Rev. Lewis Dunlap as half-time minister.

2000-04: Rev. Dunlap resigned, and Rev. Linda Bunyard became our half time contract minister. The search for a permanent home continued, and a 2.75-acre property in Sahuarita with a house suitable for offices and small group meetings was purchased.

2004-06: Rev. Bunyard and Rev. Randy Meyer, of the United Church of Christ, started the Border Issues Coalition and the first Border Issues Fair was held. Building and Endowment funds were separated from the operating budget. The fiscal year was changed to a calendar year. Following a year's study, we became a "Welcoming Congregation".

2007-09: Rev. Linda Bunyard resigned. Rev. Roy Philips and Rev. Charles Gaines served as contract ministers for Sunday services. Ellen Germann served as a consultant. A music director and part-time office manager were hired. A minister compensation item was added to the operating budget, and the Ministerial Search Committee was asked to seek an interim minister. Rev. Roberta Haskin was engaged as interim minister. A building was purchased in the Amado Territory Ranch, south of Green Valley. A capital fund drive, along with the proceeds from the sale of the Sahuarita property, provided the funds for this purchase.

2010: Renovation was completed and the first service was held in April. The dedication service was held on November 16. Rev. Haskin retired, and Rev. William Haney was engaged as interim minister.

Historical information was prepared by Mary Lou James, Mary Lou Page, Jeanne Casey and Merilys Brown. (A more complete history is located in the Congregation office.)

Appendix B: Survey of Congregation: “This is Who We Are”

Summary of the Congregational Survey Findings

The survey of the Congregation by the Long Range Planning Committee has been tabulated and is now available online or in hardcopy for those without computers. The findings do not show a dramatic change from previous surveys but do give us an accurate snapshot of the Congregation at this point in time and will help us to propose realistic measures to achieve the goals and objectives that make up the plan.

Ninety congregants (67% of us) completed the survey: 85 members, three associate members and two who declined to state. Of these respondents, 69% are age 71 and older, 5% are age 60 and younger. Seventy percent are female.

Most of us (66%) do not live alone and most of us (72%) are full-time residents. None of those responding have children living at home. Fifty-eight percent of us had previous UU membership prior to joining UUCGV. We are well educated. All have had at least some college and more than half of us (52%) have post-graduate degrees.

We are mostly a congregation of comfortable, if modest, income. One-third of us have incomes between \$50,000 and \$80,000, one-third of us enjoy incomes greater than \$80,000, and one-third of us manage on incomes of less than \$50,000.

Most members participate in congregational activities through service on boards and committees (56%) and in UUCGV social activities (57%).

In regard to the importance of congregational focus, most members placed highest importance on intellectual stimulation (82%), fellowship (83%) and music (78%). Respondents ranked Prayer (59%), and Children’s RE (41%) as “not very important.”

In determining the importance of individual values, 87% of members responding ranked “democratic” ideals/practices “very important,” followed by fellowship (78%), music (77%), humanitarian action (71%), and environmental issues (70%).

Twenty-four members made thoughtful comments which will be discussed and considered by the Long Range Planning Committee.

-- UNITEL, April 2010