

Vision 2000

Report of the Leadership Team

April, 1998

Introduction

and

Background

It is commonplace these days to hear that the world in which we live and work is “a different place,” and that rapid change, competing priorities and altered demographics require even the most stable organizations to re-imagine themselves for the days ahead. It is so, certainly, within the First Unitarian Society of Madison. Over the past few years, the Society has confirmed the importance of a clear focus on the future, faithful to our liberal religious tradition, but providing the congregation and its members opportunities to grow and respond to the challenges and needs of the world. Therefore, early in 1997, the Board of Trustees called upon the Society and its staff to enter upon a process of thinking and planning by which we might approach the coming century with confidence.

That process, known as Vision 2000, was guided by a few major considerations:

- The process was to be future-oriented and open to significant change in congregational life, while valuing our tradition, history and past practice;
- The process was to begin with the development of a common vision of the Society’s future, incorporating the dreams, ideas and recommendations of those who have a stake in the future of this congregation.
- The process was to give ample attention to the identification of concrete indicators of how the vision might find expression in the shared life of the Society;
- The process was to be led by Members of the Society whose work would be facilitated by an outside consultant well-acquainted with the unique features of churches; and
- Any recommendations deriving from the process were to be endorsed by the elected leadership of the Society.

Vision 2000 was initiated, as a process, by the naming of a team of elected officers, active and committed Members and staff. Roy Oswald, senior consultant with the Washington-based Alban Institute, a research and training institution for church

leaders, agreed to provide occasional consulting services during the course of the planning process.

Three congregation-wide strategies engaged Members and Affiliates in reflecting upon their lives as a part of the First Unitarian Society, in identifying the underlying assumptions and norms which shape congregational behavior, and in sharing their aspirations as people on a spiritual journey together. Two major congregational gatherings, informal meetings in the homes of members, and a congregational survey provided ample opportunities for all to envision the future for the First Unitarian Society. Additionally, representatives of the wider community were asked to assist the Society in exploring appropriate responses to the world beyond the walls of the Meeting House.

In January, elected leaders of the Society, along with representatives of formally affiliated groups, met to weigh a number of critical alternatives for future direction which had been identified in the visioning and planning process. (These alternatives are described in the Appendix to this report.) Led by consultant Roy Oswald, the group engaged in a rigorous process of discussion, debate and spiritual discernment, recommendations from which shaped this final report of the Leadership Team.

The result is a compelling and cohesive vision for the First Unitarian Society as it moves into the 21st Century.

In the report that follows, each Vision Statement is followed by a brief narrative that provides further explanation or rationale. Thereafter, Indicators profile the kinds of significant change that would illustrate accomplishment of the vision set forth.

Vision Statements and Indicators of Accomplishment

1. VISION FOR COMMUNITY:

A fellowship whose members feel connected to and cared for by one another, and who commit themselves to connecting with and providing caring support for their fellow congregants.

We perceive a genuine desire among many of our congregants — new as well as long-time Members— that the Society do more to address a yearning for a close, caring religious community where we can communicate openly with one another about our wants and needs within this fellowship, foster creative interchange and learn to disagree while maintaining mutual trust and fostering a climate of safety and acceptance.

Indicators:

- A congregational approach to “ministry,” which challenges members to identify their calling within the Society and supports them in their efforts
- A program that connects members in need with members who can help.
- A spiritual climate of safety and acceptance which honors both the intellectual and emotional and in which people feel empowered to express their faith, joys, pains, failures, and frailties.
- A culture that recognizes its children to be valuable members of the community, consistently invites their presence and participation, and provides opportunities for intergenerational connection and enrichment.
- A community of diversity without divisiveness in which the diversities in all aspects of congregational life are embraced and nurtured, while our shared values are honored and celebrated.
- Programs that nurture current and emergent small groups in which members can connect with and feel supported by one another.
- A system for connecting members with groups and programs they might be interested in, supported by an intentional, interactive communication process that keeps members informed about congregational activities and concerns.
- Realistic and clearly articulated standards for volunteer involvement which promote the community-building benefits of participation.

2. VISION FOR MEMBERSHIP:

A membership that commits itself to a deep responsibility for and full involvement in congregational life, including: attending worship services; pursuing lifelong religious education; volunteering for congregational service; engaging in social action endeavors; and pledging financial support.

We acknowledge a disparity between calls for services, support and involvement and the response of Members of the Society. Some Members are heavily involved; others are passive recipients of ministry rather than actively involved in ministering to others; yet other gifted Members have found no means of participating in significant ways. Therefore, we seek a new understanding of congregational life, challenging people now seen as occasional consumers of the services of an organization that delivers religious services to view themselves as fully responsible members of a religious community. We would establish a frame of reference for understanding the meaning of Membership in concrete and observable terms and how that meaning shapes our shared life as a congregation.

Indicators:

- Realistic and clearly articulated standards for Member participation in the life of the community, including worship, financial support, religious education, volunteer involvement, and social action.
- A congregational approach to “ministry,” which challenges and supports congregants in identifying and acting upon their calling within FUS as Members.
- A membership committed to living out Unitarian-Universalist principles in their daily lives.
- A plan for “converting” congregants to this new vision of Membership, and a mechanism for enrolling Members in this contract with the larger fellowship.
- A revised orientation program (New UU) that:
 - cultivates a deeper understanding of and appreciation for the living Unitarian-Universalist tradition and how it manifests itself in the Society’s congregational life,
 - prepares prospective Members for the standards of commitment concomitant with Society Membership, and
 - describes an “Affiliate” or transitional relationship for individuals interested in a full orientation to the Unitarian-Universalist tradition and Membership in the Society.

3. VISION FOR CONGREGATIONAL WORSHIP:

Vital, authentic worship services that speak to the minds, hearts, and will of the congregation and serve as the linchpin for community and fellowship-building at the First Unitarian Society.

We seek to sustain the worship for which this congregation is known and by which it is inspired: services that balance the demands of the mind and the needs of the spirit in each person, nurture and promote the fullest intellectual, spiritual, emotional and moral growth of each member of the community.

Indicators:

- A climate of worship which honors both the intellectual and emotional, which empowers congregants to express their faith, joys, pains, failures, and frailties during congregational worship.
- A pastorate adequately compensated and supported to uphold the Society's standards of excellence in preparing and leading high quality worship services throughout the year.
- Realistic and clearly articulated standards for Member participation in weekly worship services.
- Integration of themes explored and expressed in congregational worship into the spiritual lives and practices of congregants and their loved ones.

4. VISION FOR PERSONAL SPIRITUAL DEVELOPMENT:

Programming and educational resources in the spirit of a living Unitarian-Universalist tradition, dedicated to promoting and nurturing the fullest intellectual, spiritual, emotional, and ethical growth of congregants throughout their lives.

We seek to sustain a strong tradition of conventional religious education while remaining open to altered programs and novel structures that could support a robust, integrated program for the spiritual development of member groups and individuals. We acknowledge deficits in the current constellation of programs and activities for high school, post-high school and college-age youth and propose extended outreach to these groups through structured education, community service and support networks.

Indicators:

- Programming that empowers congregants to take ownership of their own spiritual development by helping them identify their personal spiritual paths, discover tools for private personal spiritual reflection and expression, and incorporate spiritual practices into their daily lives.
- A plan for religious education that promotes and supports lifelong learning opportunities for children, youth, and adults.
- Realistic and clearly articulated standards for Member participation in religious education programming, promoting the benefits of on-going spiritual questioning and seeking.
- Opportunities for cross-generational learning.
- Structured opportunities for education and spiritual growth appropriate to high school youth.
- Revitalized ministry to post-high school and college youth through the Channing-Murray organization.
- Creation of and support for intentional opportunities for congregants to engage in significant dialogue about divergent beliefs and convictions.
- Greater awareness among all adults of the content and purpose of RE programming for children and youth.
- Greater engagement of adult congregants in children's and youth RE programming.
- Prescribed standards for church school teachers and the training and support necessary to uplift the quality of church school teaching to those standards.
- Mentoring programs and other mechanisms which assist youth in making the transition from church school to full congregational involvement.

5. VISION FOR MUSIC:

An approach to musical expression in performance, worship, and congregational life that affirms a commitment to excellence and that honors and resonates with a membership of growing diversity.

Music's place in the life of the First Unitarian Society has been notably strong, meriting high praise from congregants and community members alike. We seek now to assure the continuation of that tradition and to expand and enhance its spiritual significance for members by weaving musical expression more fully into the fabric of our congregational life.

Indicators:

- Musical choices for weekly worship services that recognize the diverse ages, experiences, desires, and needs of our congregants and evoke a spiritual connection with a broad range of participants, e.g.,
 - music performances that capture the spirit of the weekly message, and
 - hymns that heighten congregants' experience of participating fully in the spirit of worship.
- Programming that provides opportunities for musical expressions of faith in all areas of congregational life.
- Music staff adequately compensated and supported to uphold FUS's standards of excellence in planning and providing music programming throughout the year.

6. VISION FOR SOCIAL ACTION:

A proactive, progressive agenda for social action and community involvement that stimulates deep involvement from congregants, and produces a significant impact on targeted social justice issues.

While acknowledging the generous involvement of congregants in the support of charitable outreach in the Madison community, we seek significant changes in our congregation's understanding and support of and engagement with the key social justice/social action issues of our day, while maintaining a cohesive organizational focus. Therefore, we seek to bring members of the church into a world that is beyond their own, through concrete personal and group experiences, incorporating educational programs, advocacy, investment options, charitable work and collaborative relationships with community agencies and churches of shared purpose.

Indicators:

- A plan for moving congregants to a more outward-looking approach to spiritual fulfillment and social responsibility.
- A congregational approach to social action, which challenges members to identify their calling within our local community and beyond and supports them in their personal and shared responses.
- Greater awareness among congregants of the social justice initiatives of the Society and the Unitarian-Universalist/UU Service Committee on both local and international levels.
- A variety of structured opportunities for congregants to address key social justice issues through charitable support, advocacy, and direct service.
- Intensive concentration of resources in selected areas of social concern in order to effect significant and lasting change.
- Realistic and clearly articulated standards for Member participation in social action programming.
- Public acknowledgment of the First Unitarian Society as an intentional model of high standards for personal and community action.

7. VISION FOR GOVERNANCE:

A workable structure for governance and organization, where roles, responsibilities and authority are understood and respected, where participation and involvement are strengthened and where the quality of leadership and management is enhanced.

We reaffirm our commitment to the principles of congregational polity and democracy so valued in the Unitarian-Universalist tradition. Nonetheless, significant flaws exist in our present organizational structure and we seek greater clarity and precision in the description of roles, responsibilities and decision-making authority within and among the congregation and its affiliated organizations.

Indicators:

- An organizational strategy that moves the Society from its “pastoral” structure to one appropriate for a corporate-sized church.
- An approach to governance that empowers the Board of Trustees to focus its efforts on policy and the staff on operations.
- An organizational structure that connects every group at FUS with the Board, including affiliated groups (e.g., Alliance, Interweave, etc.)
- Greater congregational awareness of and involvement in congregational governance.
- A system for identifying potential leaders and providing ongoing leadership development and support.
- Realistic and clearly-articulated charges to each organizational unit (e.g. committees, councils, task forces, etc.) and full descriptions of the roles and responsibilities of church leaders, including elected officers, trustees and chair persons of standing and ad hoc committees and task forces.

8. VISION FOR STAFFING:

A well-qualified, appropriately compensated staff, sufficient to meet the administrative and programming needs of our corporate-sized congregation.

We seek to achieve staffing levels for the Society to handle a full range of services appropriate to a church of this size and complexity. We seek to achieve compensation levels that are equitable, meet the standards of our denomination and are consistent with relevant regional or local employment patterns.

Indicators:

- Staff adequately compensated and supported to direct the daily operations of the Society.
- A standard for program staff support of at least one staff person per one hundred congregants.
- An on-going plan for anticipating and addressing future staffing needs and concomitant space and equipment requirements.
- A program for continuous quality improvement and staff development.

9. VISION FOR FACILITIES:

Modern, well-maintained, and sufficient facilities and grounds that provide for our current and anticipated programming and staffing needs, while honoring the historic, architectural, and spiritual significance of the Meeting House.

While we give priority to the preservation and maintenance of the Meeting House as a landmark of spiritual and architectural significance to the congregation and the community, there is little question that major modernization, renovation and expansion will be imperative if we are to provide adequate facilities for an increasing array of programs and activities, typical of a growing and changing congregation.

Indicators:

- A comfortable, well-maintained, and accessible home for existing groups, programs and staff.
- A financial and operational plan for, responsible maintenance, modernization and facilities expansion to support emerging groups and programs and future staff needs.
- Modernization efforts that assure improved
 - lighting in the auditorium and loggia
 - ventilation and climate control
 - lobby restrooms
 - exterior and interior signage
 - kitchens and food-service facilities
 - storage
- Reconfigured parking arrangements.
- Fully implemented plans for landscaping.
- Immediate, mid-range and long-range plans for roof repair/replacement.

10. VISION FOR FINANCES:

A system for stewardship, fund raising and fund-management that provides for our current and anticipated programming, staffing, and facilities needs.

Challenged by ever-expanding expectations, the Society depends on financial stability to make its vision real. Therefore, we seek to employ inventive financial planning strategies, to expect prompt and responsible stewardship among Members and Affiliates, and to implement a comprehensive approach to fund raising to ensure the support and continuation of this spiritual community.

Indicators:

- Realistic, clearly articulated standards for congregants pledging at determined percentages of gross annual household income.
- A projection of the financial support needed to support current and anticipated programming, staffing, and facilities needs.
- A fund raising program adequately staffed and supported which raises the level of responsible stewardship among Members and Affiliates.
- A plan for strengthening the Society's planned giving program.
- A plan for strengthening the First Unitarian Society Foundation and its funding, investment and endowment initiatives.