



## **Unitarian Universalists for Social Justice in the National Capital Region**

### **A TRANSITIONAL STRATEGIC PLAN FOR 2013-2015**

#### **UUSJ VISION**

We envision a vibrant regional community of Unitarian Universalists working together to make a peaceful, just, and sustainable world.

Source: UUSJ Purpose as stated in the By-Laws dated 5/22/2010

#### **UUSJ MISSION**

To provide leadership in the region for effective regional social action; to advance the social (action) work of UU congregations and organizations; to increase the frequency, impact, and visibility of UU collaborative efforts that reflect UU principles (in the National Capital Area).

Source: UUSJ Purpose as stated in the By-Laws dated 5/22/2010

#### **BACKGROUND**

To more effectively realize our Vision, the UUSJ Board established a Strategic Planning Group (SPG) in February 2013 to assess our direction and adequacy. The Board made clear its strong desire that UUSJ become a more proactive organization; that it increase its focus on social justice action, advocacy, and witness activities, rather than just offering education on social justice issues and encouraging work in each member congregation. The SPG's charge did not include a comprehensive analysis of all aspects of UUSJ as an organization, and did not include all tasks required of committee in the plan. Nor did it include a review of UUSJ's Vision, Mission, or Purpose. The SPG recommended that they be reviewed and included in the plan, "a Vision that can remain valid over an extended period of time and a Mission that reflects interests of congregational and individual members." The SPG called for Strategic Plan Goals that reflect a realistic expectation of resources available to carry out that mission.

The recommendations of the SPG are reflected in the Transitional Strategic Plan, which builds upon the strengths developed by UUSJ over its 13-year history and calls to extend its reach and influence. It lays out a more active role in social justice advocacy and witnessing. It takes advantage of our strategic location surrounding the U.S. Capitol. It proposes developing stronger ties with UU congregations and interfaith communities as well as faith-based and other organizations that share our liberal religious values. This

plan proposes to upgrade our information technology and enhance our use of social media to reach out to new members and connect more effectively with current members.

An effective strategic plan can serve as a roadmap to guide us on our journey toward greater social justice. It is a living, organic document rather than a rigid blueprint. This plan seeks to balance structure with flexibility, accountability with opportunity.

These general principles underlie all of the goals set forth in this document:

(1) The work of UUSJ is grounded in and is expressed through a spiritual and moral commitment that reflects deep Unitarian Universalist roots and is expressed through our seven guiding UU Principles. It links to current UU values as expressed in the aspirations of our members and their congregations. It draws upon commitments to social justice as expressed in resolutions passed by the UU General Assembly and similar faith-based statements of conscience. In all our activities we shall remain mindful of the moral imperatives that call us to action.

(2) UUSJ activities shall honor the dignity and worth of all human beings and shall take into account their impact upon people of color, low-income communities, and other groups marginalized by mainstream society. In all things, we shall seek to promote diversity and empowerment in our own organization, in our member congregations, and in our communities.

(3) Being located in the Nation's Capital region, UUSJ occupies a unique niche. UUSJ has the potential to bring together the power and influence of more than 8,000 UUs and others who share our Vision to shape public policies in ways that reflect our UU principles and values. By providing regular opportunities to engage with public policy makers and leaders, we can capitalize on the wealth of talent and expertise of member UUs who have worked in the public policy arena.

It is up to us to make this potential a reality. The Executive Committee has agreed to appoint a Strategic Plan Implementation Group (SPIG) to oversee the implementation of the Plan and review its progress, making adjustments in the Plan as circumstances warrant.

## UUSJ STRATEGIC GOALS 2013-2015

### Program Goals

1. **Advocacy: To provide leadership that increases the impact of UU influence on public policy issues.**<sup>1</sup>

#### Supporting Actions

- 1.1. Form an Advocacy Oversight Group to develop advocacy proposals and oversee their implementation.

- Proposed Action Group: Executive Committee and Nominating Committee
- Proposed Progress Review: September 2013

- 1.2. Develop and implement an Advocacy Plan for 2013-2014.

- Proposed Action Group: Advocacy Oversight Group (to be formed), the Executive Committee, with the Program Committee
- Proposed Progress Review: September 2013

- 1.3. Develop and implement an Advocacy Plan for the year 2014-2015 that will appeal to and involve a majority of member congregations.

- Proposed Action Group: Advocacy Oversight Group
- Proposed Progress Review: February 2014

2. **Giving Witness: To increase public awareness and to influence policy makers by taking a public stand in public forums for UU principles and values on social justice issues.**<sup>2</sup>

#### Supporting Actions

- 2.1. Consult and coordinate, as appropriate, with the UUA Witness Ministries staff and other UU advocacy groups and leaders on projects that are mutually beneficial in carrying out our mission and that capitalize on UUSJ's unique strategic location in the national capital region.

- Proposed Action Group: UUSJ Executive Director and Co-chairs
- Proposed Progress Review: September 2013 and quarterly thereafter

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<sup>1</sup> UUSJ will initiate an aggressive educational and advocacy program within the limitations imposed by Federal law, IRS regulations, and Federal court decisions as they apply to 501(c) (3) organizations with a 501 (h) election, for advocacy on public issues and grassroots lobbying on specific proposed legislation.

<sup>2</sup> "Witnessing" is distinguished from advocacy in that advocacy generally entails presentations to or discussions with public officials as a means of influencing public policy, whereas witnessing attempts to educate the public and influence public opinion through such measures as demonstrations, rallies, sit-ins and various other forms of civil action. This is an essential distinction to ensure compliance with limitations placed on 501(c)(3) organizations. See footnote number 1.

2.2. Identify, promote, and participate in witnessing opportunities as they emerge. Collaborate and work in coalition with other organizations to achieve critical mass while maintaining flexibility as events develop.

- Proposed Action Groups: UUSJ Staff, UUSJ Executive Committee, Board Members
- Proposed Progress Review: December 2013 and quarterly thereafter

2.3 Plan, organize, and lead witnessing opportunities on UUSJ priority issues as opportunities emerge but no less than twice per year.

- Proposed Action Group: Staff, Advocacy Oversight Group, and Co-chairs
- Proposed Progress Review: September 2013 and quarterly thereafter

2.4. See also Goal 4, Supporting Action 4.3. – Seek opportunities for co-sponsorship and endorsements.

### **3. Capacity Building: To increase the ability of Unitarian Universalists in the national capital region to carry out effective social action.**

Capacity building opportunities should include educating members about priority issues using multiple methods and venues, disseminating information and creating networking opportunities, including celebrating social justice achievements at functions such as the annual Social Justice Awards Benefit Gala.

#### Supporting Actions

3.1. Plan and conduct face-to-face meetings with ministers, social justice staff, and lay leaders of all the congregations in the region by the end of this transitional planning period (June 30, 2015).

The purpose of these meetings is to establish and/or strengthen UUSJ's relationships with congregational parish ministers, social justice staff, and lay leaders by soliciting their views on social justice concerns, UUSJ's goals, priorities, and activities to strengthen UUSJ and make it more relevant to congregations.

- Proposed Action group: Executive Director, Co-chairs, and Board Members, in coordination with the Communications and Outreach Committee
- Proposed Progress Review: September 2013 and quarterly thereafter

3.2. Cultivate relationships with individual members of the Board of Trustees and alternates by contacting each member individually periodically but not less than twice per year, to discuss UUSJ activities, Board member concerns, and their roles and responsibilities.

- Proposed Action Group: Co-chairs, Executive Director, and Nominating Committee
- Proposed Progress Review: December 2013 and quarterly thereafter

3.3. Revise UUSJ's method for establishing priorities.

For the present, UUSJ will retain its current four priority issues (immigration, the environment, income inequality, and LGBTQ issues). These priority issues shall be rebranded as "*Priority Action Areas*." They shall remain in effect until such time as the Executive Committee, or its

designated body, has opportunity to review them and make recommendations to the Board of Trustees for such adjustments as may be required by (a) implementation of this Plan, (b) the aspirations of member congregations, and (c) available resources.

Additionally, the Executive Committee and the Board may wish to consider a new methodology for selecting issues within these or revised Priority Action Areas. One such methodology is set forth in “Choosing an Issue: Determining Grounding, Accountability, Fit, and Opportunity” of the UUA publication Social Justice-Congregational Identity and Community Outreach (pp. 22-23).

- Proposed Action Groups: Co-chairs, Executive Committee, and Board of Trustees
- Proposed Progress Review: December 2013 and every six months thereafter

3.4. Initiate regular contact with staff or volunteers responsible for congregational communications including social media, websites, and newsletters to determine how to best submit, share, and connect with congregational social media sites.

- Proposed Action Group: Staff in coordination with Communications and Outreach Committee.
- Proposed Progress Review: December 2013 and annually thereafter.

3.5. Orient programs toward “how to” workshops as opposed to “issue” workshops.

Conduct at least two capacity-building workshops per year. For 2013-2014 these workshops should focus on techniques for effective advocacy and community-based organizing and engagement. Workshops for 2014-2015 will be determined by the beginning of the program year.

- Proposed Action Group: Executive Director and Program Committee
- Proposed Progress Review: September 2013 and quarterly thereafter

**4. Collaboration: To increase outreach to other faith-based and secular organizations to pursue common activities that support UU principles and values.**

#### Supporting Actions

4.1. Develop and maintain a list of organizations and contact persons, and all contact information for interfaith and secular organizations whose interests and actions parallel those of UUSJ’s priority areas.

- Proposed Action Group: Staff in coordination with Communications and Outreach Committee
- Progress Review: September 2013 and quarterly thereafter

4.2. Make regular personal contact with appropriate persons within those organizations to identify opportunities for collaboration.

- Proposed Action Group: Executive Director
- Proposed Progress Review: December 2013 and quarterly thereafter

4.3. Seek opportunities for co-sponsorships and endorsements.

Within the framework provided by UUSJ's Endorsement Policy, identify (seek out if necessary), evaluate, and take appropriate action on requests from other organizations to support their social justice causes. Communicate results to member congregations.

- Proposed Action Groups: Executive Director, Executive Committee, Board – if appropriate
- Proposed Progress Review: September 2013 and quarterly thereafter

## **Internal Management Goals**

To ensure clarity of mutual expectations and understanding of management roles, the Executive Director and the co-chairs shall meet in executive session every six months to mutually assess progress towards our Strategic Goals.

### **5. Communications: To improve our internal and external communications.**

#### Supporting Actions

##### 5.1. Establish a Communications and Outreach Committee.

The purpose of this Committee is to develop and implement a comprehensive communications plan on UUSJ use of information technology, social media, outreach, and promotion. The Committee can be divided into subcommittees. One subcommittee would focus on Information Technology including the website, database, hardware, and other IT needs. The other would focus on communication and outreach to the board, congregations and the larger community and oversee the promotion of UUSJ with these entities. The committee will submit a plan for implementation annually.

- Proposed Action Groups: Nominating Committee – to nominate members of the committee in coordination with Executive Director and with assistance from Board members
- Progress Review Date: September 2013

##### 5.2. Develop and implement a comprehensive Communication and Outreach Plan that will expand the use of social media to communicate on regular basis with our UUSJ Board members, member congregations, individual members, and the larger community.

UUSJ must better communicate using modern social media tools such as Facebook and Twitter. The plan shall call for transmitting frequent tailored messages about UUSJ priority social justice issues, opportunities, and other information about UUSJ and to engage readers in discussion. The plan shall call for a schedule of a minimum number of communications weekly.

- Proposed Action Group: Communications and Outreach Committee under guidance from the Executive Committee and in coordination with the Staff
- Proposed Progress Review: September 2013 and quarterly thereafter

##### 5.3. Procure a Contact Management System (CMS) to enhance the functionality of the UUSJ website and database that will facilitate communication, advocacy, and fundraising.

- Proposed Action Group: Communications and Outreach Committee with guidance from the Executive Committee and in coordination with the Staff
- Proposed Progress Review: September 2013

5.4. Evaluate the relative value of UUSJ e-News and revise the format and schedule as necessary.

- Proposed Action Group: Staff in coordination with Communications and Outreach Committee and drawing upon Board members for material.
- Proposed Progress Review: September 2013 and quarterly thereafter

5.5 Evaluate existing materials and develop and procure as – needed print and online promotional, educational, and advocacy tools and materials.

- Proposed Action Group: Staff in coordination with Communications and Outreach Committee
- Proposed Progress Review: September 2013 and quarterly thereafter

**6. Resource Development: To grow our financial base to pursue social justice more effectively.**

The Strategic Planning Group and co-chairs understood that to achieve our Vision, fundraising will have to become a priority for the Executive Director and Board.

Supporting Actions

6.1. Re-establish the Development Committee and charge it with developing and implementing a funding plan that puts the UUSJ budget above \$50,000 (United Way cut-off amount) for FY 2014-15 and above \$60,000 in FY 2015-16.

- Proposed Action Groups: Nominating Committee – to nominate committee members in coordination with Executive Director and Executive Committee; and. Development Committee – to grow the base – working in coordination with the Finance Committee and the Treasurer
- Proposed Progress Review: July 2013 and quarterly thereafter

6.2. Increase the number of individual dues-paying members and donors in each of the next two fiscal years by 50 percent.

- Proposed Action Groups: Development Committee in coordination with the Executive Director, and with individual Board Members (who are expected to recruit from among their congregations)
- Proposed Progress Review: September 2013 and quarterly thereafter