

# ***Carbondale Unitarian Fellowship Strategic Plan: 2006 – 2011***

## **Executive Summary**

Over the last five years, we, the members of the Carbondale Unitarian Fellowship, have distilled our individual dreams into a collective vision, built a consensus in support of that vision, and created a reality that embodies it. With this experience to encourage us, we now undertake the review and renewal of our vision, based on input from our membership, our committees, and open congregational meetings and discussions. This 2006-2011 Strategic Plan identifies five major goals that build upon and extend our achievements to date, articulates objectives that help us meet those goals, and highlights resources we will need, including those we currently possess and those we will need to add.

### **The Goals to Which We Aspire**

**Goal 1: *A Stronger and Deeper Community.*** We will strengthen our growing Fellowship by building upon our strong sense of community. We project that our membership will continue to increase at a net rate of about 5% per year. We will respond actively to the challenge to help new members find or create a space within the fabric of our community, and will put special effort into building an intergenerational community.

**Goal 2: *Personal and Spiritual Growth.*** We will address the personal and spiritual needs of our theologically diverse congregation through energizing Sunday services that bring the values and principles of Unitarian Universalism to bear upon our daily lives, through a rainbow of social, experiential, and curriculum-based programs, and through diverse and spiritually enriching music.

**Goal 3: *Enhanced Religious Education.*** We will take our successful Religious Education (RE) program to the next level by expanding teacher recruitment and training, developing a summer program, developing an enhanced RE vision and strategy, and increasing intergenerational opportunities within RE.

**Goal 4: *Intensified Social Action.*** We will intensify our current engagement in social action both locally and globally by increasing participation and support among members and by developing intergenerational social action initiatives.

**Goal 5: *A More Visible Unitarian Universalist Presence.*** We will work to make Unitarian Universalism more visible within our community and our region, through our own outreach efforts, our support for the Mount Vernon and Cape Girardeau congregations, and development of a stronger Unitarian Universalist presence at SIUC.

## The Resources We Need

**Existing resources.** Our most important existing resource is the *strong sense of community* embodied in our vibrant Fellowship. The *commitment, dedication and leadership* – offered by our lay leaders, our minister and director of religious education – keep our institution “ticking.” Our *collective generosity and dedicated efforts* have resulted in the *new facility* that serves both as our Fellowship’s home and as a resource we share with the larger community.

**Additional resources.** To achieve the goals we have expressed as a congregation, we will need to add several key resources. In the second year, a *part-time administrator* needs to be added to the staff. In the third year, a well-qualified *religious education consultant* will lead us in identifying the enhancements we want to see in our children's RE programs. In the fourth year, we anticipate that a *part-time music professional* will be hired. We will be able to afford these additional resources with our projected rate of 5 percent net membership growth annually and a 5 percent annual increase in our average pledge. The plan also calls for a major fund-raising event each fall targeted at a specific goal for the Fellowship (even-numbered years) or for a social justice cause “beyond these walls” (odd-numbered years).

We look forward to working with all of you to make these visions a reality.

*2006 Strategic Planning Committee:* Chris Lant (Chair), George Feldhamer, Jerry Molumby, Astrid Mosely, Bill Sasso, Nillofur Zobairi

# *Carbondale Unitarian Fellowship*

## *Strategic Plan: 2006 – 2011*

### **Introduction to the Plan**

Our Fellowship has long been blessed by clear thinking and a spirit of pragmatic optimism. This Strategic Plan provides a "road map" that identifies a set of destinations (goals) and the general directions we will take to reach those destinations (objectives). It does not bind us to achieve specific targets by specific dates. Rather, it provides a vision that guides our decision-making in light of our collective goals, schedules major actions in light of priorities and interactions among goals, and captures where we as a congregation "want to go."

After describing five major goals and more specific objectives associated with each goal, this plan summarizes the critical resources presently available to us, and highlights those we need to acquire in order to achieve our shared goals. This Plan will be reviewed annually by the Board of Trustees so that progress can be assessed and specific actions can be adjusted as circumstances change. The congregation as a whole will also assess progress toward achieving the goals and objectives described and reassess them in the third year of the Plan (2008-09).

### **The Planning Process**

The process of developing this strategic plan originated in our previous strategic plan, adopted in May, 2001, to guide our efforts from July, 2001, through June, 2006 (the "2001 Plan"). That plan describes how we recognized a need for a long-term planning process in 1992. At that time, we faced concerns about the adequacy and structural integrity of our previous building and considered the possibility and advisability of calling a minister. In 1995, we voted to move out of the Elm Street building; one year later we purchased the land where our current building now stands. Before constructing the new building, we engaged a part-time Director of Religious Education in 1997, and secured full-time professional ministry in 1999, while working towards increased membership, an enhanced RE program, and greater social action.

Developed over a six-month period, the 2001 Plan was based on extensive input from the congregation, and named five congregational goals: Growth and Diversity in Membership, Congregation as Community, Personal and Spiritual Growth, Religious Education, and Social Action. It further identified significant resources that were regarded as necessary to achieve the goals: continued full-time ministry, a new facility, a part-time administrator, and increased resources for Religious Education, Music, and Social Action.

Like the 2001 Plan, this Strategic Plan (the "2006 Plan") also reflects extensive input from Fellowship members and standing committees. The Board of Trustees appointed an ad-hoc Strategic Planning Committee with the charge "to develop a Strategic Plan for the Carbondale Unitarian Fellowship for the period July 1, 2006 through June 30, 2011 that captures the congregation's vision of its own future, that addresses major issues represented by the various committees, that identifies priorities, and that is coherent, feasible and acceptable to the congregation at the Spring meeting in 2006."

The Committee developed a planning process, and discussed that process with the Board. Development of the plan itself began with a congregational meeting on December 4, 2005, seeking input as to "institutional goals." Approximately 75 individuals attended (42 percent of the membership). This process was followed by a series of small-group meetings during January, attended by a total of 85 individuals (48 percent of the membership). In the small-group meetings more personal perspectives on important existing and future aspects of Fellowship life were explored.

In addition, we invited input from each of the standing committees and from the Fellowship’s children via the Religious Education Committee. Using the information from all these sources, a draft plan was formulated in March. Along with an Executive Summary, the draft strategic plan was placed on the Fellowship website for comments, and hard copies were distributed as well. In April, additional meetings were held to discuss and revise the draft version, and the Board presented this version to the congregation as the Fellowship’s 2006 – 2011 Strategic Plan at the annual meeting in May.

### **Status Report: What We Have Achieved from 2001 to the Present**

In 2001, the Carbondale Unitarian Fellowship (CUF) adopted the “2001 Plan”, which expressed five goals and identified various resources needed to achieve these goals, for the period July 1, 2001 through June 30, 2006. Table 1 below provides a summary of several growth goals and projections made in the 2001 Plan and describes where we actually stand with respect to them today. Although we have not completely achieved the ambitious membership goals set forth, we have achieved significant increases in membership growth and some modest growth in diversity. Our collective commitment and generosity have allowed us to expand our annual budget in support of these goals, and to complete the construction of our new fellowship building (despite the 2001 Plan’s wishful thinking that the building could be built for one million dollars). In fact, our projection of the congregation’s generosity – then considered pretty optimistic! – has proven to be well short of the mark. The 2001 Plan’s anticipated capital campaign of \$540,000 actually yielded \$1 million, and \$1.4 million of the \$1.8 million construction cost has already been paid.

**Table 1.** Comparison of 2001 Plan’s Goals and Projections with Actual Achievements.

	<b>Income (\$K)</b>		<b>Members</b>		<b>RE students</b>	
	<i>Plan</i>	<i>Actual</i>	<i>Plan</i>	<i>Actual</i>	<i>Plan</i>	<i>Actual</i>
7/00-6/01	126	127	130	129	53	46
7/01-6/02	125	138	143	135	59	47
7/02-6/03	132	155	157	137	64	49
7/03-6/04	145	143 <sup>1</sup>	173	142	71	52
7/04-6/05	166	198	208	166	85	55
7/05-6/06	189	198(budget)	228	177 <sup>2</sup>	94	69

<sup>1</sup> Chalice Lighters grant for \$9800 was transferred from FY04 to FY05.

<sup>2</sup> As certified by the Board of Trustees in January, 2006.

Qualitatively, we have also made significant progress toward the goals we set in the 2001 Plan. In particular, we have made truly meaningful progress toward the goal to enhance our sense of “congregation as a community.” In fact, the success we have achieved with respect to the 2001 Plan largely results from, and is a tribute to, our success in building and strengthening our congregation as a community. We also feel that there has been considerable success in meeting the 2001 Plan’s goals for personal and spiritual growth, religious education, and social action. Of course, by their very nature, there is always potential for improvement in these areas, and this new strategic plan calls for further progress in these three central aspects of our Fellowship, as well as for continued focus on strengthening our community itself. In general, the 2001 Plan set the Fellowship on a journey that it has successfully traveled.

## The Goals to Which We Aspire: 2006-2011

**Goal 1: A Stronger and Deeper Community.** As we continue to grow, we will strengthen the sense of connectedness between all Fellowship participants. In particular, we will strengthen and deepen interactions between the Fellowship's newest and longest-term members, and those between children and adults.

To support this goal, we will continue to welcome new members and to nurture the sense of community, caring, and support that flows through our Fellowship, making it a place where we grow, where we are supported in our times of sorrow, and where we share our joy and energy. Our existing community, groups, and range of activities serve many interests and needs, and attract new members, including families with children of all ages. We will continue to recognize and celebrate existing and new members in a variety of ways, and to offer small and large group events that bring people together in respectful and non-judgmental interactions. Through continued social action and increased participation and visibility in the larger community, we will expand our sense of community with other groups and places.

**Objective 1.1: *Strengthening our Growing Fellowship.*** In the past five years, the congregation grew from 128 members in January, 2001 to 177 in January, 2006<sup>1</sup>, an annual average net rate of roughly seven percent. Over the next five years, we conservatively project continued growth at an average net rate of five percent. We will work to continue growth-oriented outreach efforts, recognizing that growth presents us with an ongoing challenge, as well as with opportunities to welcome, encourage, and energize more people as they share their lives and gifts with us.

One challenge of a growing membership is the development of meaningful connections that help newcomers find nurturing and stimulating places in the Fellowship's social and institutional fabric. An enhanced greeting process, more intentional recognition of new members, an active calendar of social events, and one-on-one and small-group interactions with the existing Fellowship community all represent opportunities in this area. New initiatives for social activities, especially those that foster new relationships between long-term and new members, such as mentoring, will be strongly encouraged. Current activities such as covenant groups, Supper Club, the membership dinner, and intergenerational potlucks that facilitate new member entry and connection will be continued. Our new photo directory will be periodically updated to help support this process.

**Objective 1.2: *Enhanced Intergenerational Opportunities.*** Beyond our current intergenerational opportunities, we will develop new ones, such as helping parents and teachers to participate in the coffee and conversation time after Sunday services, organizing intergenerational Fellowship retreats that are accessible to all Fellowship members, and offering group activities inclusive of families with young children. We will increase the availability of childcare during Fellowship events to encourage the participation of parents with younger children. These and other ideas will be developed in response to the needs and initiatives of our membership. Under the religious education and social action goals (below), we discuss additional intergenerational initiatives.

**Objective 1.3: *Increased Congregational Diversity.*** The modest success we have achieved to date in this area challenges us to work harder to increase the diversity of our congregation in terms of race, social class, sexual orientation, and political perspectives. The differences

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<sup>1</sup> These are adult membership numbers reported by the Fellowship to the Unitarian Universalist Association, and offer a consistent (and relatively conservative) data for comparison over time.

between us offer opportunities for personal growth, and we have a responsibility to make our faith community available to all who may be interested. Through programs that help us learn about and support different aspects of diversity (e.g., the Welcoming Congregation with respect to GLBT issues), we will work to embody not only our commitment to diversity but greater diversity itself. Achieving progress toward this objective poses a special challenge, one that will require intentional action and difficult change.

**Objective 1.4: *Improved Access to Information.*** Within the Fellowship community, we will develop effective new means of sharing information about the activity schedule, roles and responsibilities of various members, and opportunities for service (e.g. a “Help Wanted” column in CUF Links). We will consider suggestions for new ways to present event schedule information to achieve this goal.

**Objective 1.5: *Volunteer Service to Strengthen Our Community.*** Joint volunteer activities to achieve meaningful results, even committee meetings or cleaning and maintenance projects, when conducted in a spirit of togetherness inherently build our sense of community. For example, we will initiate a Fellowship Nurse Program including one or more professional nurses within the congregation to fulfill roles such as health educator, health councilor, referral advisor, health advocate, support group developer, integrator of faith and health, and volunteer coordinator for health related needs. Fellowship nurses do not administer medical procedures, but rather serve very broadly in response to the needs of the congregation in interfacing with the medical system. They help a person manage a medical condition in the context of their lives.

**Goal 2: *Personal and Spiritual Growth.*** As a theologically diverse congregation, the Fellowship will continue to enhance its offerings of resources for personal and spiritual growth within a safe and engaging place. Our goal is to enhance our ability to support and challenge our members as they work – individually and collectively – to better understand and satisfy their own personal and spiritual needs.

We will continue to cherish and honor our congregation’s heritage of freedom and reason as central values of religious community, while recognizing that those values themselves call us to remain ever open to new religious insight, perspectives, and practice. Our Fellowship’s broad range of members brings diverse intellectual, emotional, social, and spiritual needs to our community, enriching our fertile theological ferment and the broad set of growth-oriented resources available here.

We currently offer a wide variety of resources to support the personal and spiritual growth of our members. These include Sunday services, religious education (for both children and adults), inspiring music, social action opportunities, and myriad groups and programs serving spiritual, intellectual, aesthetic, entertainment, and other interests.

In support of this goal, we will continue to explore ways to stimulate our members and help them grow according to their needs. The Sunday Service Committee will continue to work with the minister to present services that speak to and engage the broad range of theological identities, perspectives, and needs present within the congregation. The Program Committee will continue to promote groups – both ongoing and newly forming – that encourage individuals to find the place best suited to nurture their growth and fulfillment.

**Objective 2.1: *Empowering Sunday Services.*** Our Sunday services will continue to reflect a strong foundation in Unitarian Universalism, and we will continue to weave engaging and stimulating elements into the rich tapestries of our services. Sunday services currently explore diverse topics that speak to a variety of theological perspectives. Open

congregational involvement, intergenerational participation, and the perspectives of guest speakers add significance to the services. We will work to create even more engaging Sunday services that continue to reflect a strong focus on the underlying values of Unitarian Universalism, illustrating the deep meanings of our principles and their implications for our community and our individual lives. Sunday services will continue to create opportunities for spiritual enrichment as they challenge us with moral and ethical issues.

**Objective 2.2: *A Rainbow of Programs.*** We will continue to offer a broad palette of adult educational opportunities, maintaining the current strengths of our offerings, while adding new programs, including more “experiential” and “curriculum-based” ones, in response to the interests expressed by the membership

Our current set of opportunities for adult personal and spiritual growth fall into four types of programs: (1) presentation and discussion; (2) adult educational curricula; (3) experiential groups, and (4) social opportunities. Examples of current “presentation and discussion” programs include Open Minds, the Humanist Group, Serendipity, Kaleidoscope, the Readers’ Round Table, Psi Symposium, the Video Circle, the Opera Circle, and others. While these groups are ongoing, this category also includes special events organized around invited guest speakers, such as Rajmohan Gandhi in December, 2004, and Imam Abdul Haqq in October, 2005. Some of our current “curriculum-based programs” include the Our Whole Lives sexuality education program, Building Your Own Theology, and the Unitarian Universalist Roots history program. “Experiential groups” include the recently formed “Evenings of Prayer” and the Dzogchen meditation group. The play-reading group and the covenant group program also include some experiential dimensions, as well as some that cross over into the presentation and discussion category. Some social action opportunities, such as the Welcoming Congregation program, also include an experiential dimension. Social opportunities include coffee and conversation following Sunday services, the Supper Club, the women’s monthly lunch group (Carol’s Lunch Bunch), and the intergenerational potluck dinners. Also included here are special events such as the Membership Party (e.g., the 2006 “Fiesta”) and the Fellowship’s annual gathering for the kick-off of the pledge drive.

We will continue to offer opportunities for adult growth by presenting programs to heighten our understanding of diverse theologies and cultures. To do this, we will explore local resources, such as the faith communities of the Carbondale Interfaith Council, the international population of Carbondale, the Paul Simon Public Policy Institute, and other groups. We will take into account the desire expressed by our members for increased spiritual and inspirational experiences, and for explanation and application of our seven principles. We will also explore how our Fellowship library can most effectively serve the needs of the Fellowship.

**Objective 2.3: *The Spiritual Power of Music.*** As a Fellowship, we recognize the importance of music, both as a catalyst for spiritual experience and as an avenue for personal artistic expression. Our Music program leaders will continue to coordinate a broad variety of excellent music during Sunday services, including music provided by guest artists, talented members, and children of the Fellowship. The Music Committee will continue to nurture the presence of multiple musical venues and experiences within the Fellowship, such as the adult, intergenerational, and children’s choirs, the recorder ensemble, the children’s bell choir, the Unitarian Folk Orchestra, and others that may arise in response to the interests, talents, and energies of our members. To support this rich musical dimension of the Fellowship, this plan adds a part-time music professional during the 2009-2010 Fellowship year.

**Goal 3: *Enhanced Religious Education.*** Our Religious Education (RE) program will be deepened and strengthened through teacher development and planning initiatives that will enhance the quality of experience for children and adults.

The Fellowship currently has a vigorous, well attended RE program. Strengths of the program today include the leadership of the Director and RE Committee, a set of dedicated teachers, actively supportive families, and spacious facilities in our new building. These strengths are reflected in the recent increases in the number of children participating in the RE program.

Objective 3.1: *Expanded Teacher Recruitment and Training.* Over the next five years, the RE program will recruit new RE teachers, including at least a dozen who do not have children in the program. These new teachers will be appropriately prepared and equipped for this role, to ensure that both teachers and students enjoy meaningful interaction within the program.

Objective 3.2: *RE Program Development.* Beginning in 2006, we will offer RE programming throughout the summer for children through 4<sup>th</sup> grade, with the understanding that older children will always be welcome to attend the adult services. Over the longer term, beginning in Fall, 2008, the RE leadership, with the proposed assistance of a well-qualified consultant, will engage the congregation in a participative process of envisioning an even more stimulating and meaningful RE program, taking it to the next level it is capable of achieving. Our implementation of this vision will suggest components of pedagogy and fresh, new curricular elements.

Objective 3.3: *Intergenerational Opportunities within RE.* The current program of intergenerational opportunities, such as the middle-school Mentor Program, and the open invitation to parents to join their children for a Sunday morning in the RE classroom, will continue. In the next five years, we will work intentionally to create additional opportunities for interactions across the generations within the Fellowship community, such as educational programs, special events, and group outings.

**Goal 4: *Intensified Social Action.*** The Fellowship will strengthen its current commitment to “walking our talk” by working actively for change in the world. We will develop a greater understanding of social action as a means for us to grow as individuals and to make our UU values more present “beyond these walls.”

We are a caring community of individuals who want to connect with and respond to the needs of the community, the region, and the world. Today we are deeply involved in social action initiatives such as support for Aids relief in Africa, the New Day Prison Ministries, and the Rainbow Café. We actively support ongoing local relief efforts such as Good Samaritan Ministries, as well as seasonal programs such as “Spirit of Christmas.”

We will continue our strong commitment to these social action efforts and projects, and to others as the need arises locally, nationally, and globally. To broaden our understanding, we will invite guest speakers to enlighten us on specific social justice topics, informing us of both the need for action and how our efforts are helping. We will strengthen our collaborative relationships with organizations such as SIUC’s Paul Simon Public Policy Institute, the Carbondale Interfaith Council, the Unitarian Universalist Service Committee, and other groups committed to social action congruent with UU principles. By continuing to promote respect for diversity of all kinds—theological, ethnic, sexual, and intergenerational—within our Fellowship and elsewhere, we will be instrumental in promoting social justice and social action.

Objective 4.1: *Fellowship-wide Participation.* During each of the next five years, members will be encouraged to participate in at least one Fellowship-sponsored social action project, enhancing our sense of community and creating meaning in our lives as we work together to form a better world. Our congregation will earn greater respect within the community

and the region for the positive impact of these projects.

Objective 4.2: *Intergenerational Social Action Programs*. In collaboration with the DRE and RE Committee, the Social Action Committee will develop social action projects that facilitate meaningful participation by people of all ages, (e.g. the “Empty Bowls” project).

**Goal 5: A More Visible Unitarian Universalist Presence.** The good news of Unitarian Universalism deserves to be more widely known throughout our community and our region. With General Assembly coming to St. Louis in June, 2006, and new congregations forming in our vicinity, we have several unique opportunities to increase our movement’s local and regional visibility. With a large university at our doorstep, we hear the call to be more visible and present to the entire campus population -- students, staff, and faculty. We recognize that this added visibility will enhance our strength as a congregation.

Objective 5.1: *Supporting New UU Congregations*. The Fellowship will continue to support newly-forming Unitarian Universalist (UU) congregations in the region, such as those in Cape Girardeau and Mt. Vernon. These new congregations provide a unique opportunity to expand the influence and values of Unitarian Universalism in the region, and their presence strengthens our sense of connection with our larger movement.

Our support for these congregations will be developed through continued dialogue with them, and will be oriented towards the needs they articulate. In addition to organizing periodic meetings with representatives of these groups, and helping to coordinate and administer a Chalice Lighters grant proposal (and associated local fundraising), we will continue to provide professional and support services as we are able.

Objective 5.2: *Greater UU Visibility in Carbondale and the Region*. In conjunction with the June 2006 UUA General Assembly in St. Louis, the UUA has invited local congregations to collaborate in an integrated marketing campaign, including campaigns in several different media. We propose to use this as a “jumping off point” for development of a visibility plan for the Fellowship and the new congregations in Cape Girardeau and Mount Vernon. We anticipate that this will include not only advertising, but also publicity in support of our social action efforts, and our programming in support of personal and spiritual growth. We will apply for a Chalice Lighters grant in support of this objective in the 2008/2009 time frame.

Objective 5.3: *Campus Presence at Southern Illinois University Carbondale*. With SIUC at our doorstep, we possess an opportunity and a responsibility to create a stronger presence for Unitarian Universalism and liberal religious values on that campus. Understanding campus ministry as relating to the entire campus community – students, staff, faculty, and administration – we will expand our campus presence, identifying and equipping adult facilitators, re-activating the registered student organization, acquiring resources that enable us to present programming (such as guest speakers and workshops), and increasing the number of self-identified UU students on the campus.

### **Resources Needed to Achieve These Goals**

**Existing Resource A: *Congregation as Community*.** Our community – our collective sense of commitment to the Fellowship and to each other – is our most basic and fundamental resource. We are a caring, welcoming community, and we communicate that caring in many ways. To many the Fellowship feels comfortable and homelike; others would like even more of a family

atmosphere in which to get to know people better. We will maintain this resource through our intentional efforts to strengthen it in Goal 1 above.

**Existing Resource B: *Dedicated and Committed Leadership.*** The Fellowship has a legacy of active leadership going back to its formation. Over the years, members have nurtured our community, organized our Sunday services, taught our children, worked for the good of our community and our region, and maintained our buildings and grounds. In short, our volunteers have done whatever our thriving religious community needed. This tradition of active involvement has continued even as we have added a director of religious education and a minister, allowing our staff to use their special training and skills to the best service of the congregation, while making significant use of the talents and energy of all our members.

This willingness of our members to share their talents and energy makes it possible for us to provide many different programmatic offerings and to undertake our multiple social action initiatives while the congregation's essential business continues. These talents include leadership, artistic ability, musical talent, organizational skills, and others that surface as needed. We recognize this as a major strength of the Fellowship, and will support and nurture it as we continue to grow.

**Existing Resource C: *Committed Ministerial Leadership.*** Bill Sasso, our minister, has been with the Fellowship for six years and is the first called minister in the 50 year history of the Fellowship. He has been a valuable resource to every aspect of the Fellowship. In addition to presenting sermons on Sunday, he has provided pastoral counseling and trained several members to provide pastoral services in his absence. He has provided valuable insight to whatever committee meeting he attends, often acting as the connecting link across many of the Fellowship functions. He provides a Fellowship presence to many of the other churches and groups in the community, often taking a leadership role. He also participates in UUA committees on the district and area level, representing the Fellowship and returning valuable service. He has navigated a shared ministry with this Fellowship, maximizing its volunteer tradition, being a catalyst, resource and leader, as needed. Our minister will continue to provide the above valuable functions through a conscious shared ministry, assisting the Fellowship to achieve all of the goals articulated throughout this Plan.

**Existing Resource D: *Religious Education Leadership.*** Roy Sumner has provided leadership to the religious education program and volunteers for the last seven years. He has acquired a wealth of experience in volunteer recruitment and training as well as knowledge specific to Unitarian Universalist religious education, including the Our Whole Lives program and the several Renaissance modules. Summer programs have flourished and are expanding yearly. We have set the stage for achieving the goal of a model program identified in the previous Strategic Plan.

**Existing Resource E: *Our New Facility.*** Our new facility provides an attractive and comfortable environment in which we gather for Sunday services, religious education, programs and meetings, rites of passage, and social interaction. A wide range of public events and programs, from pre-school to chamber music concerts, allows the larger community to share the blessings of this resource. To care for this facility, our planning needs to consider not only ongoing costs, such as insurance, utilities, and routine maintenance, but also the means to fund long-term maintenance requirements.

**New Resource F: *Professional Administrative Support.*** The administrative work of the Fellowship is at present undertaken by volunteers. As our membership has grown, and as programs, services, and responsibilities expand, the need for paid administrative support has become increasingly evident and urgent.

In support of our goals, we will hire professional administrative support in the 2007/2008 year, to include duties such as coordinating congregational administration, scheduling building facilities and events, supporting membership development, and assisting the minister, DRE, Board of Trustees, and committees. The details of this new position will be defined by the Personnel Committee under the supervision of the Board of Trustees. Funding this new position will require increased revenue, but we are confident that the value provided will be well worth the expense.

At the same time, Fellowship members who volunteer to help with various Fellowship duties and tasks will always be welcome and appreciated as they continue to provide a necessary and critical function. Their labors of love will complement the work of the office professional; we see this new position as facilitating and structuring the work of those volunteers, rather than replacing it.

**Enhanced Resource G: *Enhanced Support for Religious Education.*** Our Religious Education program at present provides our children and youth with many excellent opportunities for discussion and exploration, and with a variety of experiences. However, our aspirations reach even further – we would like additional teachers, expanded and enhanced RE offerings, more flexible scheduling for middle and high school students, and RE program offerings throughout the summer.

In support of this goal, we will engage the services of an experienced UU RE consultant to lead us in a congregational process of identifying and creating our RE program of the future. After that visioning and planning process, projected for the 2008-2009 Fellowship year, we will be better able to understand what resources are most critical to this important dimension of our Fellowship's life.

**New Resource H: *Professional Leadership in Music (c. Autumn, 2009).*** As our growth in resources allows, a part-time professional musical director will be hired to continue the development and enhancement of the Fellowship's music programs. We hope to be able to add this position in autumn, 2009. We anticipate that this position will be defined in detail by the Personnel Committee in consultation with the Music Committee, under the supervision of the Board of Trustees, and will be presenting for congregational vote at the Spring 2009 congregational meeting.

**Enhanced Resource I: *Financial Resources.*** The foundation of Fellowship finances is the member pledge. Members respond generously to the needs of the Fellowship each year during the annual pledge drive. The sum of 102 pledges for 2005-2006 was \$174,000; for 2006-2007 it was about 170,000 as of this writing. The projection for the next five years is a five percent increase in members and a five percent increase in the average pledge (See Strategic Plan Projected Budget).

The remarkable growth of the Fellowship over the last ten years has come from additional revenue beyond the annual pledge. A Futures Fund helped purchase land, a Ministerial fund helped build the budget to a level to support a minister, an Extension Ministry grant from the UUA supplemented the budget for the first three years of our new minister, two Chalice Lighter grants assisted with the support for the minister and the mortgage, and two UUA grants helped to initiate and support the Rainbow Café. Finally, a very successful capital campaign resulted in a beautiful new building.

Over the past ten years, we have been quite successful in fundraising, focusing major efforts on specific, tangible goals that have received generous congregational support. Building on this success, we will employ three strategies to “jump-start” Fellowship projects proposed within the annual budget, build assets in support of long-term financial security, and create seed funding for future initiatives. First, we will secure grant funding for social action projects,

promoting UU values throughout southern Illinois. Second, we will organize a special Fellowship fundraising event each autumn. Third, by building the Endowment Fund, we will be better able to internally support future Fellowship initiatives. The Endowment Fund was established in 2003, and currently includes the Noble Kelley bond fund and a social responsibility mutual fund. An Endowment Committee is currently planning ways of ensuring the opportunity for endowment best meets the personal and group needs of the congregation.

The second strategy, the autumn Fellowship fundraiser, may deserve greater explanation. As currently envisioned, it may take a different form each year. One year it might be a "talent auction," in another year an art auction, or a yard sale, or a concert. At our May business meeting, we will vote on a specific proposal to direct the proceeds of the fall fundraising event to a particular purpose. These proposals will be presented by the Board of Trustees. Given the very generous and timely anonymous "matching donation" of \$100,000 recently offered, the Strategic Planning Committee proposes that the focus of the autumn, 2006, fundraiser be to include a larger portion of the membership as owners of our new facility. While all will be welcome to contribute, the campaign itself will be focused on those one-third of members who were not part of the capital campaign that funded our new building. This will greatly reduce mortgage expenses, giving us more flexibility in our operating budget.

In future years, this fall fundraiser will target a social action goal in odd-numbered years (e.g. AIDS/Africa relief) and a Fellowship-specific target in even-numbered years. Specific goals will be identified by the Board of Trustees.