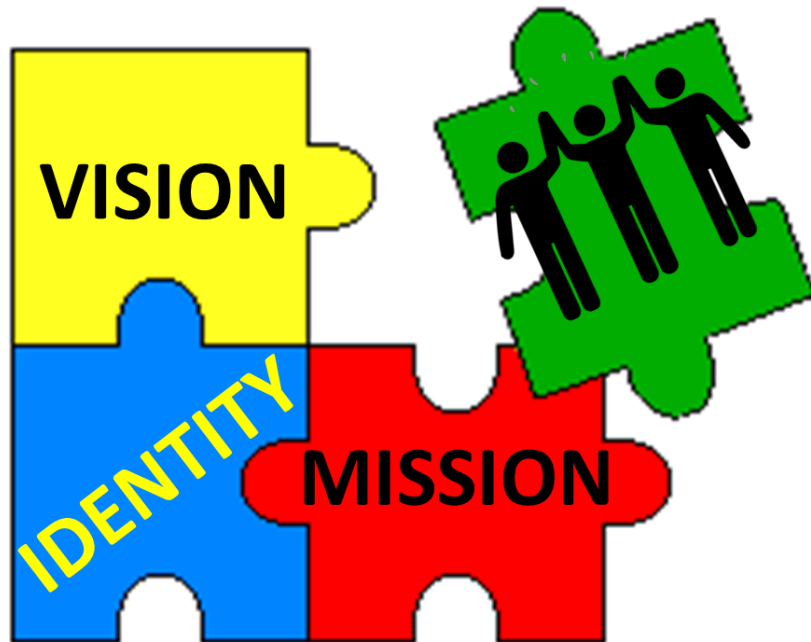


Rolling Strategic Plan 2024-2027

First Unitarian Church of Pittsburgh

September 2024



Annual Priorities 2024-2025

- Diversify And Grow Our Membership
 - Expand the diversity of our membership, especially in the areas of age, more children and families, race, LGBTQ+ identities, class, and ability
 - Create a church full of activity and participation in order to grow our membership
- Create Long-Lasting And Meaningful First Unitarian / Community Partnerships Advancing Racial Justice and Environmental Justice
 - Partner with organizations, neighborhoods and other churches in our communities
 - Center our partnerships on advancing racial justice and environmental justice

Supporting Activities

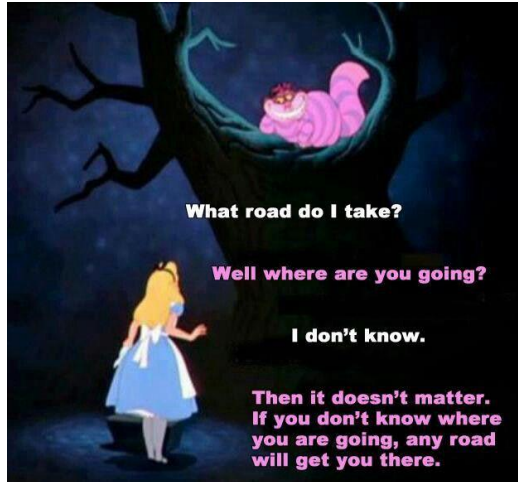
- Improve communication, organization and coordination within the church
- Organize more church events, both internal and external. Internal events foster a sense of being in community. Outward-facing events attract like-minded people who might become partners or members.

Summary of Planning Process

The governance framework for First Unitarian involves a **rolling, year-by-year** approach to long-term strategic planning. Responses to Open Questions are distilled into an annual list of short-term **Priorities of the Church**. The Priorities of the Church are created from feedback from the congregation and through an iterative process between the Board (Board of Trustees, BOT) and the ministerial staff. Therefore, the Board, the staff, and the congregation are all engaged in both short- and long-term thinking every year.

Section 1. Overview

As individuals we aspire to a fulfilled life where we can achieve our goals. We reach a goal by first clearly defining it and then by formulating and following a plan to achieve it. As Alice discovered in Wonderland, one cannot know what path to take if one does not know the destination.



Similarly, a church can best achieve its goals by articulating a clear, shared understanding of what those goals are along with a tangible, specific plan for how to get there. In the case of a church, the determination of goals depends on the identities and aspirations of many people. To discern shared goals, we apply the Fifth Unitarian Universalist Principle: “The right of conscience and the use of the democratic process within our congregations and in society at large.”

Our vision springs not from a national authority or a minister or Board members, but from the members of our congregation. Under the partnership governance model our church now uses, the Board is charged with the task of discerning a vision from the members of the congregation, and with distilling that vision into a mission that can be achieved through a cooperative effort of the staff and congregation.

Our strategic planning process does not occur once in five or ten years in order to produce a single document. Instead it is an ongoing annual process that involves the congregation, the staff and the Board. It produces each year a rolling, three-year strategic plan. In this way, it is updated and revised each year to incorporate assessment of the current plan and introduce changes as experience indicates.

This document summarizes the process we are using to discover our shared identity and vision, and the path to achieve that vision. It includes the following sections:

- Section 2 states the most recent mission statement of the congregation that has emerged from the discernment process
- Section 3 describes the outcomes from the previous year’s plan
- Section 4 describes the identified annual church priorities that have arisen from the congregational conversations and have been vetted by the Board and Ministerial Staff
- Section 5 summarizes the role of the church staff in implementing the strategic plan
- Section 6 describes the assessment process that provides feedback on how well the current goals are being achieved, and what changes may be warranted

Section 2. Current Understanding of Identity, Vision, and Mission

It has been the job of the VIM Team (Vision, Identity, Mission), through communication with the congregation, to update the shared living **mission** that is the reason First Unitarian exists. The path to reworking this mission followed a process of discernment of

- the **identity** of First Unitarian Church, i.e. who we are right now, and
- the **vision** of First Unitarian Church, i.e. who we want to be in the future.

Taken together, the identity and vision information have informed and are reflected in our updated mission. The mission is what parts of our shared vision we want to accomplish right now. It is the guidepost for all decisions to be made and all actions to be taken by the Board, the Ministry, and the Congregation of First Unitarian Church. It is intended to be a living document to be regularly revisited both as to whether it accurately states our intentions and also as to whether we are objectively living up to its standards. The current incarnation of the living mission of First Unitarian Church follows below.

The First Unitarian Church of Pittsburgh exists so that people who share Unitarian Universalist values can gather in a religious community for spiritual and intellectual growth and social transformation, with resources adequate to realize this aspiration. We have captured these aspirations into our mission. This mission actively informs the strategic plan to be described in the next section.

Mission Statement

Connect:

We connect deeply in community by purposefully and regularly...

- *engaging with each other through covenantal conversations*
- *opening our doors and our minds to people with diverse viewpoints*
- *sharing our activities with each other and with the local community*

Inspire:

We inspire reverence and spiritual growth by consciously...

- *bridging differences in theological perspective, cultural or racial background, age or stage in life, and ability in our worship services*
- *providing church members and friends opportunities to participate in worship*
- *weaving together multiple modes of communication through the use of a multi-arts approach to worship*

Serve:

We serve each other, our local community, and the world by intentionally. . .

- *being stewards of the church*
- *providing support to those experiencing hardship or distress*
- *working for social justice*
- *being caretakers of our environment*

Learn:

We pursue lifelong learning together by actively...

- *providing thought-provoking learning experiences for all ages*
- *encouraging respectful exploration and discussion of multi-faceted issues*

We summarize the above comprehensive mission description with the following mission statement for First Unitarian Church of Pittsburgh:

- ❖ *Connect deeply in community*
- ❖ *Inspire reverence and spiritual growth*
- ❖ *Serve our world community*
- ❖ *Pursue lifelong learning*

Section 3. Outcomes from Previous Year's Plan

This section reviews the priorities from the previous year's 2023-2024 Strategic Plan and summarizes progress on achieving those priorities. Progress on the previous year's goals informs the current plan.

Section 3A. Annual Priorities of the Church for Previous Year (2023-2024)

The **Priorities of the Church** for the 2023-2024 church year were identified as follows:

- Diversify And Grow Our Membership
 - Expand the diversity of our membership, especially in the areas of age, more children and families, race, class, ability and LGBTQ+ identities
 - Create a church full of activity and participation in order to grow our membership
- Create Long-Lasting And Meaningful First Unitarian / Community Partnerships Advancing Racial Justice and Environmental Justice
 - Partner with organizations, neighborhoods and other churches in our communities
 - Center our partnerships on advancing racial justice and environmental justice

Additionally, these **supporting activities** were identified. These activities can both increase our ability to achieve our two key priorities and are important objectives in and of themselves. We can work to identify specific actions that will address the following points.

- Improve communication, organization and coordination within the church
- Organize more church events, both internal and external. Internal events foster a sense of being in community. Outward-facing events attract like-minded people who might become partners or members.

Note that these Priorities and supporting activities are being continued unchanged into 2024-2025, based on the progress described below in Section 3B. The following Section (Section 4) describes our plans to continue and extend the progress we've made thus far.

Section 3B. Progress on Achieving 2023-2024 Priorities of the Church

During the 2022-2023 church year, the groundwork was laid to support progress on these Priorities. The Racial Justice Task Force advocated for adoption of the 8th Principle, with a successful congregational vote in October of 2022. This commitment demonstrated that we not only value diversity but agree to work to “build a diverse multicultural Beloved Community” by taking actions to “dismantle racism and other oppressions in ourselves and our institutions.” At the 2022 Annual Meeting the congregation unanimously approved a churchwide Environmental Justice (EJ) Initiative. The directive was “to commit to a year-long, church-wide focus on Environmental Justice, in order to take appropriate actions to address the issue.” At the end of the year-long initial focus, the BOT at its 2023 Retreat reaffirmed continuation of EJ focus and charged Environmental Justice Action Team (EJAT) with advancing this work “under the auspices of the Serve Council of the newly formed Council of Communities”

Subsection 3B.1 Progress on Priority 1: Diversify and Grow Our Membership

Has our number of members grown over the past year? We have considered this question in a few different ways. 24 individuals signed the Membership book between July 1, 2023 through June of 2024. This is an increase over the 2022-2023 church year, when 14 individuals signed the Membership book. But this does not give a full picture since it does not account for members we lose. The Stewardship Committee reports 188 pledges as of July 2024 versus 186 pledges in July 2023, but this view is not perfect for several reasons, including that it is a count of pledge units and does not distinguish individuals from couples, the balance of which likely changes from year to year. For our purposes here, we will use the membership numbers as reported to the Unitarian Universalist Association (UUA) annually on approximately July 1:

Year (on approx. July 1)	Number of Members Reported to UUA by Minister and Treasurer
2022	261
2023	231
2024	248

The numbers from the table show that the total number of members has been basically flat over the past few years, although it has fluctuated year to year. We notice new people showing up and those signing the membership book, but it is harder to notice people who have quietly become inactive.

In articulating the growth priority, we must be clear that we have not been advancing growth for its own sake but rather growth to spread the transformative power that Unitarian Universalism has in people’s lives. To do this, we know that we must provide a welcoming and inclusive experience for all who come through our doors.

The Fall 2023 Building a Culture of Inclusion all-church workshop with Paula Cole Jones helped us understand potential barriers to the shift in culture that can help us grow into a diverse multicultural beloved community.

Past work by the minister and church leaders identified many potential activities that could strengthen our “pillars of membership”. These pillars represent the steps that a member goes through in their journey at the church, from 1) learning about the church (advertising, marketing, word-of-mouth), 2) attending as a non-member, 3) going through the membership process, 4) being well-taken-care-of and contributing while a member, and eventually 5) exiting the church (ideally in a manner that communicates to others and to the member that their membership was loved and valued). Specific actions to support the pillars of membership will be prioritized and implemented in the upcoming year as described in Section 4B.1

As part of the Connect Council, the Membership Team has continued to help members and potential members connect with our church community and discover and pursue their own path to spiritual growth. The goal is to connect each visitor with a resource person or personal referral to a group of their interest, whether it be choir, adult or child religious education (RE), Young Adults, Women’s Alliance, Men’s Gathering, Humanist Group, Racial/Environmental Justice, etc.

The Membership Team staffs the Welcome Desk each Sunday, and plans and attends the ‘Introduction to UU’ and ‘RUaUU?’ sessions (Steps 1 and 2 of the pathway-to-membership series) throughout the year. ‘Introduction to UU’ sessions were held each month following the church service. ‘RU a UU?’ orientation sessions were held 4 times this past year, on Saturday mornings. The team also followed up with the 100+ individuals who visited and expressed interest in our church over the past year. Of the 100+ new visitors in the 2023-2024 church year (July 1, 2023 to June 30, 2024), 37 individuals entered the membership pipeline by participating in an ‘Introduction to UU’ session, the first step of the formal pathway to membership. 13 of these individuals subsequently attended ‘RUaUU?’ and signed the Membership book in the 2023-2024 church year. Note that some individuals take more than one year to complete the pathway to membership, some never complete the pathway, and others complete the pathway and join the church in a relatively short span of time.

Input from Two First Unitarian Communities about Our Diversity and Inclusivity

Young Adults (YA)

Recognizing the critical importance of age diversity to a healthy church, the VIM Committee held two cottage meetings with young adults and one cottage meeting with RE parents in the spring and summer of 2024. The young adults who participated conveyed that they are coming to church to be part of a multi-faith community where they can build connection with peers in a deep and meaningful way. They have felt largely welcomed and supported, especially as this demographic has grown at church. After the cottage meetings had happened, several young adults left the church in reaction to the recent departure of our Young Adult coordinator. Our minister Rev. Kate Walker and our Lifespan Religious Education Director (LRED) Erica Shadowsong are working to re-strengthen ties with young adults who have remained with the church, and to eventually hire a new Young Adult coordinator.

Religious Education (RE) Families

Discernment with RE Families gave us insight into the strengths and challenges of our church programming for children as we rebuild post-pandemic. While we are getting new families visiting just about every Sunday, tracking and retaining these families and helping them become woven into the church community will require focus and resources. Parent volunteerism in RE classrooms has been

getting stronger this year and the RE teacher experience has been rewarding for many parents. We currently lack a staff RE assistant, a childcare provider during Sunday services, and programming for middle school teens, especially OWL (Our Whole Lives) and COA (Coming of Age). These shortcomings have unfortunately made us less welcoming and less supportive of families than we could be. Parents are looking for connection and friendship and opportunities for service for themselves and their children; they are also looking for excellence in programming around UU values.

COSM Report on Current Status of First Unitarian's Hospitality and Inclusivity

In 2024 the Committee on Shared Ministry (COSM) conducted a remarkably thorough and thoughtful assessment of the congregation on two questions that are key to our priority of growth and diversity:

- How prepared are we to grow?
- How welcoming and inclusive are we as a community?

The COSM assessment used several approaches to assess the Hospitality and Inclusivity of First Unitarian Church with questions based on the UUA's "Assessing Your Hospitality" tool:

- Reviewing the church website, social media, and signage of First Church.
- Interviewing members of the church committees most directly involved with providing inclusivity/hospitality.
- Conducting a survey of our congregants, using the full Mailchimp and Breeze mailing lists.

COSM's report concluded that "The state of our Hospitality and Inclusion at First Unitarian Church of Pittsburgh is good." Our worship services, RE programming, church website, social media, and signage are generally perceived as welcoming and inclusive.

Nevertheless, from COSM's assessment we also inferred recommendations for improvement in the following six areas:

1. More integration of "all ages" content in our services to make them more participatory and accessible to children
2. More readily accessible information about First Unitarian Church's worship services, programs and volunteer opportunities
3. More proactive greeting of visitors, particularly introducing them to congregants during coffee hour and engaging them in conversations
4. More accessible large-print items and hearing assistance devices for visitors who might need them
5. More week-to-week continuity in RE classes through volunteers and/or paid staff, including for children with special needs
6. Broader RE age coverage with programming for middle/high school students, including Coming of Age and Our Whole Lives (OWL)

These items inform the 2024-2025 Strategic Plan and are reflected in the goals for the next three years.

Subsection 3B.2 Progress on Priority 2: Create Racial and Environmental Justice Partnerships

Accomplishments of the Environmental Justice Action Team and the Racial Justice Task Force included building partnerships with organizations and other communities outside the walls of First U(U). Some examples:

- Strengthened partnership with grassroots Environmental Justice organization Valley Clean Air Now (VCAN) by:
 - eight congregants attending public hearings and submitting comments to EPA and the Allegheny County Health Department;
 - collecting over 200 signatures from six churches including 30 from First Unitarian congregants for letters to EPA and Senator Casey;
 - raising approximately \$2500 through Share the Plate;
 - raising \$340 for air filter replacements;
 - hosting VCAN leaders Qiyam Ansari and Tom Bailey for October 8 Sunday service;
 - hosting presentations by local air quality activists including filmmaker Mark Dixon, Lisa Graves-Marcucci of the Environmental Integrity Project and Ana Hoffman from CMU's CREATE Lab.
- Began a partnership between First U(U) and Bethel AME, the oldest Black Church in Pittsburgh, in support of reconciliation and reparations by:
 - Implementing a book discussion series on Reparations;
 - hosting Bethel AME Church leaders and congregants for a luncheon and Reparations Table Talk;
 - raising \$25K through a Social Justice Endowment grant and Share the Plate, paid directly to the Bethel AME Church
 - supporting Bethel AME Church leaders in developing a plan to document the history of their Church, including the tragic story of its demolition in 1957.
- Strengthened our relationship with the Pennsylvania Interfaith Impact Network (PIIN) to build power for social action, primarily through the Integrated Voter Engagement (IVE) project. Specifically, ten congregants participated in deep canvassing in the frontline communities of Swissvale, Rankin, Braddock, and Clairton.
- Continued active engagement with UUJustice PA, including its Environmental Justice, Gun Violence Prevention, and UUtheVote teams.
- Increased congregational involvement in the advocacy work of CeaseFire PA. Twelve congregants travelled to Harrisburg to attend the End Gun Violence Advocacy Day on May 7, 2024.
- Strengthened musical collaborations with Lemington Gospel Chorale and Coro Latinoamericano

Subsection 3B.3 Supporting Activities: Improve Communications and Organize More Church Events

Achievements related to 'Supporting Activities' include:

- Launch of the new ‘Community of Communities’ organizational structure, with lay leaders or lay leader teams managing and supporting church groups that fall under the four different branches of the First U(U) Mission: Connect, Inspire, Serve, Learn
- The October 2023 all-church workshop ‘Building a Culture of Inclusion’ prepared our congregation to address our identified annual priority of promoting growth and diversity. This is essentially the Eighth Principle in action, calling us to build authentic Beloved Community right here in our church.
- Multigenerational game nights have helped to bring our community members and guests together for fun social interaction.
- Initial plans to restart the Forum, including creation of a new Forum Committee and holding a “Forum on the Forum” on June 23.
- The Humanist Group organized an all-church Thanksgiving meal gathering, a festive occasion that had not been celebrated since pre-pandemic times.
- Rev. Kate introduced a New Year’s Pancake breakfast event to bring the whole congregation together in community. Note that this cannot continue to fall on the minister’s shoulders. We must find alternative leadership to continue this wonderful new tradition.
- Rev. Kate also spearheaded a spring picnic at a local park. This too will require alternative leadership going forward.
- A member of the Stewardship Committee assembled a Fantasy Auction team to put on this fundraiser, a successful all-church event that had not been held in many years.

Section 4. Three Year Strategic Priority Plan

The governance framework for First Unitarian involves a rolling, year-by-year approach to long-term strategic planning. Rather than forming a temporary planning committee every five or ten years, long-term strategic planning is embedded within the VIM process. The VIM Committee works with the Board and Staff to develop Open Questions that are designed to elicit the top concerns and aspirations of congregants. Responses to Open Questions are then distilled into an annual list of near-term **Priorities of the Church**. These Priorities are not simply consistent with our living mission but are the sections of the mission that all stakeholders feel are critical to focus on in the coming year. The Priorities of the Church are created from feedback from the congregation and through an iterative process between the Board and the ministerial staff. These Priorities then guide the implementation plans written by the staff and Board (see Section 5) and anchor a **Three Year Rolling Strategic Plan**. Therefore, the Board, the staff, and the congregation are all engaged in both short- and long-term thinking every year.

Based on encouraging progress during 2023-2024 on that year’s goals, we have concluded that it makes sense to retain those goals. They are described in full above, in section 3A.

The three-year plan advances this year’s Priorities: diversifying and growing our membership and creating lasting and meaningful First Unitarian / community partnerships advancing racial justice and

environmental justice. To engage the Congregation in these Priorities, discernment activities in 2024-25 may continue to address how we can best grow and support a diverse, multicultural, multigenerational community of communities, and what actions First U might take to effectively impact social justice issues.

Subsection 4B.1 Diversify and Grow Membership

Actions to strengthen our “pillars of membership” will be implemented as feasible this year. Specific potential actions include:

- Work with partner UU churches in the Pittsburgh region on joint promotion
- Make sure potential members are connected to a member who can help them go through the membership process
- Encourage new members and visitors to participate in at least one activity beyond attending services
- Quickly identify and provide support to current members who are at risk of leaving
- Identify, collect, and report on specific data that will help us understand how well or poorly we are accomplishing these tasks (e.g. the percentage of visitors who enroll in, and complete, the membership process)

These activities should build on existing successes. For example, the introduction of Breeze has allowed us to better communicate with our membership, understand their membership status and identities, and support their stewardship goals. Likewise, a small but committed Membership Committee has helped to create a positive membership process for visitors that can continue to evolve.

We will need to both act on, and build on, the bulleted ideas above if we are to both diversify and grow our membership. When thinking about diversity, we must recognize roadblocks that must be removed before we can take action on new ideas. For example, better advertising our church to traditionally underrepresented identities will probably not work if the culture of the church still feels unwelcoming to their full participation. Diversifying and growing our membership will require a “whole-of-church” approach.

We believe we need a transformative culture change that will allow us to make progress on this priority, namely a shift from thinking of church as family to thinking and working within our church as a community of communities. The family metaphor is too small and constrictive with its insularity and hierarchy of power. From Paula Cole Jones: “A Community of Communities approaches cultural change and growth by shifting focus from individual voices to community voices and building equity and well-being into our systems. Communities provide landing places for belonging and opportunities for growing our members and our membership. A Community of Communities strengthens the foundation for both diversity and unity.”

An eight-member team from the First Unitarian Racial Justice Task Force (RJTF) will join Paula Cole Jones this year in a 12-month workshop series for UU congregations around the country, titled ‘Community of Communities: Shaping the Leading Edge’, to explore UU identity and pluralism as foundational to congregational growth and to learn practical tools for this kind of systemwide change.

Our Religious Education (RE) Department is connecting with the Racial Equity Consciousness Institute (RECI) in the School of Social Work at the University of Pittsburgh to explore participation of an initial cohort of our RE Parents in PREP (Parenting for Racial Equity Project). PREP aims to equip White parents with perspectives and tools to support antiracist journeys in their families and beyond.

Subsection 4B.2 Create Partnerships Advancing Racial Justice and Environmental Justice

This section primarily describes our two ongoing partnerships with Valley Clean Air Now and with the Bethel AME Church. In the upcoming year, discernment efforts will continue to identify additional partners that help advance our social justice goals. Examples of potential partners include NAACP Pittsburgh, Allegheny County Jail Oversight Board, New PA Project, 412 Justice, Tree Pittsburgh, Garfield Community Garden, Upstream Pittsburgh, and Grounded Strategies.

Environmental Justice Partnership

Plans for building Environmental Justice partnerships include two thrusts. One is building power to strengthen our existing partnership with Valley Clean Air Now (VCAN). The second is building a broader base of action by considering EJ issues and actions in addition to air quality. These two thrusts are described more below.

Building a Power Base for Action

This thrust has emerged from ongoing interactions with PIIN (Pennsylvania Interfaith Impact Network), and specifically from training several of our members received from the community organizing organization Gamaliel of which PIIN is a member. At the training we learned that social justice goals are best achieved by building a base of power. Gamaliel defines Power as “the ability to work in concert with others to influence”.

Our church’s Environmental Justice Initiative initially focused, understandably, on our own members. We achieved some goals as a single church, but we soon recognized the value of working with other churches. For example, one of our achievements was providing 30 signatories to a letter written to Senator Casey by the Environmental Integrity Project (EIP) calling his attention to dangerous benzene emissions. By working in concert with five other PIIN churches, we were able to provide a total of 143 signatories to that letter.

But building significant power requires going beyond even multiple churches. It involves reaching out to the frontline communities whose residents we wish to help. PIIN and Gamaliel are using a deep canvassing technique called Integrated Voter Engagement (IVE) to help build a base of community power. IVE helps us discern what issues are actually important to residents. The goal this year is to knock on 12,000 doors in Mon Valley communities including Swissvale, Rankin, Braddock, and Clairton.

Discerning Issues for Effective Action

Our church’s EJ focus on air quality was identified based on VIM cottage meetings during the Spring of 2022. Air quality emerged as the single issue that attracted the most interest and concern. However, several other issues attracted significant interest including water quality, urban gardening, and green spaces.

Similarly, PIIN engaged in a discernment process as it established an Environmental Justice Task Force in May 2023. While air quality also emerged as PIIN’s EJ focus, it was clear there was significant interest in other issues. And, as we engage in IVE deep canvassing, we are hearing directly from residents in EJ frontline communities what their chief issues and concerns are.

Based on discernment in our church, in PIIN churches, and in frontline communities we plan to identify one or two additional EJ issues for which there could be a critical mass for effective action. Working on more than one issue offers the opportunity to build a bigger, stronger EJ effort. We will bear in mind that we don't want to dilute our ongoing air quality emphasis — but we anticipate that adding another issue is likely to be synergistic rather than competitive.

Racial Justice Partnership

Plans for deepening our partnership with Bethel AME Church in the Hill District will involve social connection with members and clergy from Bethel as well as support for Bethel in documenting and publicizing their history, a compelling Pittsburgh and more broadly American story about race. The partnership has given us a prime opportunity to better understand and carry out reparations in a multi-faceted way, to include not only the repair of wealth, but the repair of truth and power as well. All three facets will guide the steps we take. For example, in acting on the repair of truth, and growing out of the reparations book study groups from earlier this year, the Racial justice Task Force (RJTF) will launch a monthly RJ film/discussion series for our congregation and friends.

Building a broader base of action on the racial justice front will be initiated with a newly forming partnership with the NAACP (National Association for the Advancement of Colored People) Pittsburgh Branch, an organization with a long history in Pittsburgh and one actively engaging an array of RJ issues.

Subsection 4B.3 Supporting Activities

As an example of a supporting activity, the church could create cross-organization communication or coordination efforts to identify potential community partners. This would ensure that the same organizations are not being contacted by multiple groups, nor that potentially valuable partners are known to only a limited set of congregants. Likewise, a church-wide event could draw on the skills of many different church groups and committees, and bring in a variety of new members who contribute to multiple forms of diversity. Each group or committee within the church should think about ways that it can exercise these Supporting Activities, both alone and, especially, in coordination with other parts of the church.

Streamlining and coordinating communication will also be important moving forward. Social justice activities are often presented by external partners with little advance notice, so an effective way to communicate these kinds of opportunities to congregants would be beneficial.

The goal of having more outward-facing events will be addressed by restarting the Forum this Fall. Sunday Forum has been reimagined in a Community of Communities model, with individual communities from the congregation working together to identify and invite speakers across a range of intersectional topics that align with and promote our UU values. Initially Forum will be held on the second and fourth Sundays of each month, starting September 22.

The chart below highlights specific activities to support belonging and connecting with external communities, to extend the work done during the 2023-2024 church year. These activities are meant to be fleshed out and expanded upon in the Plan of Ministry and implemented by the Staff together with congregation members, side by side with the many other activities that make up the life of First

Rolling Strategic Plan 2024-2027 First Unitarian Church of Pittsburgh

Unitarian Church. The chart includes specific goals for each priority over three years with most detail in the first year. Depending on the nature of the goals, some will probably be achieved within a single year while others may span multiple years. To provide background and context for all the goals, subsections 4B.1, 4B.2 and 4B.3 above provide specific examples of steps we can take to advance both the two priorities and the supporting activities.

First Unitarian Church is at an inflection point in its history. These next few years will be critical to determining the culture of the church and the direction of future activities for years to come. Thus, these years are a time of discernment and thoughtful reflection with a goal of unifying energies and coming to consensus on how we can take diversity of thought and background and turn it into unity of purpose.

2024-2025	2025-2026	2026-2027
Open Questions conversations	Open Questions conversations	Open Questions conversations
<p>Diversify And Grow Our Membership</p> <ul style="list-style-type: none"> ● Continue to identify barriers to improving diversity, which must be understood and overcome before wider outreach can begin ● Develop clear actions, and identify the people/groups responsible for each, to support people through each stage of the membership journey ● Implement the actions listed in Section 4B.1 (see bullets p. 11) ● Provide big screens and hearing assist technology in Sanctuary to enhance multi-generational services and share programming info ● Make multi-generational services more age/family inclusive ● Evaluate hiring childcare staff for infants & toddlers during Sunday services ● Extend greeter activities to after church/coffee hour 	<ul style="list-style-type: none"> ● Identify specific Community of Communities efforts that could increase the diversity of members, especially within the 4 priority categories (age, children/families, race/class, LGBTQ+ identities) ● Examine changes in the external environment (community changes, political/social changes, changes within the UU community at large) and adjust actions to align with these opportunities and threats ● Identify, as appropriate, specific targets/metrics for how we will measure success on this priority ● Train RE teachers on working with special needs children ● Gauge member interest in Parenting for Racial Equity Programming 	<ul style="list-style-type: none"> ● Review results and adjust specific actions to amplify what seems to be working and replace what doesn't seem to work ● Provide and support SERVICE opportunities for children and families

<ul style="list-style-type: none"> ● Re-establish teen programming, including OWL and COA (Coming of Age) 	<ul style="list-style-type: none"> ● Evaluate hiring an RE Assistant 	
<p>Create Long-Lasting And Meaningful First Unitarian / Community Partnerships Advancing Racial Justice and Environmental Justice</p> <ul style="list-style-type: none"> ● Build power to enable justice <ul style="list-style-type: none"> ○ Engage in community organizing, including through Integrated Voter Engagement (IVE) ○ Expand our participation with PIIN, including in PIIN's task forces, committees and Board ○ Expand participation in UUJusticePA projects as appropriate ● Continue community music collaborations to grow Beloved Community ● Strengthen and deepen our relationship with Bethel AME Church to support their community, their land development project and the documenting of their history, as ways to participate in concrete local reparations ● Launch a Racial Justice Film Series open to the congregation ● Develop a relationship between our church and the Pittsburgh branch of the NAACP ● Continue and expand current relationship with Valley Clean Air Now (VCAN) ● Influence local/state/national decision makers – such as Sara Innamorato -- to enforce new/emerging air quality regulations ● Document and publicize the church's carbon footprint reduction due to our <ul style="list-style-type: none"> ○ Geothermal heat pump HVAC system ○ LED lighting upgrade 	<ul style="list-style-type: none"> ● Deepen relationships with potential/emerging partners. Become a trusted resource for action and advocacy ● Organize 2-3 public-facing EJ/RJ events at church ● Cultivate relationships with area publications such as Post-Gazette, Tribune Review, Pittsburgh City Newspaper, Allegheny Front, New Pittsburgh Courier, Pittsburgh Jewish Chronicle, and Shady Ave Magazine ● Achieve visibility in local radio and TV stations such as WESA ● Offer to host an online event for UU Ministry for the Earth (UUMFE) – build on our article and video published on the UUMFE site ● Offer to host an online event for Interfaith Power and Light (IPL) based on our justice work 	<ul style="list-style-type: none"> ● If appropriate and welcome, participate in leadership of community justice organization(s) ● Establish ongoing EJ/RJ discussion/lecture series ● Become regular content contributors to area media outlets

<ul style="list-style-type: none"> <input type="radio"/> Solar panel installation <input type="radio"/> Composting initiative <input checked="" type="radio"/> Expand public advocacy in support of racial and environmental justice through area media outlets 		
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- VIM - Vision, Identity, Mission Committee
- COSM – Committee on Shared Ministry
- Mem – Membership Committee
- MCC - Marketing and Communications Committee
- PCT - Pastoral Care Team
- BGC - Building and Grounds Committee
- AFD - Adult Faith Development Team
- CYRE - Children and Youth Religious Education Team

Section 5. Staff implementation of strategic priorities

See separate Plan of Ministry 2024-2025 document. This plan has not yet been developed.

Section 6. Plans for assessment

Assessment is a required feedback mechanism to judge how well our actions match our declared priorities and how well we are carrying out our declared plans. To help carry out this assessment, the Board has chartered the Committee on Shared Ministry (COSM) to assess, in alternating years, 1) the Minister, and 2) prioritized aspects of the Congregation. COSM will evaluate the entire Congregation at least every 5 years. Their feedback will be reported to the Board prior to the Board retreat so that it can be incorporated into planning for the next year. Relatedly, the Board has agreed to undertake a self-assessment every year, and the UUA has agreed to conduct a Board assessment every other year. Brief summaries of these various assessments will be reported to the congregation. Not all of these assessment efforts will directly assess the goals of the Strategic Plan, however. Additional mechanisms will be needed to make the assessment process more robust. The Board, Minister and Congregation should work together to develop this Strategic Plan Assessment.

Appendices

Appendix A. Brief History of First Unitarian Church

This document is a strategic plan that lays out a vision for the future of our church and a plan for how to achieve it. That vision is rooted in an identity that springs from the individual and collective histories of the members of the church. In that spirit we briefly review below some highlights of the history of the First Unitarian Church of Pittsburgh that provide context for planning our future. A much more detailed - and thoroughly enjoyable -- account can be found in the book [Here We Have Gathered](#) by long-time church member and past Board president Kathy Parker.

The origins of Unitarianism in Western Pennsylvania can be traced back as far as 1820. First Unitarian Church of Pittsburgh was founded officially in 1880 and has been in its present location since 1904. It attained prominence in the Pittsburgh region in the early part of the 20th century, as indicated by its broadcasts on KDKA radio from the 20's into the 60's. The church grew significantly in the 1950's, reaching a membership of over 1000 by the end of the decade. In the mid 1960's First Unitarian also helped spawn three suburban congregations, which still exist half a century later.

The church membership declined markedly during the late 60s and into the 70s, largely due to contention over how to respond to the challenging issues of Civil Rights and the Vietnam War. It was also a time of staff turmoil with the involuntary departures of three of four ministers over a twenty-year period. The church stabilized during the 80s under the leadership of noted humanist minister Paul Beattie. Kathy Parker's church history notes (pages 347-348) that Rev. Beattie had a less activist perspective than many in the congregation. He felt that churches should not take a political or social stand, preferring instead that individuals and groups act according to their own consciences.

Following Beattie's tragic untimely death in 1989, David Herndon led the church from 1990 until the end of 2018. Rev. Herndon brought a renewed emphasis on social action, particularly racial justice. Under his leadership, the church instituted the Black Concerns Working Group (later called the Anti-Racism Committee), joined the Pennsylvania Interfaith Impact Network (PIIN), and became active in the Unitarian Universalist Pennsylvania Legislative Advocacy Network (UUPLAN, now UUJusticePA).

During Rev. Herndon's tenure, the church broadened its music program with a folk orchestra and family choir, making the music less external performance-based and more home-grown. It also initiated the beloved Covenant Group program that promotes deep connections among members who meet in small groups. A campus ministry program was begun in 2002 to take advantage of our proximity to major universities.

During this time, five members of the congregation experienced a call to ministry, subsequently attending theological school, becoming ordained, and serving in parish or community ministries. Rev. Herndon served as supervisor for seven student ministers who completed their internships or field work at First Unitarian Church.

The church grew and prospered financially in the first decade of this century. As part of its effort to become a more multi-cultural, multi-racial congregation, the church in 2009 took the bold step of calling Alma Crawford, an African American woman, as Associate Minister. Regrettably that undertaking failed, and Rev. Crawford left the church in 2011. Around the same time, the church considered an ambitious

plan to construct a new wing with religious education and meeting facilities but found that the church financial resources were not adequate to pursue it. Instead, considerable investment in upgrading our existing church buildings has been undertaken using funds bequeathed for capital improvements. Like many other churches around the country, First Unitarian experienced significant decline in membership in the past decade. The resulting drop in pledge income led in 2016 to the termination of the contract of Assistant Minister Robin Zucker and a significant contraction of the music program. Reverend Zucker had served in this position since 2012 and was much beloved by many in our church community.

In response to challenges such as these, the Board reached out to the UUA in late 2015 for guidance. Following that guidance, the Board modified church governance as described in Appendix B. The new framework fosters strategic governance by the Board of Trustees that focuses on five key roles -- resource oversight, policy management, discernment, strategic planning, and assessment of the church's ministry.

Key to the effective governance and ministry of the church is a system of transparent communication that ties together the congregation, the church staff, and the Board of Trustees. To facilitate that open communication and to provide a mechanism for conflict resolution, the Board in 2017 established the Healthy Congregation Collaborative (HCC). The HCC participated in the strategic planning process by helping to facilitate cottage meeting discernment.

During most of Rev. Herndon's tenure, Jennifer Halperin led the church's religious education. Jennifer held the position of Director of Ministries with Children and Youth from 2001-2015, beginning as DRE in 1999. When she retired from the position, the congregational emphasis on faith development for all ages led us to create the position of full-time Lifespan Religious Education Director. In 2017, we welcomed Erica Shadowsong as our full-time LRED.

In early 2018, Rev. Herndon and the Board announced Rev. Herndon's negotiated resignation effective December 2018 after 28 years of heartfelt and creative leadership. Until hiring an interim minister to take First Unitarian through the process of calling a new settled minister, church members energetically and ably lead Sunday services with immense support from Erica Shadowsong, Director of Instrumental Music Ellen Gozion, and Director of Vocal Music Kris Rust. Rev. John Ballance was contracted part-time to support our pastoral care and new member efforts until the arrival of interim minister Reverend Connie Grant in August 2019.

In 2021, following a robust search, Members called Rev. Dr. Kate Walker as our first female called Minister.

Appendix B. Strategic Planning Process

This section describes the process that is used each year to produce an updated Three-Year Strategic Plan. Subsection B1 describes our governance framework, a framework which provides the foundation of the strategic planning process. Subsection B2 describes the process we are using to discern the identity, vision, and mission of our members. Subsection B3 describes the annual discernment and planning cycle including participants, timeline, and major documents produced.

B1. Our church governance framework is the foundation of planning

First Unitarian Church adopted a new governance framework in 2017. The framework is based in part on the book Governance and Ministry by Dan Hotchkiss. It has also been informed by consultations with Rev. David Pyle and Rev. Joan Van Becelaere of the UUA Central East Region. The overall structure of the church within our new governance is described here to provide context for how strategic planning occurs within the larger operation of the church community. The structure is summarized graphically in Figure B1.

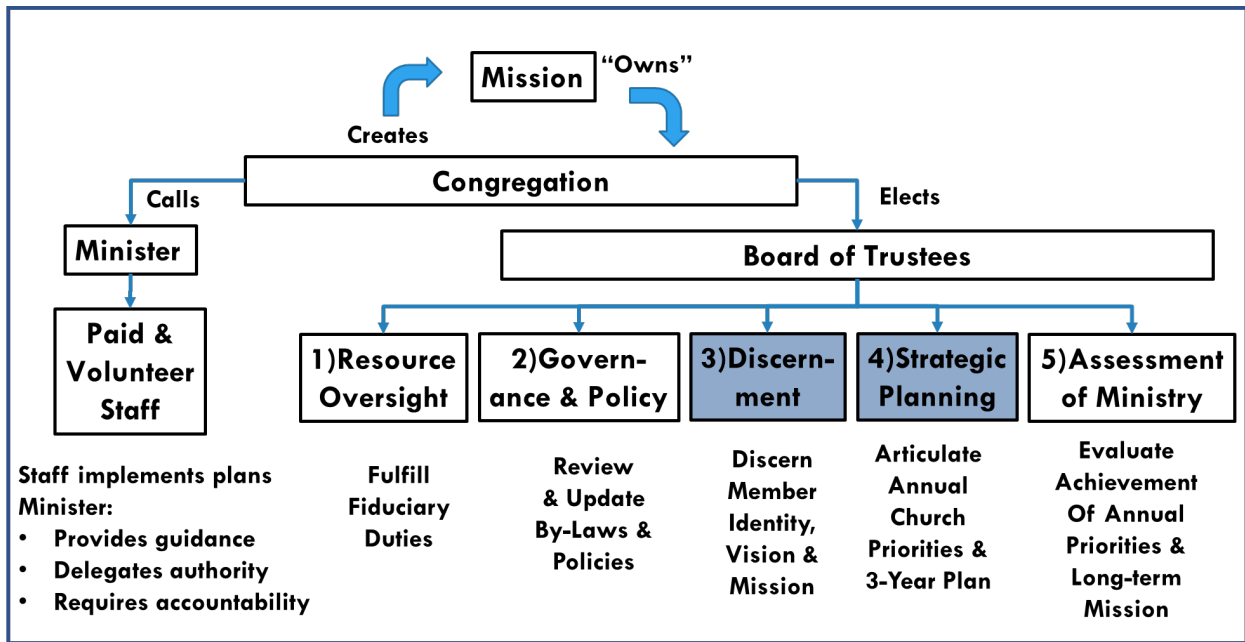


Figure B1 Governance framework of First Unitarian Church of Pittsburgh.

At the center of the church, of course, is the congregation. There is no church without a congregation! Through an ongoing process of discernment as described in Appendix subsection B2, the Board articulates the church’s mission based on input from members of the congregation. Other sections of this document discuss mission in more detail (See p. 4). Our current mission statement, initially articulated in 2012, involves the four facets connect/inspire/serve/learn. Our congregation will continue to revisit and possibly revise our mission in the coming years.

In our governance model, it is the mission that ultimately “owns” the church as explained by Hotchkiss (Governance and Ministry, 2nd Edition, pp. 70-71). Ownership in this case means that the mission provides the guideposts for major church actions and decisions. This may seem a bit circular since the mission emerges from the congregation – but, once a mission is defined, it exists for an extended period of time and it helps shape the annual priorities of the church (congregation, staff and Board) until a new mission is created.

Besides being the ultimate source of the mission, the congregation performs several key governance functions:

- It calls a Minister.
- It elects Board of Trustees members each year.
- It can directly pass policies and other decisions for the church.

Within our new governance the Board performs five major functions. They correspond to the five numbered boxes in Figure B1. The two shaded boxes are particularly relevant to this document. The major Board functions are:

1. Fiduciary responsibilities. This is the key job of “minding the store” including financial management. One member of the Board is designated as the Treasurer who is assisted by a Finance Committee
2. Governance and policy. Setting policy is a critical aspect of policy governance. Board members, led by the Secretary, periodically review and revise the church’s By-Laws subject to Congregational approval. The Board is also responsible for producing policy documents.
3. Discernment. Discernment is an ongoing process of conducting member conversations about Open Questions and determining from them the best understanding of the congregation’s identity, vision and mission. The final product each year of the discernment process is a list of the Priorities of the Church for the upcoming year. This is a short, high-level list that becomes the centerpiece of the annually updated Strategic Plan. This Board function is facilitated by the VIM Committee.
4. Strategic Planning. This Board function is closely tied with discernment and is also facilitated by the VIM Committee. Strategic planning builds on the goals stated in the Priorities of the Church document. It sets specific objectives and timelines that are detailed enough to be implemented by church staff and members, and to be evaluated through the assessment process. We have decided to embody our planning as a three-year, rolling Strategic Plan.
5. Assessment. The final major component of the Board’s work is assessment. This includes, but is more than, an assessment of the Minister and the staff. It is a comprehensive assessment, carried out in part by COSM, of how the church in its entirety is achieving its annual priorities as well as its longer-term mission.

B.2 Discernment of Identity, Vision, and Mission

Within the governance framework summarized above, the Board of Trustees has two primary planning responsibilities – discernment and strategic planning.

Discernment is the process of coming to a better understanding of the essential characteristics of the congregation -- of its identity, vision and mission. Briefly, they can be summarized as:

- Identity is who we are now
- Vision is who we want to be
- Mission is how we get there

Identity can be a complex issue for UU churches. Our denomination and our church feature great diversity. We are rightly proud of our diversity, and it is a great strength. On the other hand, it can pose significant challenges. Congregations can sometimes segment into groups based on differing member identities. If the groups turn inward and have little interaction with the larger congregation, the sense of church identity is weakened. The process of identity discernment begins with conversations where all members are invited to participate and articulate their personal identities. Our inherent diversity precludes a one-size-fits-all statement of identity. But the discernment process fosters communication among all members so we can acknowledge differences and more deeply appreciate our similarities.

Discernment of Vision builds on identity. Our vision emerges in part from who we are now. But our vision also incorporates the possibility and promise of change. We may be dissatisfied with some

aspects of our current identity and want to make changes. When we envision a desired future, we must be realistic about the constraints of people and resources. But we do not want to be unduly limited by those constraints, so the vision discernment process invites members to imagine ten or more years into the future.

Mission returns more to the present by addressing what part of our vision we want to work on in the immediate future – say, the next five to ten years. On the one hand, it needs to be realistic and achievable. On the other hand, it should build toward a compelling and exciting vision.

The church’s mission can evolve slowly over time. Our current mission – Connect-Inspire-Serve-Learn – emerged in 2012 through a process that predates our current governance structure. It initially included only the first three components, with ‘Learn’ added later. In general, an expression of Mission may persist for a decade or so. But the church makes plans to achieve its mission on an annual basis. Accordingly, each year the discernment process also produces a document called the Priorities of the Church. These priorities form the core of each year’s strategic plan.

In order to establish the discernment process within our church’s life, the Board has approved the VIM Committee Charter. The VIM Committee is comprised of six church members, two of whom are on the Board. This structure assures deep and continuing Board involvement, while maintaining majority participation by non-Board members.

B.3 Discernment, planning and assessment are built into the annual cycle of governance

Our church operates on an annual cycle where a new Plan of Ministry guides the implementation of activities beginning with In-Gathering in September. The plan for any given year is developed during the previous year starting with a retreat in July involving the new Board and the staff. The entire annual cycle is summarized at a high level in Figure B2 and described in the following text.

Democracy and Partnership Drive the Church’s Annual Cycle of Reflection and Planning

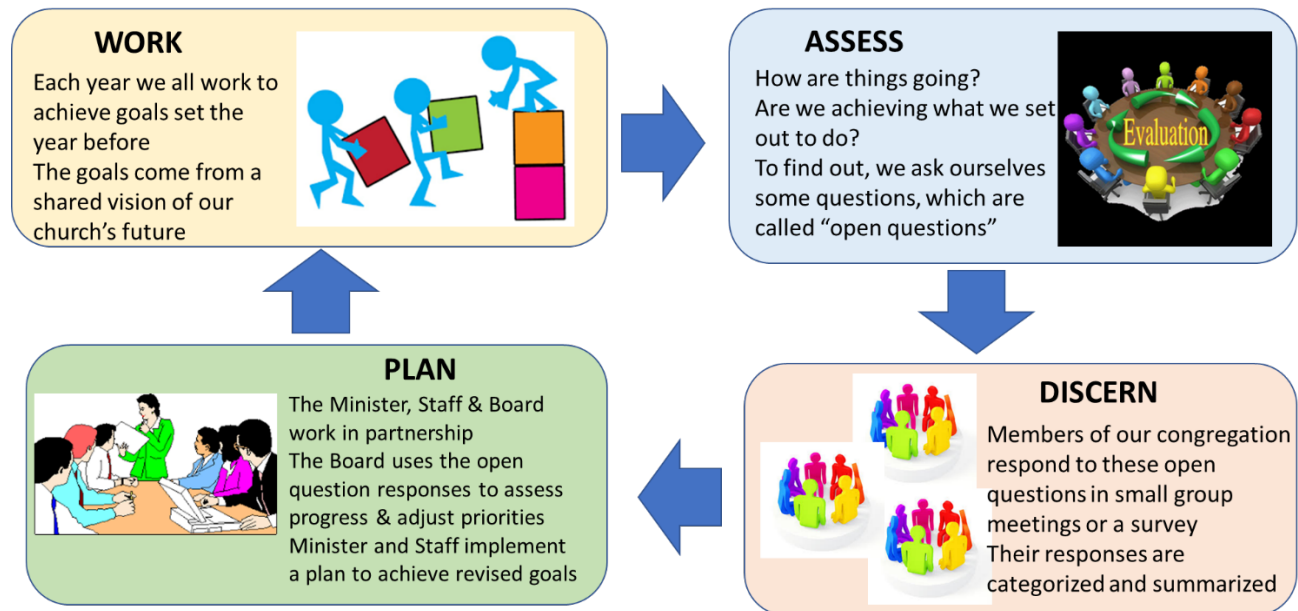


Figure B2. Steps in the annual cycle of discernment and strategic planning

WORK. The cycle of discernment and strategic planning begins in the Summer following the Annual Meeting in May. The Annual Meeting includes a written report of the accomplishments of the church during the previous year – the “work of the church”. Beginning with the 2023-2024 church year, that work should largely embody the strategic plan for that year – i.e., this document.

ASSESS. Each year, as described in Section 5, COSM and possibly other church bodies perform an assessment of how well the previous year’s work achieved the goals stated in the strategic plan for that year. The results of the assessment provide guidance for how plans could be modified for the coming years. In particular, they are an important input for determining open questions to inform the discernment and planning processes.

DISCERN. Following the Board Retreat and other planning activities of the Board and Staff during the Summer, the VIM Committee conducts a discernment process that may involve small group (“cottage”) meeting, a survey, or other means. The discernment topics are Open Questions determined by the Board in consultation with the Staff and the VIM Committee. The selection of topics also takes into consideration the assessment of the outcomes of the previous church year. Responses to the Open Questions are categorized and summarized and are the basis for determining the Priorities of the Church for the upcoming years.

PLAN. The VIM Committee produces a draft Priorities of the Church document that identifies congregational priorities that will best advance the mission and move toward the shared vision. That document is submitted to the Board and staff for review and modification. The approved document is presented to the congregation for review and feedback at or soon after the Annual Meeting in late May. Incorporating feedback from the congregation or from communities within the congregation, as well as the Board and Staff, the VIM Committee prepares a draft of the 3-Year Strategic Plan. The plan also incorporates assessment results from the previous year. The draft is submitted to the Board in June as feasible for final approval in July. The Staff then prepares a Plan of Ministry to implement the Strategic Plan. In parallel, the Board and Staff begin the planning process for the following year. The planning process follows this cycle annually, producing a revised 3-Year Strategic Plan each year.