

2019 Strategic Planning

Preliminary Recommendations

Prepared for discussion by the Strategic Planning Committee

First Parish Sudbury

April 2019



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Key Messages

1. First Parish needs to take **immediate** action to ensure the health and continuity of our congregation.
2. The Strategic Planning Team (SPT) has defined 3 Goals, supported by 7 Strategies.
3. YOUR HELP IS NEEDED to own and implement these strategies.

The urgent needs of our congregation will not be met by “business as usual.”

Today, we’re requesting your feedback to ensure we’re focused on the right things and are broadly aligned across our membership.



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Agenda

- Objective
- Recommended Goals
- Recommended Strategies
- What the Strategic Plan IS and IS NOT
- Critical Requirements for Success
- Next Steps
- Discussion
- Appendix



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Objective

Objective: To define an actionable 5-year Strategic Plan for First Parish of Sudbury (FPS) aligned to ensure the health and continuity of our congregation, and in alignment with our Mission and Covenant.

Mission:

We are First Parish of Sudbury, a diverse and welcoming community of spiritual seekers; we strive to learn together and support one another as we celebrate life's important moments and serve the larger community.

Covenant:

We the people of First Parish of Sudbury pledge that we will come together with open minds and open hearts, always seeking to learn, to share, to respect and forgive, and to help each other grow towards our best selves.

One community, first and foremost, compassionate, respectful, and generous, we pledge to listen to each other, express our views openly, handle disagreement with honesty, humility and humor, and nurture our sense of belonging together.

We pledge to participate in the work of the congregation to the best of our abilities, to practice and encourage leadership, and to support our ministry materially, emotionally, and spiritually.



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Recommended Goals

Over the next five years (recognizing some areas require immediate action)...

- We will **expand the size of our congregation 5-10% per year** as we attract diverse individuals and families from the greater Sudbury region to join us in a vigorous and proactive search for spiritual and personal growth, social justice, and community service.
- We will continue to **enhance the aesthetic, historic, and functional value of our centrally located meetinghouse** in Sudbury so that it is a gathering place that reflects the energy, commitment, and spirit of our members and the community.
- We will **secure the long-term financial sustainability of our congregation.**



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Recommended Strategies

1. Refresh existing/ implement new revenue streams
2. Tightly manage costs, regularly reviewing expenditures and making adjustments as necessary
3. Reexamine and potentially refresh our activities and services, including the "Sunday Service," to ensure it meets congregational and community needs
4. Assess the spiritual and community needs of the congregation and the broad ministerial requirements to meet those needs
5. Rededicate FPS's commitment to its Religious Exploration (RE) program
6. Professionalize FPS's marketing and communications
7. Revisit FPS governance to ensure sustainability, strong continuity, feedback, and coordination among diverse and regularly changing groups/ leadership



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Strategy 1:**Refresh existing/ implement new revenue streams****Sample Areas to Address:**

- New membership
- Fundraisers
 - 3-4 \$10-15K fundraisers would make a big impact
- Events
 - Including, weddings, musical events/ coffeehouses, celebrity dinners, etc.
- Estate Planning
- Building Rentals

Sample areas for further information/ investigation:

- Examine each room/ space for potential use/ rental opportunities.
- Identify potential revenue partners— Partnership with wedding planners, other congregations, etc.
- What is the level of financial impact compared to level of effort/ resources required to achieve them?
 - Prioritization based on impact
- Insurance implications of any recommendations?



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Strategy 2:**Tightly manage costs, regularly reviewing/ adjusting expenditures as needed****Sample Areas to Address:**

- Building costs
- Staffing costs
- Programming costs

Sample areas for further information/ investigation:

- Assessment of staffing needs
 - Impacted by Strategy #4
- Renegotiate supplier contracts as appropriate
- Explore potential use of community preservation funds, etc.



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Strategy 3:

Reexamine and potentially refresh our activities and services, including the “Sunday Service,” to ensure it meets congregational and community needs

Sample Areas to Address:

- “Sunday Services”
- Traditions
- Interest Groups
- Events
- Classes

Sample areas for further information/ investigation:

- What programming would potentially bring new segments of the community into the meetinghouse?
- What are other congregations doing that is drawing people in?
- What is required to enhance the building to make it more attractive for different uses?
- Explore what’s working/ what should be revived?
- Identify what’s not working/ what should be ended?



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Strategy 4:

Assess the spiritual and community needs of the congregation and the broad ministerial requirements to meet those needs

Sample Areas to Address:

- Define professional requirements vs. potential for lay leadership including
 - Pastoral care
 - Spiritual programming
 - Social justice, etc.
 - “Worship” support

Sample areas for further information/ investigation:

- Survey to define congregational expectations/ requirements
 - Create sufficient space for a diversity of voices and perspectives, etc.
 - Speak in a variety of styles that resonates with people



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Strategy 5:**Rededicate FPS's commitment to its Religious Exploration (RE) program****Sample Areas to Address:**

- Program assets/ curriculum
- Nursery through Adult
- Recruiting efforts
- Professional staffing needs, market and cost
- Volunteer staffing

Sample areas for further information/ investigation:

- Participant market assessment
- Professional staffing costs/ requirements (hours)
- Volunteer staffing requirements/ availability
- Nursery through Adult program requirements



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Strategy 6:**Professionalize FPS's marketing and communications****Sample Areas to Address:**

- Professional marketing support
- FPS Website
- Print media
- Social Media
- Word of mouth
- Personal relationships
- Pamphleteering/ flyers (for events—not services)

Sample areas for further information/ investigation:

- Identify marketing expertise from within the congregation
- Explore potential scope/ cost of professional marketing support
- What is our target demographic, and how do we best reach them?
- Update communications methods
- Identify which of our communications vehicles is working (what do people read), which is not?



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Strategy 7:

Revisit FPS governance to ensure sustainability, strong continuity, feedback, and coordination among diverse and regularly changing groups/ leadership

Sample Areas to Address:

- Board
- Committees
- Council
- Staff
- Finance

Sample areas for further information/ investigation:

- Re-establish a feedback mechanism for staff
- Improve how we communicate with new members, including onboarding and mentoring
- Consider establishing “Meeting for Business”—a monthly all congregational business meeting
 - Financial transparency
 - Opportunity to ask questions/ raise issues
 - Could also be quarterly...
 - Potluck—then into the meeting.
- Potential to streamline administration of the church so it's more clear, can be managed more easily
- Create information/ data owners—who do you go to get information. Right now it's confusing.



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What the Strategic Plan IS and IS NOT...

The Strategic Plan IS:

- A recommendation of what, after studying our situation, the Strategic Planning Team thinks the congregation should focus on/ do to address FPS's needs
- A living, breathing plan that will require:
 - Your active support and volunteer energy to be successful
 - Further investigation and recommendations
 - Adjustment over time as our situation changes

The Strategic Plan IS NOT:

- A “silver bullet” with all of the answers to all of our needs
- An order or decree forced upon the congregation of FPS
- An action plan that the Strategic Planning Team or the Board will implement without your participation



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Critical Requirements for Success

- **YOUR active engagement**– we need your time and energy **NOW** before it is too late!
- **Change can be hard...** but change is necessary for progress to be made.
- **This is not a negative experience**– it's an **OPPORTUNITY** to build a positive future for ourselves and our community.
- **Change is EXCITING**– this is your chance to make a real difference in securing FPS's future.



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Next Steps

Review recommended Goals, Strategies and Tactics with the broader FPS Congregation

- **Solicit feedback from FPS's membership.**
 - Are we on the right track? What changes/ updates would you recommend?
- **Solicit engagement and ownership.**
 - An “all-hands on deck” approach is required, tapping into our members' broad expertise and energy.
 - What subject matter, time and energy can you bring in further developing these strategies and tactics? Which are you personally willing to own or support in the year ahead?



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Next Steps (continued)

In preparation for Annual Congregational Meeting (ACM) on June 9th

- **Establish clear ownership for each strategy, including teams (SWAT teams, not committees!) to support Tactical exploration and recommendations**
 - **Note:** Strategic Teams will be **supported** by a member of the Strategic Planning Team (SPT), but the SPT member will *not* be the team leader.
- **Meet as needed to ensure readiness for the ACM**
- **Make progress on Strategies and Tactics, establishing clear recommendations and tactical actions for the year ahead**



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Next Steps (continued)

Approach: What's needed for each Strategy for ACM on June 9th

- **Planning:** April/ May
 - For *each* Strategy, volunteers define the work to be done
 - Recommend actions to be taken immediately– “Just DO IT!”
 - Recommend 2019-2020 plan by quarter
 - July-September
 - What should your group do over the summer to ensure a strong start to the year?
 - October-December
 - January-March
 - April-June
- **Timeline**
 - **Planning:** 6-weeks (April-May)
 - **Prepare Warrant** (3-weeks in advance of Annual Congregational Meeting)
 - **Board Review** (first week of June)
 - **Material preparation** for Annual Congregational Meeting



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Template Action Plan

Strategy 1: Refresh existing/ implement new revenue streams				
Just DO IT!	July - September	October - December	January - March	April - June
Immediate Actions	July - September	October - December	January - March	April - June
Actions:	Actions:	Actions:	Actions:	Actions:
Outputs/ Accomplishments:	Outputs/ Accomplishments:	Outputs/ Accomplishments:	Outputs/ Accomplishments:	Outputs/ Accomplishments:



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Concepts to consider for defining tactics and plans for immediate and 2019-2020 implementation

- **Prioritization:** We don't have the time, energy or funding to do everything. What should the top priorities be for your Strategy immediately, next year, the following year?
- **Just DO IT**– things that we can and must start doing immediately
- **Metrics:** What does success look like, and how can we define and track key metrics to measure performance/ progress?
- **Trigger Points:** “If X happens, then we recommend FPS do Y.”
- **Rate or Extent of Implementation:** This could relate to speed, investment, or degree. Think of it as low, medium, or high.



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Next Steps (continued)

Annual Congregational Meeting

- Present FPS's Five-year Strategic Plan, and vote for its approval

Immediately begin implementing “Just Do It” Tactics, progress Strategic plan in support of Goals

Recommended: Continue certain Tactical work/ meetings through the Summer to ensure a strong start to FPS's 2019/2020 programming year.

- Examples include preparing September marketing and communications targeting potential RE attendees; Harvest Fair



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... and now, it's time for

Open Discussion



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APPENDIX

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Findings:

Four Scenarios Task Force

- Presentation with Notes:



Scenarios Presentation with Notes 2018_11_18.pdf

- Analysis:



Scenarios 2018_11_18.pdf



Four Scenarios
Template



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Approach

- The Strategic Planning Team consists of
 - Jim Gish • Carolyn Lee • Leslie Lowe • Mark McNamee • Sheila Murphy
 - Emarie Pope • Val Tratnyek • Chad Trexler • Mark Trone

... with ad hoc support from Debra Morris-Bennet, Fred Pryor, Lois Schiappa and Fran Sharp
- This work builds on the work of the Four Scenarios Task Force
- Approach
 - Reviewed findings of the Four Scenarios Task Force to frame FPS's current state and needs
 - Brainstormed ideas and opportunities to address FPS's current situation and align for the future
 - Grouped brainstorm items into logical categories
 - Used Brainstorm categories to identify Goals for FPS to achieve within the next five years
 - Identified potential Strategies and Tactics to achieve the defined Goals



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Recommended Strategies (Supporting SPT member)

1. Refresh existing/ implement new revenue streams **(Val)**
2. Tightly manage costs, regularly reviewing expenditures and making adjustments as necessary **(SPT)**
3. Reexamine and potentially refresh our activities and services, including the "Sunday Service," to ensure it meets congregational and community needs **(Mark M., Leslie)**
4. Assess the spiritual and community needs of the congregation and the broad ministerial requirements to meet those needs **(Carolyn, Jim)**
5. Rededicate FPS's commitment to its Religious Exploration (RE) program **(Leslie, Mark T.)**
6. Professionalize FPS's marketing and communications **(Chad, Emarie)**
7. Revisit FPS governance to ensure sustainability, strong continuity, feedback, and coordination among diverse and regularly changing groups/ leadership **(Emarie, Val)**



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