



Channing Memorial Church
Strategic Plan
2008-2018

To be submitted for adoption by the Congregation
at the Annual Meeting, 21 May 2008

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To readers of Revision 2, dated 22 April 2008:

This Strategic Plan is currently available to all members and friends of our congregation for review and comment. Previous versions were made available to the Governing Board as well as to our Minister and our Director of Religious Education, and Revision 2 reflects the feedback received to date.

Your inputs are most welcome! If you have comments or questions, please attend the Strategic Plan informational meeting on 29 April, 6 – 8:30 PM at the Channing Parish Hall, or contact Maryellen Doherty, Strategic Planning Team Lead, at 401-845-0273 or via e-mail at programs@channingchurch.org by May 2, 2008.

Introduction

What will our church be like in 2018? We are "Growing Together." Channing Memorial Church is a beacon of liberal religion in Newport, empowering its members to offer their unique gifts in service, offering inspiration, educational opportunities, and building community in ever wider circles.

During the 2006 – 2007 church year we held a series of congregation-wide discussions to assess where we are today and to develop a shared vision of where we want to go and what we want our church to be. The result was a vision statement and set of commitments to realize that vision. The assessment and the vision statement can be viewed as the end posts of a road marking a journey that the Congregation is beginning to take. Having defined the start and the finish, it is necessary to define the best road to take us to the finish – our vision of the future. This *strategic plan* accomplishes that purpose by defining goals and objectives that are consistent with our vision and our commitments, assigning responsibility for their accomplishment, and establishing milestone dates for their completion.

This strategic plan is not the final answer. Rather, it is a living document that can be used and shaped by leaders over the plan's period (2008 – 2018) to guide and promote the actions necessary to achieve our vision. It, therefore, should be reviewed biennially and modified as necessary in light of changing circumstances.

Our Vision and Commitments

Our Vision

Believing that the true expression of our religion is the way we live our lives –

We, the members and friends of Channing Memorial Church, commit to use our diverse gifts in shared ministry as a catalyst for:

Creating a wellspring of caring and compassion within a vital and inspirational community of all ages that values individuals throughout their lives,
Spiritual growth and intellectual exchange,
The honest and responsible use of the democratic process,
Stewardship of our historic sacred spaces,
Peace, justice, and respect for all people and our planet,
Positive change within our community and the world.

Commitments to Achieve our Vision

- i. We are committed to creating and sustaining a foundation for our children which fosters their spiritual growth, guides their search for truth and empowers them to work for justice.
- ii. We are committed to encouraging exploration of spirituality by each individual.
- iii. We are committed to promoting greater love and understanding among ourselves, in our community, in our country, and in the world.
- iv. We are committed to reaching out to and serving others in our community, our country, and the world.
- v. We are committed to shared ministry among our Minister, Staff, and Congregation to facilitate individual ministry and realize ministry together.
- vi. We are committed to maintaining and perpetuating this church as a memorial to the life and teachings of the Reverend Doctor William Ellery Channing, the founder of American Unitarianism, in Newport, Rhode Island, the town of his birth.
- vii. We are committed to providing welcoming space to support and promote our church's ministry and programs for those within the congregation and beyond.
- viii. We are committed to finding and providing the resources necessary to realize our vision.
- ix. We are committed to practicing Congregational polity; coming together in a spirit of friendship to forge consensus on important decisions and then empowering our Minister, our Staff, and our Lay Leaders to take action to implement those decisions and realize our vision.

Our Strategic Goals

The following goals provide the overarching direction for how we as a congregation will proceed in order to achieve our vision. These goals and objectives were derived from interviews with leaders in our congregation as well as from information gathered from the congregation at large during the Year of Decision (church year 2006-2007), and through questionnaires and interviews with leaders of the church's various working committees during 2007-2008.

1. **Nurture spiritual growth:** We will provide and increase opportunities to enrich the spiritual growth of our members of all ages.
2. **Cultivate membership participation:** We will promote the growth of our congregation, cultivating new members, volunteers, and church leaders while remaining mindful of the needs of current members.
3. **Engage within and reach out beyond our Channing community:** We will become a vital voice in the larger communities beyond our church by increasing our outreach, service, and social action efforts.
4. **Provide good stewardship of our property:** We will restore and maintain our buildings and grounds to a condition that will best facilitate the ministry and fellowship goals of the congregation.
5. **Act and communicate effectively in all congregation activities:** We will organize our governing and communications practices to serve our committees and the congregation at large most efficiently.
6. **Provide sufficient resources of money and staff:** We will develop a spirit of generosity and abundance that will creatively address the short- and long-term financial and staffing needs of the church, and provide the resources to achieve those needs.
7. **Measure our progress:** We will commit resources to establish and regularly use feedback mechanisms and tracking tools to measure our overall progress toward achieving our objectives, goals, and vision.

Note: These goals are numbered for reference purposes, not to indicate order or priority. These goals work synergistically toward our vision.

Goals and Associated Objectives

Objectives provide the stepping stones to achieve our goals and ultimately our vision.

Format

For each of the strategic goals, a number of objectives are identified. Objectives are written in the present tense to show the desired state once the objective has been achieved. Objectives are not presented in any particular order. Amplifying information related to an objective is provided as sub-bullets.

Most of our objectives represent ongoing initiatives, rather than one-time events. Many of the initiatives are familiar and already in progress to some extent. However, they are included in this strategic plan to ensure that the focus is maintained, since that is what is needed to achieve the associated goal and move toward our vision.

One of the key attributes of a “good” objective is that it’s clear when and if the objective has been accomplished. While some of the objectives below meet those criteria, others do not; in most cases, measurement methods need to be put in place to enable us to objectively assess progress in many areas. (Goal 7 supports this need.) However, the process of developing annual milestones for each objective as described below will ensure that progress is clearly defined and tracked.

Process

At the beginning of each church year, the Governing Board works with the committees, staff and the minister to determine which objectives should be adopted for the coming year and who has primary responsibility for each objective. As noted above, most of our objectives represent ongoing initiatives, so it is likely that some objectives will be newly adopted each year, while others will be already in progress. In either case, it is important for the assigned lead(s) to identify the approach to be taken in the coming year, as well as key milestones, so that progress can be measured and communicated. A template is provided at the end of this document to capture this information; the responsible lead will complete this form for submission to the Board by the October Board meeting.

Accountability

In order to assure timely implementation and review of this plan, Channing's Governing Board will:

1. Accept primary responsibility for the plan's execution
 - Assign implementation of Strategic Plan objectives to appropriate committees
 - Receive reports on progress at monthly Board meetings
 - Report progress relative to the Strategic Plan to the congregation at least quarterly.

The Board may designate a person or team to oversee execution of the Strategic Plan, including progress tracking.
2. Regularly update the Strategic Plan
 - Review the Strategic Plan at the Board Retreat in odd-numbered years.
 - Actively solicit comments and suggestions from the congregation in advance of these biennial reviews.

Strategic Goal 1: Nurture spiritual growth: We will provide and increase opportunities to enrich the spiritual growth of our members of all ages.

Objective A. Worship is one of the top reasons people visit and join Channing Memorial Church.

Objective B. Lifespan Religious Education is one of the top reasons people visit and join Channing Memorial Church.

Objective C. Channing Choir and Music Programs offer a variety of musical expressions and opportunities that enhance worship and encourage participation.

Objective D. Our Worship Committee actively develops Lay Led Services and invites Guest Speakers for the Sundays our minister is off.

Objective E. Children's Worship is offered regularly in an appropriate space.

Objective F. Our Adult Enrichment program has an active lay ministry team working with the minister.

Objective G. Our Family Ministry program engages families with children.

Objective H. Our Youth Ministry program engages youth ages 15 to 18.

Objective I. Our Whole Lives, comprehensive sexuality education, is offered for children, youth and adults.

Objective J. Spiritual Growth and personal development is an integral part of the training and support of RE Teachers and Facilitators.

- a. Qualified and interested adults who are not RE parents are regularly involved in RE activities.
- b. Qualified and interested men are regularly involved in RE activities.

Objective K. A Book Team manages and staffs an on-site Bookstore and Library, including coordination of donations.

Objective L. Workshops and retreats are held to develop and strengthen Shared Ministry.

Strategic Goal 2: Cultivate membership participation: We will promote the growth of our congregation, cultivating new members, volunteers, and church leaders while remaining mindful of the needs of current members.

Objective A. People in our congregation know each other and feel connected to each other and to the congregation as a whole through social programs, focus events, RE, caregiving and other means of reinforcing community.

Objective B. All members and friends are well-informed about opportunities for involvement in church activities as volunteers and participants, overseen by a volunteer coordinator.

Objective C. All current members and friends are actively serving in some aspect of congregational activities.

Objective D. Members can proudly articulate their reasons for choosing to be part of the Channing congregation.

Objective E. Channing has a clear “brand identity” that is consistently used for internal and external communications.

Objective F. We create a culture of hospitality and inclusion at all church events.

Objective G. All visitors receive timely follow-up contact from the Membership Committee and the Minister.

Objective H. Individual members have a clear understanding of each person’s role in introducing others to Unitarian Universalism and to our church community.

Objective I. All current, new and prospective members have a clear understanding of the expectations of membership.

Objective J. We develop new members, offering them time, support, and mentorship to discover what is important to each one about Channing; to forge friendships and a strong bond with our community; and to develop a strong sense of stewardship within the Channing community.

Objective K. Each committee establishes at least 2 goals each year to bring in and welcome new congregants to Channing.

Objective L. Members support the democratic process within our congregation by being well-informed about the congregation's activities and initiatives and by actively participating in congregational polity, including attendance at congregational meetings.

Objective M. We develop church leaders who have already forged strong bonds to our Channing community, and who are committed to working with dedication and in the spirit of stewardship to strengthen our community.

Objective N. Members empower Channing's leadership to act in accordance with our By-laws, and in alignment with UU principles and Channing's Mission and Vision statements.

Objective O. Channing has and follows a written Safe Congregation policy.

Objective P. The signage for our property and spaces provides clear information for visitors as well as members.

Objective Q. Members, friends and visitors can easily find a place to park.

Strategic Goal 3. Engage within and reach out beyond our Channing community: We will become a vital voice in the larger communities beyond our church by increasing our outreach, service, and social action efforts.

Objective A. Certain Channing programs are consciously designed to address local community needs and to encourage involvement by members of the local community.

Objective B. Channing continually strives to expand or add outreach programs such as the soup kitchen, the crop walk and 1Sky (formerly Step it Up).

Objective C. Children are involved in Social Action initiatives, such as soup kitchen and Crop Walk.

Objective D. Channing is certified as a Green Congregation by 2010 and conducts future appropriate green activities to maintain certification.

Objective E. Channing events and member perspectives are included in media regularly.

Objective F. Collaborative programming is increasing between our church and other local organizations and initiatives.

Objective G. The Social Justice Committee leads a Sunday service to highlight social action issues and opportunities at least annually.

Objective H. The Social Justice Committee reports social action activities and successes to the congregation using a variety of communication methods, including the Catalyst and Order of Service inserts on a monthly basis.

Objective I. As a Welcoming Congregation, we continue the work of becoming an open and affirming community for gay, lesbian, bisexual, transgender and straight people.

Strategic Goal 4. Provide good stewardship of our property: We will restore and maintain our buildings and grounds to a condition that will best facilitate the ministry and fellowship goals of the congregation.

Objective A. Our historic buildings and grounds are maintained routinely in sound and attractive condition so that they adequately serve the needs of Channing's programs.

Objective B. Our buildings and grounds comply with fire, safety, ADA and other regulatory requirements.

Objective C. Drainage issues from our buildings and our neighbor's property are resolved so that our buildings and walkways are not subject to consequential deterioration.

Objective D. Steeple restoration is completed by November, 2009, funded through a successful capital campaign and outside grants. (Note: This is also a part of the Property Master Plan. See Objective H below.)

Objective E. Our income properties are operated responsibly as a good landlord while maximizing income to Channing.

Objective F. The sanctuary is an inviting spiritual space.

Objective G. Suitable space is available for all of the congregation's programs and activities.

Objective H. The congregation approves a Property Master Plan¹ by the second half of 2008 as a primary resource for Board-level decision-making regarding the highest and best utilization of our property within financial constraints.

Objective I. A Capital Campaign succeeds in raising the funds necessary to execute the Property Master Plan.

¹ The Property Master Plan is a tool for planning the utilization of Channing's buildings and grounds to best serve the church's anticipated programs. These include, principally: worship, religious education, fellowship, special events and rentals. Considerations include present and future requirements for space, functionality and aesthetics, as well as associated costs. The Plan provides direction for work planning and fund raising requirements for major property projects, to be reviewed and discussed by the congregation and decided by the Governing Board. It also provides a plan for the ongoing upkeep of our buildings and grounds, as well as the business conduct of our rental property. The Property Master Plan is presently being developed through the Property Committee, with the goal of adoption by the congregation in the third quarter of 2008.

Strategic Goal 5. Act and communicate effectively in all congregation activities: We will organize our governing and communications practices to serve our committees and the congregation at large most efficiently.

Objective A. Our governance structure enables church leadership to focus on strategic as well as operational goals effectively and efficiently.

Objective B. We have a well-defined process for leadership development and succession planning, to support continuity and enthusiasm within our Governing Board and committees.

Objective C. Decision-making authority, as part of the church's democratic process, is clearly defined, with a goal of delegating such authority to the greatest practical extent.

Objective D. Two-way communication is encouraged and fostered between church leaders and the congregation as a whole.

Objective E. Communication between committees is encouraged and fostered, and committees work together for common goals.

Objective F. Our governance structure and bylaws are reviewed periodically and updated as needed to ensure that they best support the mission of our church.

Strategic Goal 6. Provide sufficient resources of money and

staff: We will foster a mindset of abundance that will creatively address the short- and long-term financial and staffing needs of the church, and provide the resources to achieve those needs.

Objective A. We have a well-defined process for budget planning and development. The responsibility for execution of this process is also well-defined and the processes are being performed. Those with the potential to submit budget inputs are trained and supported in their budget planning efforts.

Objective B. All Channing programs receive sufficient financial support to realize our ministry.

Objective C. Members and friends are regularly educated about Channing's financial processes and their responsibilities.

Objective D. We have a pool of trained people to pursue grants which can be used for property repairs and other church needs.

Objective E. We have well-defined processes for current staff management, including job descriptions, performance evaluations, and salary decisions. The responsibility for execution of these processes is also well-defined and the processes are being performed.

Objective F. The congregation has a good understanding of 'Staffing for Excellence' and has developed a timeline and priorities by May 2009 for increasing the hours and responsibilities of church staff.

Objective G. We have well-defined procedures for reimbursement of expenses and requests for funds beyond the current budget. Affected members are well-informed about these procedures, and those procedures are being followed.

Objective H. The annual budget includes an appropriate reserve account to fund normal maintenance and repairs of property, as well as repair and/or replacement of equipment and supplies.

Objective I. Supplies and equipment to support a professional organization are budgeted and funded.

Strategic Goal 7. Measure our progress: We will commit resources to establish and regularly use feedback mechanisms and tracking tools to measure our overall progress toward achieving our objectives, goals and vision.

Objective A. All new members are surveyed to assess the effectiveness and their satisfaction with their orientation to Channing membership.

Objective B. A meaningful sample of Sunday visitors are surveyed to get their first impression of Channing from various perspectives: congregation, sanctuary, church service, fellowship, etc.

Objective C. All members are surveyed annually to determine levels of satisfaction with various aspects of the church, including their own areas of particular interest and any volunteer roles they may have contributed.

Objective D. A meaningful sample of visitors to Channing events is polled to find out about their experience (e.g., feeling welcome, facilities, etc.)

Objective E. Important membership statistics are regularly measured and tracked, such as growth, attrition, attendance, RE participation, interests, volunteer service and canvass data.

Objective F. Additional feedback mechanisms and tracking measures are established and utilized as needed to properly measure progress towards objectives, goals and our vision.

Tracking Our Progress

SMART Objectives

Objectives are the stepping stones to the achievement of our goals, and the way the objectives are written can affect their usefulness. SMART refers to the acronym that describes the key characteristics of meaningful objectives, which are Specific, Measurable, Achievable, Realistic (sometimes Relevant) and Time-Bound.

Although long-term, ongoing initiatives as incorporated in this Strategic Plan do not meet SMART criteria, SMART milestones can be established on specific tasks over a measurable time period. For near-term tasks within each adopted Strategic Plan objective, it is intended that SMART milestones (sub-objectives) will be established on an annual basis using the format described below.

Details of the SMART methodology are available in many business texts as well as on the internet. One source available at the time of this writing is:

[http://en.wikipedia.org/wiki/SMART_\(project_management\)](http://en.wikipedia.org/wiki/SMART_(project_management))

Tracking Template for Objectives

After an objective is selected for action and assigned, the following template will be completed by the lead person for that objective, so that the approach for achieving the objective is clear and specifically planned, and so that progress can be easily tracked. The Lead will provide periodic updates to the Governing Board using this format.

Objective: Lead: Implementation window (start/end)	Approach (including cost and other resources)																				
Key milestones for this church year (follow SMART criteria)																					
<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 40%;">Task</th> <th style="width: 15%;">who</th> <th style="width: 15%;">start</th> <th style="width: 15%;">end</th> <th style="width: 15%;">Complete?</th> </tr> </thead> <tbody> <tr> <td style="height: 25px;"> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td style="height: 25px;"> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td style="height: 25px;"> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Task	who	start	end	Complete?															
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Status update notes (provide monthly)																					

Tracking Template example (hypothetical)

<p>Objective: 2C - All current members and friends are actively serving in some aspect of congregational activities.</p> <p>Lead: Membership</p> <p>Implementation window (start/end) 2008 - 2012</p>	<p>Approach (including cost)</p> <p>Find out the current level of involvement as a baseline, either through a survey or by review of membership list.</p> <p>Establish annual targets to increase involvement and re-measure.</p> <p>Establish volunteer coordinator position. (\$)</p> <p>Develop and implement plan to encourage greater involvement.</p>																									
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<table border="1"> <thead> <tr> <th data-bbox="285 730 716 804">Task</th> <th data-bbox="716 730 927 804">Who</th> <th data-bbox="927 730 1062 804">start</th> <th data-bbox="1062 730 1219 804">end</th> <th data-bbox="1219 730 1382 804">Complete?</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 804 716 877">1. Determine current level of involvement.</td> <td data-bbox="716 804 927 877">Membership</td> <td data-bbox="927 804 1062 877">6/08</td> <td data-bbox="1062 804 1219 877">8/08</td> <td data-bbox="1219 804 1382 877"></td> </tr> <tr> <td data-bbox="285 877 716 951">2. Establish annual targets for increased involvement</td> <td data-bbox="716 877 927 951">Membership</td> <td data-bbox="927 877 1062 951">10/08</td> <td data-bbox="1062 877 1219 951">10/08</td> <td data-bbox="1219 877 1382 951"></td> </tr> <tr> <td data-bbox="285 951 716 1024">3. Establish paid volunteer coordinator position and fill it.</td> <td data-bbox="716 951 927 1024">Membership with board</td> <td data-bbox="927 951 1062 1024">11/08</td> <td data-bbox="1062 951 1219 1024">12/08</td> <td data-bbox="1219 951 1382 1024"></td> </tr> <tr> <td data-bbox="285 1024 716 1094">3. Develop plan to encourage greater involvement</td> <td data-bbox="716 1024 927 1094">Volunteer coordinator</td> <td data-bbox="927 1024 1062 1094">2/09</td> <td data-bbox="1062 1024 1219 1094">3/09</td> <td data-bbox="1219 1024 1382 1094"></td> </tr> </tbody> </table>		Task	Who	start	end	Complete?	1. Determine current level of involvement.	Membership	6/08	8/08		2. Establish annual targets for increased involvement	Membership	10/08	10/08		3. Establish paid volunteer coordinator position and fill it.	Membership with board	11/08	12/08		3. Develop plan to encourage greater involvement	Volunteer coordinator	2/09	3/09	
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