

Strategic Action Plan
Westside Unitarian Universalist Church
Fort Worth, Texas
February 2015

The purpose of the Long-Range Planning Committee (LRPC) is to periodically establish goals for the Church. The current committee has been directed to create a Strategic Plan by March 2015.

A number of sources informed the work of the committee. We began with an analysis of the results of the congregational survey, which included a number of questions relevant to the future direction of Westside. Various committee members also facilitated and attended a series of “Congregational Conversations” in late summer 2014 during which we were able to hear from the broader membership about important priorities for the future. We have benefited from a review of the previous strategic plan, written in June 2011 and reviewed in June 2013.

The LRPC met monthly through the present. In recent meetings, we brainstormed about the Westside mission and vision, and we conducted an informal analysis of strengths, weaknesses, opportunities, and threats. We also identified elements of the previous plan that had and had not been accomplished since its drafting.

Based on the above activities, we believe that the following should be the priorities of Westside for the next 3-5 years:

Large-scale goals:

1. Improved space for our congregation and its activities.
2. Improvements in our staffing arrangements including pay and benefits.
3. Well-conceived plans for raising the funds necessary to successfully implement (1) and (2).
4. Targeted membership growth so as to reach a membership of 300 persons by 2020.

More specific additional goals:

1. Invest time and money in providing leadership training for the congregation.
2. Enhance Westside’s reach to the wider community:
 - a. Seek additional opportunities to collaborate with other churches and organizations on projects where such collaboration is synergistic with Westside’s objectives.
 - b. Enhance external communication about Westside, including opportunities for free or low-cost media exposure.
 - c. Determine needs for social concern in the local community.

- d. Partner with community groups for social action.
- e. Engage in robust social action in the world at large.

LARGE-SCALE GOAL (1): We note that by far, the most common sentiment expressed in the Congregational Survey, the Congregational Conversations, and the discussions in the LRPC is that Westside needs better space. While many have advocated for acquiring a new facility, we believe the more realistic alternative is for Westside to gain full access to our existing facility in the near future. The existing lease agreement is reaching an end. The opportunity will soon exist for Westside to operate without a tenant and reclaim significant amounts of space and even more significant availability of the building beyond evenings and weekends. The financial consequences of going without rental income are not trivial. This is discussed in conjunction with large-scale goal (3).

LARGE-SCALE GOAL (2): Regarding staffing, pay, and benefits, members of the LRPC, as well as several Westside members, have noted that we need to consider how to adequately compensate our existing staff. Separately, the LRPC noted in its deliberations that for a congregation our size, we rely more than is likely optimal on volunteers to carry out the activities and responsibilities of the church. Consequences of this include inefficiencies, having to sometimes forego or delay things we'd like to have accomplished, and burnout of existing volunteers who are in some cases asked to do more than is reasonable. We believe that comparisons of our staffing levels with churches of similar size will reveal that we are indeed under-staffed. We propose the following paid staff be eventually assembled to help with the operation of Westside:

Full-time minister
Full-time Director of Lifespan Religious Education
 $\frac{3}{4}$ time Sexton
 $\frac{1}{4}$ time Membership Volunteer Coordinator
 $\frac{3}{4}$ time office administrator
Bookkeeping service
 $\frac{1}{4}$ time Music Director
Pianist

As is the case with large-scale goal (1), we recognize that the financial implications of this proposed staffing structure are substantial.

LARGE-SCALE GOAL (3): Regarding financial considerations, as noted above, our proposals regarding space and staffing, if implemented, would require significant incremental resources compared with our current financial budget. Therefore, item (3) in the plan is a recommendation that Westside create a thoughtful and carefully constructed plan for generating the additional annual revenue needed to accomplish goals (1) and (2), while maintaining support for the existing level of activities. Below we have provided estimates of the annual costs related to staffing, which total

\$45,700.¹ In addition, the estimated incremental cost of fully controlling our existing building (without tenants) is \$40,800. Thus the total incremental annual revenue needed is approximately \$100,000.

In addition, we recommend the creation of a capital campaign to provide funds over and above the needed incremental annual revenue to cover building and grounds. Revenues can come from several sources, including successfully increasing the amount of support provided by the existing membership, but also from the support that would be provided by a targeted increase in membership (relates to large-scale goal (4)).

Finally, the ‘more specific additional goals, numbers 1-2 above, derive from the previous Strategic Plan. We believe that these are still worthwhile initiatives that should be retained and included as part of the next 3-5 year plan. Each will require careful thought about execution, and we recommend that appropriate committees be charged with responsibility for implementing these initiatives (e.g., items 4 and 5 may be appropriate for the Social Justice Council to undertake).

<u>Estimated Annual Cost of Staffing Proposal</u>			
<u>Long Range Proposed Staff</u>	<u>Current</u>	<u>Proposed</u>	<u>Delta</u>
Full time minister	\$76,778	\$76,778	\$0
Full time Director of Religious Education	\$35,750	\$35,750	\$0
3/4 time Sextant	\$12,900	\$20,062	\$7,162
1/4 time Membership Volunteer Coordinator	\$0	\$8,400	\$8,400
3/4 time Office Administrator	\$9,386	\$23,625	\$14,239
Bookkeeping service	\$0	\$6,000	\$6,000
¼ time Music Director	\$0	\$9,937	\$9,937
Pianist	\$10,000	\$10,000	\$0
<u>TOTAL</u>			<u>\$45,738</u>

Prepared by the Long-Range Planning Committee, January 2015. Ray Pfeiffer (chair), Reed Bilz, Tricia Bowes, Jane Hardwick, Gail Kilman, and Tom Woods. Alex Holt, interim minister, ex officio.

¹ Thanks to Bill Terry for providing these data. Some details have been omitted regarding benefits for each of the staff positions. Benefit costs would need to be added to the estimated costs noted in this plan.