



Grounding and Growing: a DRAFT ICUU Strategic Plan 2009–2014

Since the 2007 Council Meeting the Executive Committee of the International Council of Unitarians and Universalists has been working to develop a Strategic Plan to guide our efforts over the next five years. As with all good plans, it must arise from and support our Statement of Mission and our Principles and Purposes included as Appendix 1. It also must be built on an evaluation of our strengths and weaknesses and realistically include the challenges which may lay ahead. An analysis of organizational strengths and weaknesses (SWOT) is included as Appendix 2.

Such a plan requires the endorsement of a full Council Meeting. More importantly, it requires the support of Member Groups and internationally minded individuals to succeed. The following plan will be submitted to the delegates at the 2009 Council Meeting in Koloszvár, Transylvania, September 1-5, 2009.

At this stage of its development the ICUU needs to become more solidly grounded financially and organizationally in order to meet the ever-expanding growth of our global Unitarian and Unitarian Universalist communities. Four main areas of operations define the plan: **Financial Base and Stability, Building Organizational Capacity, Design and Delivery of Programs, and Building Strategic Partnerships.**

This proposed Strategic Plan is being widely circulated so that national groups can have time to discuss it and suggest revisions, and so that delegates can develop informed decisions. There will be a time for delegates to the ICUU to discuss and revise the plan before its anticipated adoption near the end of the Council Meeting. The ICUU welcomes all feedback through our Executive Secretary, John Clifford jcc.universalist@mac.com.

1. Financial Base and Stability

- Increase our base to fully support 1 – 2 Full Time Staff (within 4 years).
- Achieve a practical member dues structure with 100% participation
- Increase financial support from member groups
- Increase in-kind support from member groups in order to decrease ICUU expenses
- Create a Fundraising Team including at least one Executive member and several knowledgeable other members.
- Develop an ongoing, global, congregationally-based fund-raising plan and capacity to solicit with a goal of raising \$100,000- \$150,000 dollars per year. (200 congregations giving \$500 each per year, average.)
- Continue to build an annual appeal to Friends of ICUU raising \$25,000 - \$50,000 annually.
- Explore new program grant sources for programs
- Solicit capacity building grants from UU granting bodies.

- Develop several profit-making programs with a goal of raising \$5000 – 10,000 year.

2. Building Organizational Capacity

- Train and integrate new staff
- Increase staff time to 1 to 2 full time equivalents, which may include part-time workers
- Increase volunteer capacity by recruiting and training individuals to work in administration, program and event leadership, leadership and ministerial training and consulting.
- Develop specific portfolio positions for Executive Committee members and recruit nominees for these roles. In addition to the existing officer positions of President, Vice-President, Secretary and Treasurer, portfolios *might* include Program Planning, Fundraising, Communications (to members and others), Volunteer Recruitment and Training
- Develop program leadership teams, consultant teams, capacity building teams
- Increase capacity of member groups to help one another through networking and mentoring, and through agreements/covenants for shared goals and programs.
- Develop a reporting form so that member groups can easily share news of accomplishments and progress towards national goals. The form or template can be used to report to ICUU at Council Meetings and to the Executive in non-council meeting years. These reports can be posted to the website to foster contact and global awareness and to provide mutual encouragement and support.
- Develop manual(s) for hosting and holding ICUU events including Council Meetings, Leadership Conferences, Theological Symposia and other events. These manuals would include clear statements of the standards and expectations of the ICUU, basic and desirable features (around food, lodging, logistics etc.), planning timelines (go-no go points on fundraising, registration opening etc), copies of past helpful planning documents and templates, financial accountability documents and policies on subsidies/sponsorship/scholarship support.

3. Design and Delivery of Programs

- Improve programming publicity and expand participation shown by more people involved, more sharing between member groups, more effective response to articulated needs.
- Increase staff time devoted to program planning, development, coordination, delegation and support. Build administrative support costs into program budgets.
- Develop several teams of volunteer program leaders for a variety of programs, and train them to carry out the programs effectively.

Program Goals and Timeline: Our basic programs and events include:

~Council Meetings (open to delegates and interested others, can include study tour)

~International Conferences – topical rather than regional (such as theological symposia)

~Task Forces: Currently: Ministerial Training and Education

~Leadership Training and Organizational Consultants

~Executive Committee visits to member groups (part of training and consulting)

~On-line courses and lessons, plus regular ICUU communications, from sending out the Global Chalice and bi-weekly/monthly “lessons” to offering accredited on-line courses in religion, theology, philosophy, and organizational development.

~Publishing (books of special interest to global U-Us).

~Study Tours for U-U Learners – hosted by member groups, self-supporting study tours, developed as revenue sources for hosts and the ICUU, with standards for hosting, as avenue to greater understanding, greater international engagement, and greater participation in and support of ICUU by congregations and individuals.

~Continue to explore possible creation of building loan program

~Focus on member-to-member partnerships for economic development and sustainability

Five-Year Program Timeline

2009

Sept 1 – 5 Council Meeting, Koloszar

Leadership Training: Asia in 2009 or 2010.

Publishing: Begin one new publication project (on Hajom Kissor Singh)

Task Force on Ministerial Education and Training

- Tasks: Catalogue ministry requirements and material resources.
- Begin development of international guidelines for ministerial education.
- Begin one new on-line course and plan one regional program of intensive courses, probably in Africa.
- Begin researching available regional theological schools in Africa, Asia, and South America, and available sources of local, regional, and international financial support.
- Identify prospective students who are ready to begin now, and help some of them get started. Add other tasks/goals to the three-year project if necessary.
- Work with planners of 2010 Theological Symposium and Minister Conference
- Develop International Guidelines for U/U ministry

2010

Study Tour : possibly hosted by Argentina Unitarians

Regional Training and Consulting : Capacity Building Workshops, Africa

International Ministers Conference and Theological Symposium_July 9-17, Netherlands

Task Force on Ministerial Education and Training (meet once at Symposium)

- Continue projects started in Year One.
- Offer one or two new regional programs of intensive courses.
- Develop minister-on- loan project.
- Pilot two new on-line courses.
- Discuss possibilities for international internships and mentorships.

- Include discussion and evaluation of these projects at ICUU Council meeting (Fall 2011) with participation of Advisory committee, council delegates, and other council meeting attendees.

Publishing – Begin one new project (Could be early Czech Unitarian leaders)

2011

Council Meeting

Regional Training and Consulting Capacity Building Workshops, South America and Asia

Task Force on Ministerial Education and Training (meet once at Council meeting)

- Prepares recommendation for on-going ICUU programs and policies to support and nurture U-U ministry world- wide.
- (Offer at least one regional program of intensive courses.)
- Pilot two new on-line courses.

Publishing: Theological Symposium results

2012

Study Tours

Regional Training and Consulting

International U-U Musicians Conference

Study Tours (1 or 2) Self Supporting

Possible Education Programs resulting from recommendations of Task Force on Ministerial Education

2013

Council Meeting

4. Strategic Partnerships

Strategic partners are organizations and/or individuals whose mission and goals strongly align with the mission and goals of the ICUU, and whose work can enhance the work of the ICUU (and vice versa.) Strategic partners offer expertise, training, information, personnel, projects, and resources which can aid and support ICUU member groups and ICUU programs. Strategic partners receive similar benefits from the ICUU. For example, we have been working for many years in close partnership with the UU Partner Church Council. This could be considered an existing strategic partnership. Also, the growing online community formed as a result of the International Convocation of Unitarian /Universalist Women (ICUW) gives many opportunities for strategic partnership.

Our goal is to develop more organization-to-organization partnerships around shared issues and work. Several organizations are already interested:

- First People's Worldwide, beginning to investigate sharing project with Burundian UUs who support local indigenous peoples.
- Planned Parenthood International, working on the delivery of health care for women.

Appendix 1

ICUU Mission Statement

"The mission of the ICUU is to:

- a. build relationships, through communication and collaboration
- b. develop spiritual community among member groups and their leaders
- c. identify and nurture prospective and emerging groups
- d. foster our U*U faith for mutual inspiration, development and growth"

[agreed by Council in 2007]

ICUU Principles and Purposes

We, the member groups of the International Council of Unitarians and Universalists, affirming our belief in religious community based on:

- Liberty of conscience and individual thought in matters of faith
- The inherent worth and dignity of every person
- Justice and compassion in human relations
- Responsible stewardship of the earth's living system
- And our commitment to democratic principles

Declare our purposes to be:

- To serve the Infinite Spirit of Life and the human community by strengthening the worldwide Unitarian and Universalist faith
- To affirm the variety and richness of our living traditions
- To facilitate mutual support among member organisations
- To promote our ideals and principles around the world
- To provide models of liberal religious response to the human condition which uphold our common values.

[agreed by the founding Member Groups
in Essex, Massachusetts, 1995]

Appendix 2

SWOT Analysis – A Method for Strengthening Our Strategic Plan

(SWOT is an acronym that stands for Strengths, Weaknesses, Opportunities, Threats)

Delegates and national groups are invited to use the SWOT tools to analyze this plan. We will be using this tool to examine the Plan at the September Council Meeting.

A SWOT analysis must first start with defining a desired end state or objective. A SWOT analysis may be incorporated into the strategic planning model.

- **Strengths:** attributes of the person or organization that are helpful to achieving the objective.
- **Weaknesses:** attributes of the person or organization that are harmful to achieving the objective.
- **Opportunities:** *external* conditions that are helpful to achieving the objective.
- **Threats:** *external* conditions which could do damage to performance.

Identification of SWOTs is essential because subsequent steps in the process of planning for achievement of the selected objective may be derived from the SWOTs. Decision makers have to determine whether the objective is attainable, given the SWOTs. If the objective is not attainable a different objective must be selected and the process repeated.

FOR MORE INFORMATION ON SWOT PLEASE VISIT:

http://en.wikipedia.org/wiki/SWOT_analysis

<http://www.quickmba.com/strategy/swot/>