



FIRST UNITED CHURCH OF OAK PARK
an open community united in love & justice

Integrated Strategic Plan

Approved by Council 08.15.17

2017 – 2020

Integration of Strategic Plan and APT Action Plan
Recommendations

Vision 2020

- Moving from Words to **Witness**
- Moving from Individualism to **Intimate Fellowship**
- Moving from Charity to **Changing Structures**

Mission Statement

*“An open community
united in love and justice.”*

Values

- **Spiritual Exploration:** Nurtured by the grace of God, and caring for one another, we are on a faith journey together.
- **Faith Formation:** We challenge and strengthen our Christian faith formation through biblical teachings and spirited discussions.
- **Inclusion:** We value differences and respect all experiences as we lift the power of many voices and ideas.
- **Social Justice:** Empowered by the grace of God and following the example of Jesus Christ, we speak our truths and beliefs as we challenge and change social and cultural structures that perpetuate unfair and unjust impact.
- **Community:** Build a faith community where congregation members work together and support each other toward common goals.
- **Celebration:** With a generosity of spirit, we rejoice in our love of God, our community, and one another.

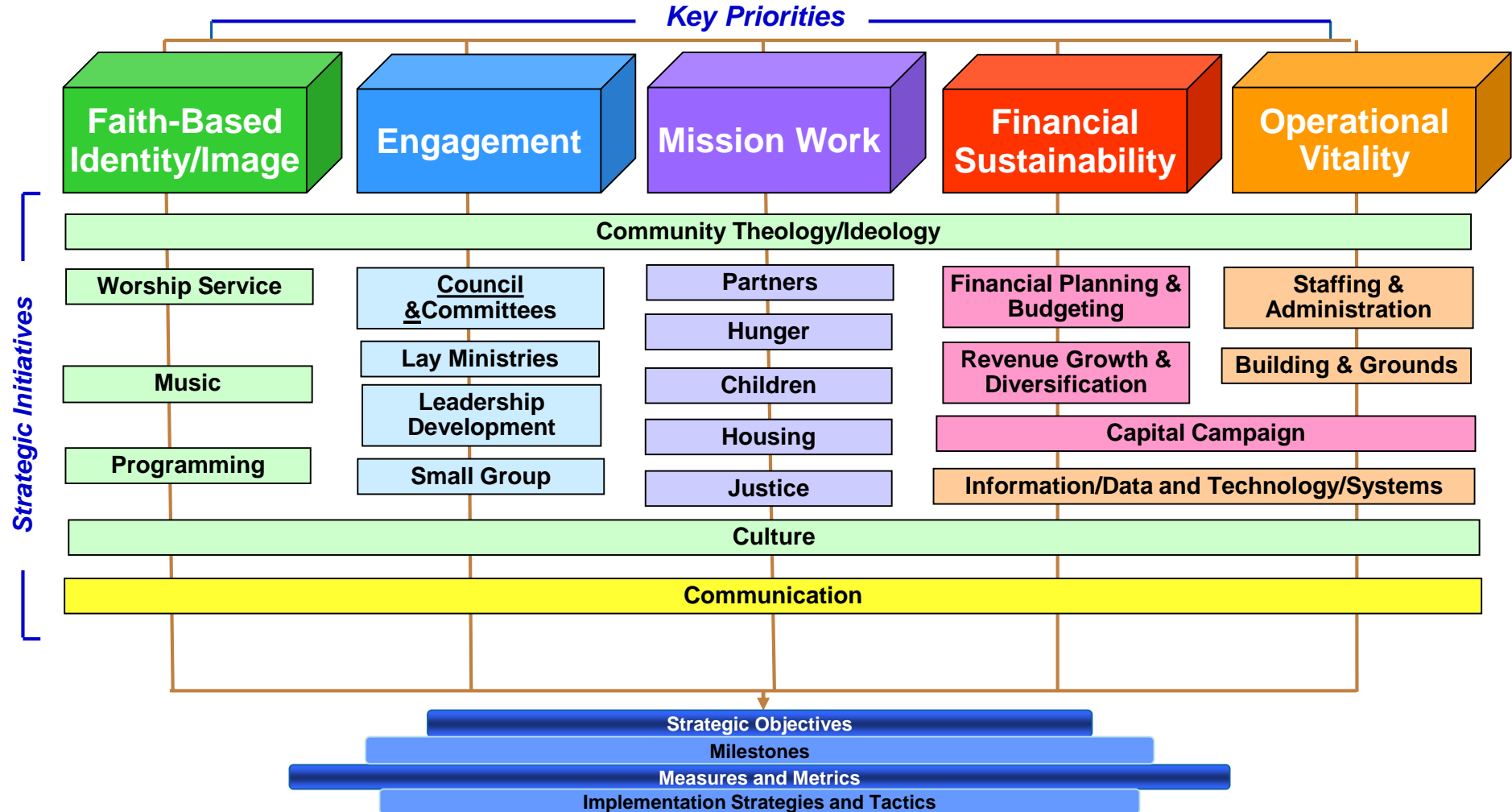
Key Strategic Components

Strategic Framework

Mission An open community united in love and justice

Values

- Spiritual Exploration
- Faith Formation
- Inclusion
- Social Justice
- Community
- Celebration



Descriptions: Key Priorities

Faith-Based Identity/Image

Description: Our church identity, rooted in our Christian faith, is both internal and external, and is committed to the pursuit of spiritual, intellectual and personal growth grounded in celebration, self-reflection and social justice. That means providing an inclusive, welcoming and engaging faith community and experience that challenges and equips our members to discipleship, service and responsible citizenship in the community, region and world. The achievement of this may require outside resources, communication structures and systems, open minds to embrace change and experimentation, and an actively engaged Worship committee.

Engagement

Description: This is about how 'The Church' grows and cares for its family, promotes fellowship and relationship building, and membership engages with 'The Church'. It takes a community, church, family and congregation (including staff and leadership) to want to work together and create a sense of belonging. This means creating multiple and flexible pathways/opportunities to become engaged with the church and strengthening church leaders with the intention of deepening relationship and broadening involvement. Several things may be required e.g. an investment in committee structure, small groups, meeting discipline; a communication infrastructure, systems, messaging and campaign; leadership training and tools; investment in website and social media.

Mission Work

Description: It's about seeking to be God's actor in the world, bringing people together to serve God and to have greater impact collectively, and working for systemic and structural changes in our designated mission areas. Writing checks, investing resources and personal engagement with concrete actions and campaigns are all necessary to make a measurable impact. Effectively leveraged, strengthened and utilized mission partnerships will be key. Several kinds of investment are needed: increased monetary, congregational involvement, sponsored activities, physical infrastructure and staff coordination of activities; along with solid decision criteria for church investment in mission activities.

Financial Sustainability

Description: This is about the systems that inform financial health (planning and budgeting), the reports that track progress and the means (diversified revenue) which feed the financial wellness and future of the church. It starts with a long-term financial plan complemented with a thorough budgeting process tied to the mission and strategic goals. The budget needs to fully recognize true 'costs and expenses', depreciation, while also preparing for capital needs. To lessen the dependence on pledges, a diversified revenue plan needs to be developed, along with rebuilding the budget and budget process. An in-depth analysis of church finances may be required. Ultimately, this requires Council and Pastoral leadership.

Operational Vitality

Description: Infrastructure, systems, personnel, physical space, technology and data ensure the church runs smoothly, provide staff and congregational support, allow for institutional knowledge, and position the church for growth and well being. Well-coordinated operational support keeps the lines of communication open in support of the mission, maintains the facility for accessibility and effectiveness, nurtures strong staff and leadership relationships, and provides critical information/data. To achieve this, technology needs to be updated and accessible (with appropriate training), staff may need restructured and trained, and investments in finance, operations and HR systems may be needed

Descriptions: Strategic Initiatives

Faith-Based Identity/Image
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Strategic Initiative: Community Theology/Ideology
<p>Description: Demonstrate an open and inclusive Christian ideology and theology that recognizes the common spirit and humanity of our members and celebrates our diverse backgrounds, experiences and perspectives. We are called to be a people who seek justice, love, kindness and walk humbly with God. This calling compels us to make mission a priority, challenge members of our church family to serve faithfully in ways that enrich the lives of others and connects us more deeply to God and each other.</p>
Strategic Initiative: Worship Service
<p>Description: To have an inclusive worship service that appeals to a range of spiritual, intellectual, cultural and personal styles. Celebrating our Christian faith in a worship experience that demonstrates our church's commitment to social justice, mission and diversity, and allows us to continue our faith work throughout the week.</p>
Strategic Initiative: Music
<p>Description: To have music that celebrates our Christian faith, demonstrates our diversity and inclusion, reflects our mission values, leverages our internal talents, respects past traditions and introduces members to a multitude of styles and genres.</p>
Strategic Initiative: Programming
<p>Description: Deepen and diversify our programming, aligning with our mission values, and providing members with opportunities for intellectual, spiritual and personal growth.</p>
Strategic Initiative: Culture
<p>Description: Be inclusive of all of God's children and celebrating differences and diversity of backgrounds, experiences and perspectives. Driven by our open and supportive love of one another on the faith journey, we create and nurture a culture of caring, and we are lead by a social justice mission to serve those with no voice and to change structures to empower all.</p>
Communication:
<p>Description: Create avenues of open, transparent communication through diverse systems and opportunities, with and between the congregation, lay leadership, pastoral leadership, staff and surrounding community.</p>

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<p>Strategic Initiative: Committees</p>
<p>Description: Align committees and their structure with the strategic priorities and goals of the church, creating consistent, effective and standardized processes, and decreasing barriers for diversified involvement and leadership. Make it easy to engage and contribute.</p>
<p>Strategic Initiative: Lay Ministries</p>
<p>Description: Create and diversify lay ministry opportunities for church members and provide participants with necessary support and training. Led by our Deacons, strengthen lay ministry in order to provide members with needed spiritual and pastoral care.</p>
<p>Strategic Initiative: Leadership Development</p>
<p>Description: Provide tools and skill building training to develop a sustainable source of lay leadership within the congregation. To provide multiple pathways to lay leadership opportunities for members of the congregation.</p>
<p>Strategic Initiative: Small Group</p>
<p>Description: Create multiple opportunities for small group development that reflects the wide range of needs and topics within the congregation for spiritual involvement and engagement.</p>
<p>Strategic Initiative: Culture</p>
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Strategic Initiative: Partners	
Description:	Strategically partnering with outside organizations, including current mission partners, in order to leverage and deepen the impact of our church's work in hunger, children, housing and justice.
Strategic Initiative: Hunger	
Description:	Address basic access to food and water, providing sustainable food sources, and promoting economic independence.
Strategic Initiative: Children	
Description:	Support efforts that educate, provide for basic needs and support the well-being of children through local, national and international efforts.
Strategic Initiative: Housing	
Description:	Provide people with services and support needed to move from homelessness to stable housing while advocating for affordable housing policies.
Strategic Initiative: Justice	
Description:	Promote basic civil rights and human dignity within our local community, our nation and the world.
Strategic Initiative: Culture	
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Strategic Initiative: Financial Planning & Budgeting
<p>Description: Create systems/processes, structures, policies and plans for a stable financial future and budget. Building rigor and discipline into budgeting and reviews.</p>
Strategic Initiative: Revenue Growth & Diversification
<p>Description: Create a plan for stewardship and congregational investment as well as revenue diversification that leads to financial stability.</p>
Strategic Initiative: Capital Campaign
<p>Description: Create a dynamic capital campaign that encompasses the vision of the church and our mission work. The resulting campaign, aligned with the Building & Grounds plan, improves and leverages both the building and capital structure.</p>
Strategic Initiative: Information/Data and Technology/Systems
<p>Description: Create consistent and improved technology and information systems that allow the church to strategically use data for decision-making, support church-wide needs, and grow and update with the church.</p>
Strategic Initiative: Culture
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Strategic Initiative: Staffing & Administration
Description: Align pastoral and administrative staff positions with the strategic goals and mission of the church. To create a supportive, professional environment for staff to work together and be effective in meeting the needs and goals of the church.
Strategic Initiative: Building & Grounds
Description: Create a Building & Grounds long term plan that supports the creation and maintenance of a building and surrounding grounds that is healthy, effective and meets the broad needs of the church and the surrounding community.
Strategic Initiative: Capital Campaign
Description: Create a dynamic capital campaign that encompasses the vision of the church and our mission work. The resulting campaign, aligned with the Building & Grounds plan, improves and leverages both the building and capital structure.
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1 and 3 Year Goals

By Key Priority and
Strategic Initiative

By Key Priority: 1 and 3 Year Strategic Goals

KEY PRIORITY	2017/2018	2019	2020
Faith-Based Identity/Image	<ul style="list-style-type: none"> - <u>Create the framework that nourishes the spiritual life of the congregation (#4-8)</u> - Increase membership/congregation size by 5% - Increase regular attendance by 5% 		<ul style="list-style-type: none"> - <u>Maintain a framework that nourishes the spiritual life of the congregation (#4-8)</u> - Increase membership/congregation size by 20% - Increase regular attendance by 20% - Diversify composition of congregation
Engagement	<ul style="list-style-type: none"> - <u>Create “culture of care” plan that engages Pastoral staff, Deacons, lay ministries & congregants bring FU’s values to life.</u> - Redefine congregation engagement Opportunities at all levels - <u>Create a “Statement of Congregant Responsibilities” (#4-5)</u> - Identify leadership skill building and training needs and develop a plan 		<ul style="list-style-type: none"> - Enthusiastic and fulfilling congregant engagement and participation - Executed curriculum of leadership development for all lay leadership, committee co-chairs and potential leaders - Budgeted training for leadership development
Mission Work	<ul style="list-style-type: none"> - Increase financial support for mission work through 5% of member pledges - Establish a metric for in-kind contributions from First United that support in-house mission work - Identify at least 3 societal structural barriers to impact/change within the 4 designated mission areas - Coordinate and collaborate all mission work of the church 		<ul style="list-style-type: none"> - Increase financial support for mission work through 15% of member pledges - Establish First United as the community faith leader and partner of choice in Oak Park (and surrounding communities) for our 4 mission areas - FUC has systematically impacted/changed at least 1 societal structural barriers
Financial Sustainability	<ul style="list-style-type: none"> - Gather historic/current data: records, trends - Establish baselines - Align budget with strategic plan - Increase revenue by 20% - Initiate steps toward capital campaign 		<ul style="list-style-type: none"> - Financial wellness and increased financial acumen/competencies - Implementing a financial plan for stability and growth
Operational Vitality	<ul style="list-style-type: none"> - Analyze and submit recommendations to improve/upgrade the church’s current data system, technology and overall systems 		<ul style="list-style-type: none"> - Major financial and operational systems are informed by church data, with tracking, reporting and accountability

By Strategic Initiative: 1 and 3 Year Strategic Goals

KEY PRIORITY	2017/2018 Goals	2019	2020 Goals
Faith-Based Identity/Image	<ul style="list-style-type: none"> - <u>Create the framework that nourishes the spiritual life of the congregation (#4-8)</u> - Increase membership/congregation size by 5% - Increase regular attendance by 5% 		<ul style="list-style-type: none"> - <u>Maintain a framework that nourishes the spiritual life of the congregation (#4-8)</u> - Increase membership/congregation size by 20% - Increase regular attendance by 20% - Diversify composition of congregation
Worship Service	<ul style="list-style-type: none"> - Develop inclusive and varied worship services <u>that reflects the actual and desired diversity* of our congregation (#4-3, #4-7b, c, d)</u> - Strengthen Worship Committee: create mission, job description, communication plan with congregation, and one-year action plan based on data gathering findings - Intentionally relate worship service with congregational growth 		<ul style="list-style-type: none"> - Congregation satisfaction level above 75% - Every worship service includes a lay participant - Physical space engaging for children, youth and adults in worship space during service - Full-sensory services
Music	<ul style="list-style-type: none"> - Create an inclusive and varied music plan, together with pastors, the Worship Music & Arts Committee, and Music staff <u>that reflects the actual and desired diversity* of our congregation and surrounding communities (#4-3, #4-7a)</u> 		<ul style="list-style-type: none"> - Congregation satisfaction level above 75%
Programming	<ul style="list-style-type: none"> - Create education and program plans for both youth and adults based on data gathering findings - <u>Create programming and activities that encourage us to explore values of diversity* and inclusion (#4-3) and explores diversity of viewpoints in a respectful, safe environment (#4-9)</u> 		<ul style="list-style-type: none"> - Implementation of education and program plans

By Strategic Initiative: 1 and 3 Year Strategic Goals

KEY PRIORITY	2017/2018 Goals	2019	2020 Goals
Engagement	<ul style="list-style-type: none"> - <u>Create “culture of care” plan that engages Pastoral staff, Deacons, lay ministries & congregants bring FU’s values to life.</u> - Redefine congregation engagement Opportunities at all levels - <u>Create a “Statement of Congregant Responsibilities” (#4-5)</u> - Identify leadership skill building and training needs and develop a plan 		<ul style="list-style-type: none"> - Enthusiastic and fulfilling congregant engagement and participation - Executed curriculum of leadership development for all lay leadership, committee co-chairs and potential leaders - Budgeted training for leadership Development
<u>Council & Committees</u>	<ul style="list-style-type: none"> - <u>Clarify roles, responsibilities, and decision-making authority of Lead Pastor, Council, Personnel Committee, Pastors, Staff, Committees (#3-2, #3-3)</u> - Council examines and establishes committee structures with an eye toward consolidation - Council formalizes committee structures - All committees are defined along with their intended impact - Create an organization chart of committees linked to the strategic framework 	<ul style="list-style-type: none"> - <u>Establish process to increase clarity & awareness of blended UCC/Presbyterian by-laws and procedures (#3-1)</u> 	<ul style="list-style-type: none"> - Effective Committee work through rigor, discipline and use of meeting skills and tools - Chair and Vice-Chair positions and term limits established for all Committees for succession planning
Lay Ministries	<ul style="list-style-type: none"> - <u>Create a “Statement of Congregant Responsibilities” (#4-5)</u> - Define and outline lay ministry program plan - Assess congregant lay ministry needs - <u>Support & strengthen the Deacon ministry (#4-1)</u> - Create “culture of care” plan that engages Pastoral staff, Deacons, and other lay ministries 		<ul style="list-style-type: none"> - Lay ministry program coordinated with needs of church - Fully implement “culture of care” plan
Leadership Development	<ul style="list-style-type: none"> - Define leaderships positions for leadership development/training - Identify leadership development needs of lay leadership and committee co-chairs - Outline resources for identified leadership development (e.g. leader guides, #4-4) 		<ul style="list-style-type: none"> - Leadership training programs implemented for each major leadership position in church
Small Group (#4-2)	<ul style="list-style-type: none"> - Define and assess small group opportunities throughout church; identify overlaps and gaps - Create and implement small group development plan <u>with a focus on building intentional spiritual relationships</u> - Create a listing of all small groups 		<ul style="list-style-type: none"> - Offer robust small group opportunities

By Strategic Initiative: 1 and 3 Year Strategic Goals

KEY PRIORITY	2017/2018	2019	2020
Mission Work	<ul style="list-style-type: none"> - Increase financial support for mission work through 5% of member pledges - Establish a metric for in-kind contributions from First United that support in-house mission work - Identify at least 3 societal structural barriers to impact/change within the 4 designated mission areas - Coordinate and collaborate all mission work of the church 		<ul style="list-style-type: none"> - Increase financial support for mission work through 15% of member pledges - Establish First United as the community faith leader and partner of choice in Oak Park (and surrounding communities) for our 4 mission areas - FUC has systematically impacted/changed at least 1 societal structural barriers
Partners	<ul style="list-style-type: none"> - Create a plan with current mission partners (Housing Forward; OPRF Food Pantry, Cluster Tutoring) to match partner needs with congregant volunteer/engagement opportunities - Outline a 3-5 year building plan to support mission work inside church facilities and offsite - Create one meaningful advocacy or service partnership with one other faith organization in Oak Park or surrounding community for one of four mission pillar areas. 		<ul style="list-style-type: none"> - Create/join a meaningful advocacy or service partnership with multiple interfaith organizations (in Oak Park, Austin, and other surrounding communities) for at least one of our four mission pillar areas - Implement the 3-5 year building plan to support mission work inside and outside the church
Hunger	<ul style="list-style-type: none"> - Research and plan new mission project focused on hunger, including three-year budget for project, identification of local, national, and international roles, and defined congregant engagement opportunities. 		<ul style="list-style-type: none"> - Fully implement hunger mission project with organizational/community/congregational partner, with measurable impact goals
Children	<ul style="list-style-type: none"> - Research and plan new mission project focused on children, including three-year budget for project, identification of service and advocacy opportunities, and defined congregant engagement opportunities 		<ul style="list-style-type: none"> - Fully implement children project with organizational/community/congregational partner with measurable impact goals
Housing	<ul style="list-style-type: none"> - Co-sponsor one refugee family - Identify multiple congregant engagement opportunities with Housing Forward and New Moms - Identify one additional housing-focused organization to be supported - Identify and promote opportunities to ensure that Oak Park remains a fully integrated community with affordable housing in all new developments 		<ul style="list-style-type: none"> - Complete co-sponsorship one additional refugee family - Complete assessment/evaluation of FU's Housing efforts to address homelessness, congregational engagement, and make changes - FUC has been successful in adding affordable housing in all new developments.
Justice	<ul style="list-style-type: none"> - Create concrete criteria for "Justice" projects - Create one partnership with Austin congregation or nonprofit on issue of gun violence - Create action/resistance plan on religious persecution (e.g. protest team, letter-writing, registration action, etc.) - Identify multiple congregant engagement opportunities 		<ul style="list-style-type: none"> - Fully implement gun violence prevention project with organizational/community/congregational partner, with measurable impact goals

By Strategic Initiative: 1 and 3 Year Strategic Goals

KEY PRIORITY	2017/2018	2019	2020
Financial Stability	<ul style="list-style-type: none"> - Gather historic/current data: records, trends - Establish baselines - Align budget with strategic plan - Increase revenue by 20% - Initiate steps toward capital campaign 		<ul style="list-style-type: none"> - Financial wellness and increased financial acumen/competencies - Implementing a financial plan for stability and growth
Financial Planning & Budgeting	<ul style="list-style-type: none"> - Revamp the budget to align with strategic plan - Restructure the budget process and consider aligning with election of new officers and program year - Institute monthly reporting to Committee on finance/budget (Year-to-Date Actuals) - Create 3-5 year financial plan for church - Execute the first audit 		<ul style="list-style-type: none"> - Implement and communicate 3-5 year financial plan for church - Implement audit system
Revenue Growth & Diversification	<ul style="list-style-type: none"> - Develop revenue growth plan with revenue diversification goals - Redesign Stewardship Campaign and integrate into budgeting process 		<ul style="list-style-type: none"> - Increase revenue to \$1.3MM annual <ul style="list-style-type: none"> * Pledge dollars: \$900K * Other sources: \$400K - Acquire two foundation grants
Capital Campaign	<ul style="list-style-type: none"> - Identify revenue for immediate building fixes - Identify and engage Capital Campaign consultant - Conduct Capital Campaign feasibility analysis 		<ul style="list-style-type: none"> - Implement \$5MM Comprehensive Capital Campaign <ul style="list-style-type: none"> * including creation of Building Fund and Mission component
Information/Data and Technology/ Systems	<ul style="list-style-type: none"> - Restructure online giving system - Create document retention and reporting system - Review and analyze ACS and Member Link systems 		<ul style="list-style-type: none"> - Create and fully implement giving tracking system - Create and implement user-friendly and accessible data system

By Strategic Initiative: 1 and 3 Year Strategic Goals

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Operational Vitality	<ul style="list-style-type: none"> - Analyze and submit recommendations to improve/upgrade the church's current data system, technology and overall systems 		<ul style="list-style-type: none"> - Major financial and operational systems are informed by church data, with tracking, reporting and accountability
Staffing & Administration	<ul style="list-style-type: none"> - Identify professional development needs - Conduct staff team building and leadership development engagement - Evaluate pastoral staffing level in alignment with strategic plan - Implement annual evaluation process of staff 		<ul style="list-style-type: none"> - Create and implement staffing structure in alignment with changing needs of the church - Create and implement professional development program for staff (pastoral and administrative) - Develop a succession plan for each pastoral and administrative position
Building & Grounds	<ul style="list-style-type: none"> - Conduct Building Structure Analysis (include Nursery School and Mission Partners) - Conduct Building Use Analysis, in alignment with church's needs, mission work, and strategic goals (include Nursery School and Mission Partners) - Explore possible offsite facilities 		<ul style="list-style-type: none"> - Create sustainable Building Fund - Create and execute comprehensive Building Plan
Capital Campaign	<ul style="list-style-type: none"> - Identify revenue for immediate building fixes - Identify and engage Capital Campaign consultant - Conduct Capital Campaign feasibility analysis 		<ul style="list-style-type: none"> - Implement \$5MM Comprehensive Capital Campaign <ul style="list-style-type: none"> * including creation of Building Fund and Mission component
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Community Theology/ Ideology	<ul style="list-style-type: none"> - Create roll out plan for communication of First United's Values 		<ul style="list-style-type: none"> - First United's Values are reflected in all communications, operation decisions, worship and programming
Culture	<ul style="list-style-type: none"> - Define desired state of FU's culture - Create "culture of care" plan that engages Pastoral staff, Deacons, lay ministries congregants that brings FU's values to life (#4-8) - Create and implement roll-out plan for strategic plan - <u>Provide & train leadership and congregation with tools to address the inevitable friction that accompanies change</u> 		<ul style="list-style-type: none"> - Open, transparent and inclusive culture throughout entire church - Living out values with a noticeable culture change - Fully implement "culture of care" plan
Communication	<ul style="list-style-type: none"> - Strengthen Communication Committee: create mission, define role, job description, communication plan with congregation, and one-year action plan based on data gathering findings - Create and implement a communications plan and systems between Council, Committee chairs, Committees, staff and congregation (build rigor and discipline of use) that functions and are timely (#2) - Implement healthy one-on-one communication skills for staff and congregation leaders (#2) - Fully use weekly bulletin, Messenger Bell, and other electronic communication tools, which may require training and increased access (#2) - Increase use of member portal by 25% - <u>Create and implement "Communication Values" to be used throughout the church – Council, Committees, Staff, Congregants) (#2)</u> 		<ul style="list-style-type: none"> - Open and transparent communication systems throughout the church