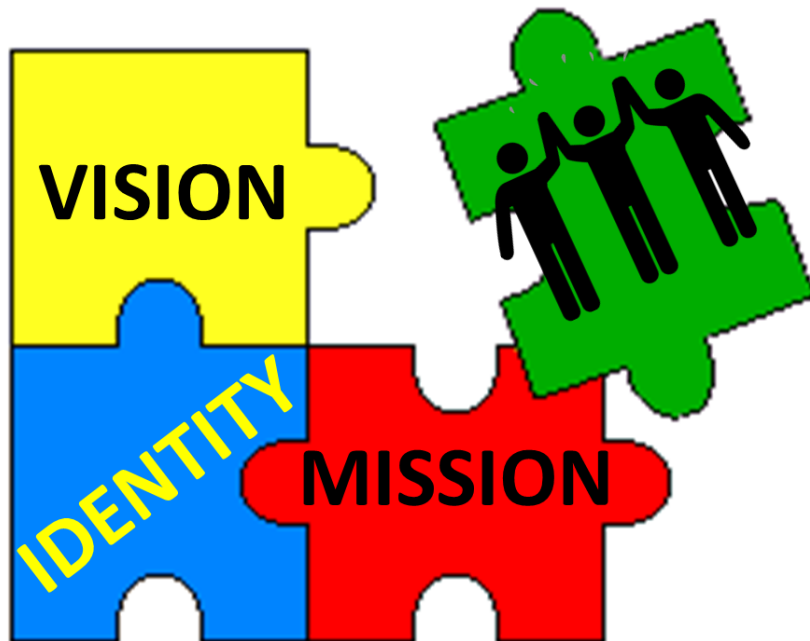


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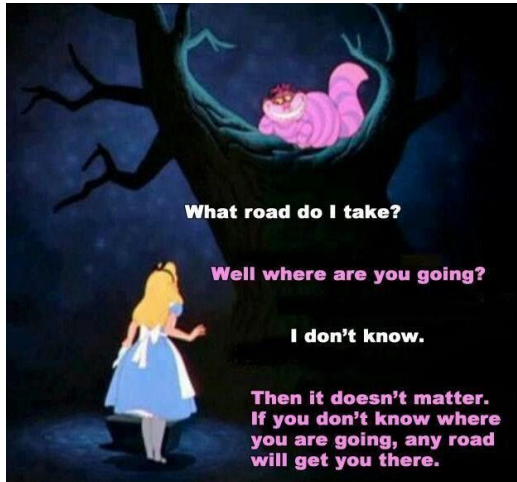
First Unitarian Church of Pittsburgh

July 2019



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 new governance of our church, 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 consists of the following sections:

- Section 2 gives a very brief synopsis of our history, with emphasis on the past several decades, in order to provide context
- Section 3 explains our strategic planning process, which includes discernment of the priorities of members of our congregation
- Section 4 states the most recent mission statement of the congregation that has emerged from the discernment process
- Section 5 describes the identified annual church priorities that have arisen from the congregational conversations and have been vetted by the Board and Ministerial Staff
- Section 6 summarizes the role of the church staff in implementing the strategic plan
- Section 7 describes the assessment process that provides feedback on how well the current goals are being achieved, and what changes may be warranted

2. Where We Are Now

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 Church also helped spawn three suburban congregations, which still exist half a century later.

The church 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).

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 did not succeed 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

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the church financial resources were not adequate to pursue it. Like many other churches around the country, First Unitarian experienced significant decline in membership. The resulting drop in pledge income led in 2016 to the termination of the contract of Assistant Minister Robin Zucker. 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 section 3.A. 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. In order 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 participates in the strategic planning process as described in Section 3.

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. We anticipate that an interim minister will be hired by August of this year (2019). In the meantime, church members are energetically and ably leading Sunday services. Rev. John Ballance has been contracted part-time to support our pastoral care and new member efforts until the arrival of an interim minister.

To assist specifically with the roles of discernment and planning, the Board in 2018 established the Vision, Identity and Mission (VIM) Committee as a standing committee. As described in sections 3.B and 3.C, the VIM Committee works with the HCC to organize congregants to meet twice a year in small groups and discuss questions whose answers inform our understanding of the identity and vision of our membership. Each year, VIM works with the Board to produce a three-year rolling strategic plan. This document is the second such plan.

An essential part of governance is an objective assessment of how well the church is achieving the goals outlined in each year's strategic plan. Accordingly, in 2018 the Board of Trustees established the Assessment Committee as a standing committee of the Board. As described in Section 3.C, the assessment process provides both feedback on outcomes of the current year and guidance on planning for the next year. The Assessment Committee will be developing evaluation metrics this year that will be applied to produce its first assessment document during the 2019-2020 church year.

3. Strategic Planning Process

This section describes the process that will be used each year to produce an updated Three-Year Strategic Plan. Subsection 3A describes our new governance framework, a framework which provides the foundation of the strategic planning process. Subsection 3B describes the process we are using to discern the identity, vision, and mission of our members. Subsection 3C describes the annual discernment and planning cycle including participants, timeline, and major documents produced.

3.A Our church governance framework is the foundation of planning

First Church has adopted a new governance framework over the past three years. The new 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 VanBecelaere 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 3.1.

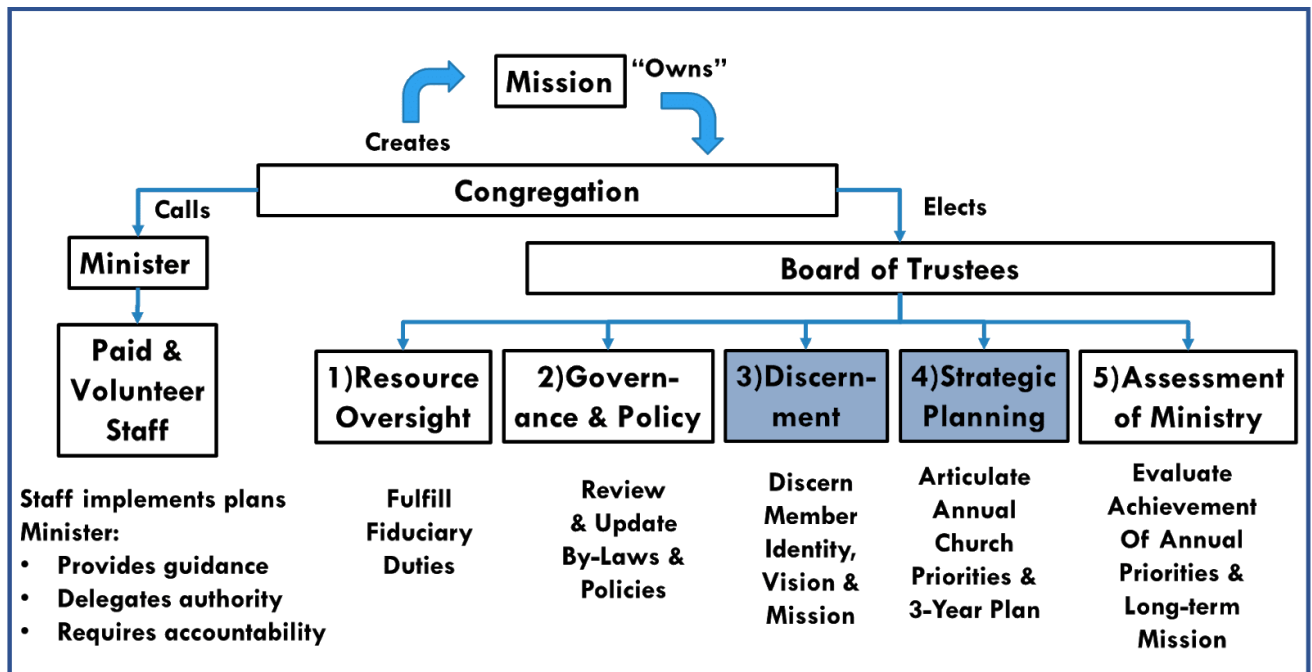


Figure 3.1 Governance framework of First Unitarian Church of Pittsburgh.

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 subsection 3B, the 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 – for now, let’s say it is the **purpose** of the church, why it exists. Our current mission statement was initially created in 2012, prior to the recent changes in governance. It was based on the connect/inspire/serve theme and was recently expanded to include “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 two key governance functions:

- It calls a Minister.
- It elects a Board of Trustees each year.

Within our new governance the Board performs five major functions. They correspond to the five numbered boxes in Figure 3.1. 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 new Strategic Plan. This Board function is facilitated by the VIM Committee with assistance from the HCC.
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. The first such plan is targeted for completion by June of the current year (2018) in time to guide the 2018-2019 church year.
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 of how the church in its entirety is achieving its annual priorities as well as its longer-term Mission.

3.B Discernment is a key part of church governance

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

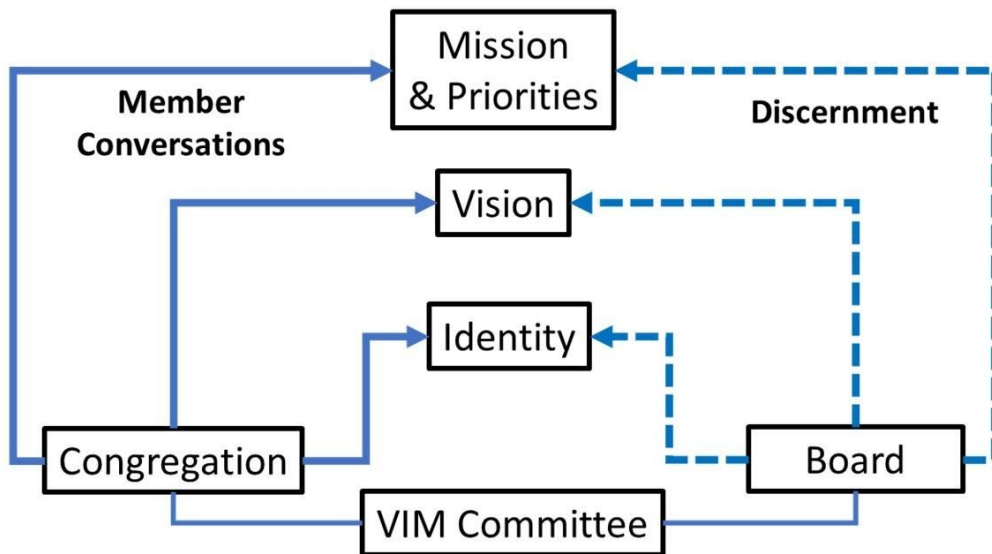
Discernment is the process of coming to a better understanding of the essential characteristics of the congregation -- of its identity, vision and mission. Those three characteristics are defined and discussed in greater detail in Section 4. Briefly, they can be summarized as:

- **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.



Responds to Open Questions

Conducts Conversations

Poses Open Questions

Figure 3.2. The discernment process is a collaborative effort of the Congregation and the Board, facilitated by the VIM Committee.

The church’s mission can evolve slowly over time. The mission framework we currently use – Connect-Inspire-Serve – emerged in 2012 through a process that predates our current governance. It has more recently been extended to include a Learn component. 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.

Figure 3.2 illustrates how the discernment process works. It begins with the Board of Trustees posing a set of Open Questions. By engaging in this process of open questions, the Board explicitly acknowledges that it does not have the answers. The Board works with the VIM Committee to pose questions that are designed to get at the foundational values and aspirations of our members. The questions will sometimes probe the essence of our identity, our vision, and our mission:

- Who are we now – and what do we want to be?
- What is the world calling us to do?
- Who are our neighbors and partners?

The answers to these sorts of questions also guide the priorities of ministry each year. Those priorities become the core of each year's renewed strategic plan.

In order to establish the discernment process within our church's life, the Board has approved the VIM Committee Charter which is included as Appendix B. 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.

Each year the VIM Committee works with the Board to establish Open Questions. It then conducts two sets of Open Question conversations involving as many members of the congregation as want to participate. The VIM Committee compiles the responses received from the conversation and summarizes them for the Board to review. Based on the compiled responses, a short list of priorities is determined for the coming year. The existing statements of identity, vision and mission may also be revisited as appropriate.

3.C 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 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 in Figure 3.3 and described in the following text.

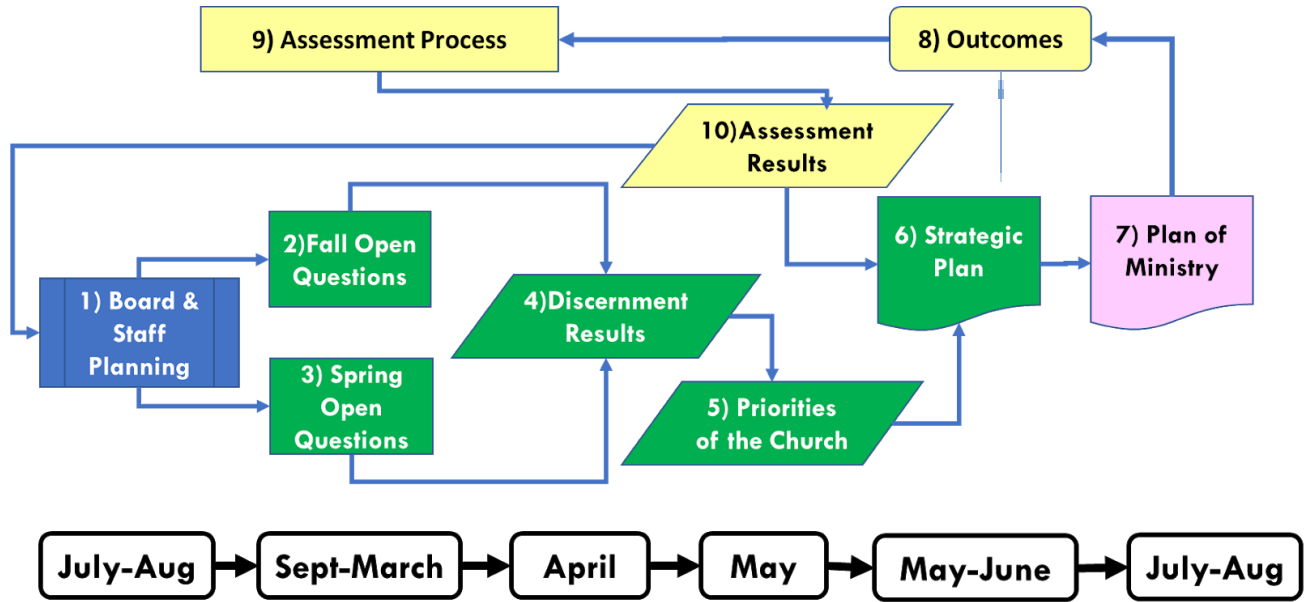


Figure 3.3 Steps in the annual cycle of discernment and strategic planning

The green boxes in Figure 3.3 represent activities and products of the VIM Committee. Following the Board Retreat and other planning activities of the Board and Staff (1) during the Summer, the VIM Committee conducts two sets of congregational conversations during the church year (2, 3). The topics of these conversations 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 outcomes of the previous church year as determined by a structured assessment process whose major components are represented by the yellow boxes in the figure (8, 9, 10).

The VIM Committee compiles, summarizes and analyzes the responses to the Open Question conversations. By April it produces a Discernment Results document (4) that captures key congregational inputs and updates elements of the church’s identity, vision and mission as needed. It then produces a draft Priorities of the Church document (5) that identifies congregational priorities that will best advance the mission and move toward the shared vision. That document is submitted to the Board for review and modification. The approved document is presented to the congregation for review and feedback at the Annual Meeting in late May.

Incorporating feedback from the congregation, as well as the Board and Staff, the VIM Committee prepares a draft of the 3-Year Strategic Plan (6). The plan also incorporates assessment results from the previous year. The draft is submitted to the Board in June for final approval in July. The Staff then prepares a Plan of Ministry document (7) 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.

4. 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 constantly revisited both as to whether it accurately states our intentions and also as to whether we are accurately living up to its standards. Thus, we have proposed the following incarnation of the living mission of First Unitarian Church, which 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*

5. Three Year Strategic Priority Plan

The new governance framework for First Unitarian involves a new 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. Referring back to Figure 3.3, the VIM committee is tasked with encompassing the ideas generated through **Open Questions** (Figure 3.3 steps 2 and 3) into the production of an annual list of short-term annual **Priorities for the Church** (Figure 3.3 step 5). 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 of the annual **Plan of Ministry** (Figure 3.3 step 7) written by the staff (see Section 6) and anchor a **Three Year Rolling Strategic Plan** (Figure 3.3 step 6). Therefore, the Board, the staff, and the congregation are all engaged in both short- and long-term thinking every year.

5.A Annual Priorities of the Church 2019-2020

Following the above process, it has been ascertained that the **Priorities of the Church** for the 2019-2020 church year should continue from the prior year. The actionable items reflect high levels of support from congregation, Board, and ministerial staff and are elaborated and extended by the staff in the implementation **Plan of Ministry** in Section 6. The intentionality statement is reflective of the current state of leadership flux and the strong desire to create, promote, and maintain a welcoming, appreciative, and generous church culture.

- **Create a strong sense of BELONGING for ALL who enter our doors**
 - **Promote greater congregational community and congregation/Board transparency** by establishing First Unitarian culture of participation in VIM/HCC Open Question congregational conversations
 - **Care for each other** by supporting existing and by convening new small group ministries, particularly welcoming newcomers and parents/families to join
- **Explore paths to the formation of a long-lasting and meaningful FIRST UNITARIAN / COMMUNITY PARTNERSHIP**
 - **Discern possibilities for building deeper personal and institutional external relationships**
 - **Raise our collective social awareness of white privilege/culture and classism** through Common Read offerings, Open Questions, and varied voices in the pulpit

In focusing on these priorities, we will intentionally:

- Examine our own church culture and practices through the lens of decentering whiteness, in concert with efforts of the UUA and UU congregations community- and nation-wide
- Assure frequent, open, and respectful communication between congregants, Teams and Committees, the Board, the Staff, and the Minister
- Encourage an energetic spirit of generosity toward and appreciation of the church and each other

5.B Three Year Plan

The three year plan acknowledges this year’s continued Priorities of **creating a culture of belonging within our church** and of **connecting with communities outside our walls**. To engage the Congregation in these Priorities, Open Questions for 2019-2020 will address how we can best support an intergenerational community and what actions First U might take to effectively impact social justice issues based on the self-examination Questions that have been discussed in 2018-2019. A summary of the results of the 2018-2019 Open Questions is presented in Appendix A.

Clearly, the next few years will be marked by staff transitions. Staff positions indicated on the summary chart below reflect the desires of the congregation for

- a thoughtful process for calling our next Minister
- meaningful, participatory music to support our worship services
- an intergenerational congregation that is welcoming to students and young adults on nearby college campuses
- clarity and efficiency of internal and external church communications

The chart below highlights specific activities in support of belonging and connecting with external communities that were raised by a number of congregational participants in past years’ Open Questions. 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 Unitarian Church.

First Unitarian Church is at an anticipatory 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.

2019-2020	2020-2021	2021-2022
Open Questions conversations (VIM/HCC)	Open Questions conversations (VIM/HCC)	Open Questions conversations (VIM/HCC)

<ul style="list-style-type: none"> ● Fall: Building intergenerational relationships ● Spring: How can First U members best impact local/national social justice issues? 	<ul style="list-style-type: none"> ● Fall: new minister ● Spring: 	<ul style="list-style-type: none"> ● Fall: ● Spring:
<p>Hire Interim Minister (Board)</p> <p>Review of Staffing Structure and Needs (Board)</p>	<p>Initiate Search for Called Minister</p> <p>Hire Young Adult and Campus Ministry Coordinator (LRED)</p>	<p>Call Settled Minister</p>
<p>Create a strong sense of BELONGING for ALL who enter our doors</p> <ul style="list-style-type: none"> ● Encourage and develop small group ministries ● Continue to clarify congregational communications protocols so all members and friends are in the loop (calendar, website, social media, email, order of service) ● Continue to raise awareness of the impact of diversity of identities on inclusivity at First U through book study, discussion (LRED), Open Questions (VIM/HCC), and varied voices in the pulpit ● Upgrade exterior signage to communicate First U identity to the community (BGC) ● Improve accessibility (BGC) 	<ul style="list-style-type: none"> ● Establish a signature First U activity/program such as a lecture/film/book series or coffee shop 	<ul style="list-style-type: none"> ●
<p>Explore paths to the formation of a long-lasting and meaningful FIRST Unitarian / COMMUNITY PARTNERSHIP</p> <ul style="list-style-type: none"> ● Continue community music collaboration (IC) ● Evaluate effectiveness and desirability of annual Day of Service (SC) ● Connect with social justice efforts of UUPLAN and UUs of Greater Pittsburgh (SC) 	<ul style="list-style-type: none"> ● Build deeper personal and institutional relationships with chosen local community leaders to identify best fit partnerships (CC, IC, SC, LC) 	<ul style="list-style-type: none"> ● Establish a meaningful and lasting First U / community partnership

<ul style="list-style-type: none">• Focus on reaching out as a church to our local community		
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- VIM - Vision, Identity, Mission Committee
- HCC - Healthy Congregations Collaborative
- Cov- Covenant Group Team
- MCC - Marketing and Communications Committee
- PCT - Pastoral Care Team
- CT - Connections Team
- BGC - Building and Grounds Committee
- AFD - Adult Faith Development Team
- CYRE - Children and Youth Religious Education Team
- CC, IC, SC, LC - Connect/Inspire/Serve/Learn Councils

6. Staff implementation of strategic priorities

See separate Plan of Ministry 2019-2020 document.

7. Plans for assessment

Assessment is a required feedback mechanism to judge how well are actions match our declared priorities and how well we are carrying out our declared plans. To carry out this assessment, the Board has chartered an independent committee of lay members to form an Assessment Committee. The committee will be purposefully composed of members engaged in all four mission domains: Connect, Inspire, Serve, and Learn. 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. The Assessment Committee Charter is included in Appendix C.

Appendices

Appendix A. Summary of 2018-2019 Open Questions Results

A.1 Fall 2018 Open Questions for Congregational Conversations

Question #1: How do you self-identify?

Personal? Gender? Race? Belief System/Religion? Class? Culture/Background? Sexual Orientation?
Ability? Age? Education? Other?

Share 2-3 of these qualities/traits, perhaps 1 trait of which you are most proud, 1 with which you struggle, and 1 that you would like others to know.

Question #2: Do you have people who self-identify differently from you within your circle of friends?

Within your neighborhood? Within your workplace network? Do you feel that your friendships/acquaintances are diverse? **If not, what are the barriers to diversity for you?**

Question #3: Consider welcoming and unwelcoming aspects of First U worship services and church culture. **What feels welcoming to you that makes you feel like you belong here at First U? What feels unwelcoming to you? What do you think may make others who self-identify differently from you feel welcome or unwelcome?**

Question #4: **What would you like to see in our worship services or church culture that would give you a greater sense of belonging? What are you willing to do or support for others who identify differently from you to give them a greater sense of belonging?**

Summary of results (sorted data available upon request)

First U needs to be more intentional about welcoming newcomers.

- Very often newcomers only felt welcomed by Rev. Herndon
- First U has been more intentional in the past with a paid staff position and key lay leaders
- Undercroft experience is not welcoming to newcomers
- Encouragement to invite newcomers to lunch/home and provide congregant mentors, but to avoid “Besieged by Welcome Committee” approach

First U needs more genuine, congregant level social/racial justice activity.

First U members seek deeper connection.

- The feeling of cliques are a problem – even Covenant Groups become silos
- Undercroft experience seems to promulgate the feeling of cliques
- Encouragement to initiate pot lucks, coffee house, after-sermon discussion group, book clubs
- More emphasis on Joys & Concerns – more personal connection

First U is diverse.

- Don't make the assumption "we" are all the same
- Acknowledge and affirm a faith spectrum within the church
- Sadness about cultural/political divide, often within families – how can we span the divide?

Participation

- Enthusiastic about more voices in the pulpit
- Need for more volunteering to help with activities, especially food/social events

Music program widely praised

- Can provide a bridge to more diversity

A.2 Spring 2019 Open Questions for Congregational Conversations (data still being collected)

The questions we are about to discuss were formulated to address the two First Unitarian Church Priorities for this year:

- 1) **Create a strong sense of BELONGING for ALL who enter our doors**
- 2) **Explore paths to the formation of a long-lasting and meaningful FIRST UNITARIAN / COMMUNITY PARTNERSHIP**

Question #1: What understanding do you have of what it takes to be an effective partner with someone whose voice is not represented? If you feel your voice is not represented, what qualities would you want in a partner?

Question #2: What knowledge/experiences do you personally, and do we as a church community, need to gain to be prepared to be effective partners?

Questions #3: Partnerships build relationships. Partners support and learn from each other. Thinking first of the local community level, some examples of our current church partnerships include Kris Rust connecting First U with the with Lemington Gospel Chorale and Marty Lieb connecting First U Habitat for Humanity in Homewood. **What local social justice organizations are you already associated with?**

Question #4: On a larger scale, Unitarian Universalist Pennsylvania Legislative Advocacy Network (UUPLAN) is focused on the following issues: gun safety, immigration, gerrymandering/Fair Districts PA, free and fair elections, domestic abuse, anti-mass incarceration, economic justice, environmental justice, and reproductive justice. The Unitarian Universalist Association is focused on: economic justice, climate and environmental justice, racial justice, immigrant justice, LGBTQ justice, reproductive justice, and voting rights. **What justice issues drive you and why? What would you like to see as a First U congregational study item that could help guide us to further action?**

Appendix B. VIM (Vision/Identity/Mission) Committee Charter

Purpose

The VIM Committee was convened by the First Unitarian Church Board of Trustees in 2017 to take the lead on two major Board functions:

- Discernment of First Unitarian Church Identity, Mission, and Vision
- Strategic Planning

Authority

All recommendations and documents produced by the VIM Committee are subject to direct approval by the Board.

Duration

The VIM Committee is a standing committee designed to perpetuate the mission and vision of First Unitarian Church.

Convener/Chair Person

Two Board members will be selected internally from among the Board to convene and chair the VIM Committee.

Roles and Responsibilities

In addition to the two Board members, the VIM Committee will be comprised of four additional members of the Congregation, invited by the current VIM Committee in collaboration with the Board. Non-Board members will serve a three year term.

As a group, the VIM Committee, with input and final approval from the Board and Ministerial Staff, will produce the following products:

- Open Questions (see *Governance and Ministry*, D. Hotchkiss) shared with the Congregation that discern our identity as a church, the responses from which feed into our living vision and mission.

Strategic Plan 2019-2022 First Unitarian Church of Pittsburgh

- The topic of the Open Questions is established by the Board.
- The VIM Committee, together with appropriate Congregation members and/or staff external to the Committee, will then delineate the exact questions to be posed to the Congregation.
- VIM Committee members, together with HCC members, will facilitate small group conversations with the Congregation to address these Open Questions twice per year.
- Annual Priorities of Ministry, a short list of actionable items reflecting our mission to be fleshed out and implemented through an Annual Plan of Ministry by the Minister and Staff.
- Detailed 3 Year Rolling Strategic Plan designed to make our vision a reality.

Accountability

The VIM Committee is accountable to the Board.

No committee is accountable to the VIM Committee.

Communication

- A summary of Open Question responses to be presented to the Board.
- Annual Priorities of Ministry reflecting Congregational input to be presented to and approved by the Board, then publicized to the Congregation through as many channels as possible (Chalice, Board email, pulpit).
- 3 Year Rolling Strategic Plan to be presented to and approved by the Board, then publicized through as many channels as possible (Chalice, Board email, pulpit).

Appendix C. Assessment Committee Charter

Purpose

The Assessment Committee was convened by the First Unitarian Church Board of Trustees in 2018 to take the lead on the 5th major Board function of Assessment. Each year, as described in the First Unitarian Governance Manual, the Board receives feedback from the Congregation through intentional Open Questions conversations and, together with the Ministerial Staff, establishes the Priorities of the Church for the year. The Board and Ministerial Staff then update a Three Year Rolling Strategic Plan and an annual Plan of Ministry. The purpose of the Assessment Committee is to assess the progress made by the Board, Staff, and Congregation in implementing these plans each year.

Authority

The Assessment Committee acts under its own authority. All recommendations from the Assessment Committee are presented directly to the Board.

Duration

The Assessment Committee is a standing committee designed to perpetuate the mission and vision of First Unitarian Church.

Convener/Chair Person

One member of the Assessment Committee will be selected internally to serve as Chair.

Roles and Responsibilities

The Assessment Committee will be comprised of 6-8 members, with at least one member representing each of the four mission domains, respectively: Connect, Inspire, Serve, and Learn. Members will serve at most three year terms, stepping down in staggered fashion to retain institutional knowledge.

The Assessment Committee will act on the following timeframe:

- September: Receive copies of the Priorities of the Church, Three Year Rolling Strategic Plan, and Plan of Ministry
- September-November: Establish evaluation metrics to assess the implementation of the above Priorities and Plans
- April-May: Apply the established evaluation metrics to the activities of the past year
- June: Present a written summary of assessment findings and recommendations to the Board

Accountability

The Assessment Committee is accountable to the Board. No committee is accountable to the Assessment Committee.

Communication

The Assessment Committee will communicate with the Board via an assigned Board liaison.

Appendix D. Members of VIM Committee 2018-2019, HCC 2018-2019, Assessment 2019-2020

VIM Committee 2018-2019

Joan Harvey (2020)

Bob Mitchell (2020)

Chas Murray (2019)

Cathy Rohrer (Board Liaison)

Michael Safran (2022)

Jean Schmidt (2021)

HCC 2017-2018

Linda Kauffman (2019)

Jim Reitz (2018)

Ebe Emmons (2019)

Joe Jencik (2020)

Assessment Committee 2019-2020

Lee Carnes

Phyllis Genzsler

Alice Lieb

Mary Weidner