

# **Rolling Strategic Plan 2023-2026**

## **First Unitarian Church of Pittsburgh**

### **July 2023**



## Annual Priorities 2023-2024

- 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

### Supporting Activities

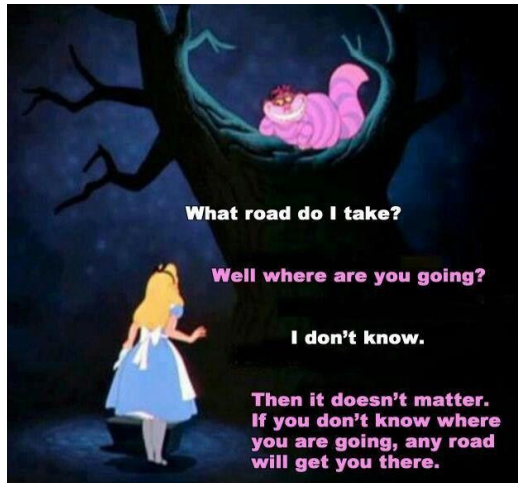
- Improve communication, organization and coordination within the church
- Organize more church events, both internal and external. Internal events foster a sense of being in community. Outward-facing events attract like-minded people who might become partners or members.

#### *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 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 identified annual church priorities that have arisen from the congregational conversations and have been vetted by the Board and Ministerial Staff
- Section 4 summarizes the role of the church staff in implementing the strategic plan
- Section 5 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 is as follows. 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. 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 short-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.

#### **Section 3A. Annual Priorities of the Church 2023-2024**

Following the above process, it has been ascertained that the **Priorities of the Church** for the 2023-2024 church year should evolve from the 2019-2022 plan. 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 as described** in Section 4. The discerned priorities for the coming church year are:

- 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** will both increase our ability to achieve our priorities, and are important objectives in and of themselves.

- 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.

### **Section 3B. Three Year Plan**

The three year plan acknowledges this year's Priorities of **diversifying and growing our membership** and of **creating lasting and meaningful First Unitarian / community partnerships advancing racial justice and environmental justice**. To engage the Congregation in these Priorities, discernment activities in 2023-2024 will address how we can best grow and support a diverse, multicultural, intergenerational community and what actions First U might take to effectively impact social justice issues based on the 2022 Environmental Justice cottage meetings and the 2023 survey responses.

Over the past year, the groundwork was laid to support progress on these Priorities. At the 2022 Annual Meeting the congregation unanimously approved a churchwide Environmental Justice 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." While this commitment was fulfilled, the inclusion of environmental justice in this Strategic Plan presents an opportunity to continue work in the same direction. Also, our Racial Justice Task Force advocated for

adoption of the 8<sup>th</sup> 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.”

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. The chart includes specific goals for each priority over three years with most detail in the first year. In order to provide background and context for those goals, subsections 3B.1, 3B.2 and 3B.3 provide specific examples of steps we can take to advance both the two priorities and the supporting activities.

#### Subsection 3B.1 Diversify and Grow Membership

In the areas of diversifying and growing our membership, a series of efforts from late 2022 to early 2023, involving informal consultations of church members and leaders, and planning by the Minister and Trustees, has identified more than two dozen potential activities that could strengthen our “pillars of membership”. These pillars represent all 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 potential actions include:

- Working with partner UU churches in the Pittsburgh region on joint promotion
- Making 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 re-invigorated Membership Committee has helped to create a positive membership process for visitors.

We will need to both act on, and build on, our initial ideas if we are to both diversify and grow our membership. When thinking about diversity in particular, we must also be sensitive to 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.

### Subsection 3B.2 Create Partnerships Advancing Racial Justice and Environmental Justice

Work toward the partnership goal began during the 2022-2023 church year primarily through the Environmental Justice Initiative. Responses to the Environmental Justice Open Questions in 2022 cottage meetings revealed air quality as the highest priority. Accordingly, several members began developing a relationship with Valley Clean Air Now (VCAN). As stated in its website ([valleycleanair.com](http://valleycleanair.com)) “Valley Clean Air Now seeks to fight for the residents of the Mon Valley who continue to suffer from severe health, economic, climate, and environmental injustice by galvanizing the community to take action through local politics, grassroots organizing, community building, education, and community health initiatives.”

In addition to VCAN, there are many existing community organizations that are potential partners. The following list is meant only to provide a representative sample

- Black Urban Gardeners and Farmers of Pittsburgh Co-op (BUGSFCP)
- Garfield Community Farm
- Kincaid Street Community Garden
- Upstream Pittsburgh
- Grounded Strategies
- CeaseFirePA

A key component of social justice action and partnership is public advocacy. Specific advocacy actions can take many forms such as:

- Letters to the editor
- Letters to decision makers
- Op-eds
- Lobby meetings with decision makers
- Demonstrations, parades, vigils
- Church informational events open to the public such as the Forum

### Subsection 3B.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.



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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.

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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.

| 2023-2024   | 2024-2025   | 2025-2026                                  |
|---|---|--|
| <p><b>Open Questions conversations</b></p>  | <p><b>Open Questions conversations</b></p>  | <p><b>Open Questions conversations</b></p> |
| <p><b>Diversify And Grow Our Membership</b></p> <ul style="list-style-type: none"> <li>● Identify specific efforts that can increase the diversity of members, especially within the 4 priority categories</li> <li>● Identify barriers to improving diversity, which must be overcome before wider outreach can begin</li> <li>● Develop clear actions, and identify the people/groups responsible for each, to</li> </ul> | <ul style="list-style-type: none"> <li>● Review performance of targets and metrics and adjust specific actions to amplify what seems to be working and replace what doesn't seem to work</li> <li>● Examine changes in the external environment (community changes, political/social changes, changes within the UU)</li> </ul> |  |

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|   |   |  |
|---|---|--|
| <p>support people through each stage of the membership journey</p> <ul style="list-style-type: none"> <li>● Identify, as appropriate, specific targets/metrics for how we will measure success toward this goal</li> </ul>  | <p>community at large) and adjust actions to align with these opportunities and threats</p>   |  |
| <p><u>Create Long-Lasting And Meaningful First Unitarian / Community Partnerships Advancing Racial Justice and Environmental Justice</u></p> <ul style="list-style-type: none"> <li>● Continue community music collaborations to grow Beloved Community</li> <li>● Boost skills in multicultural competence within First U community</li> <li>● Document and publicize the church’s carbon footprint reduction due to our             <ul style="list-style-type: none"> <li>○ Geothermal heat pump HVAC system</li> <li>○ LED lighting upgrade</li> <li>○ Solar panel installation</li> </ul> </li> <li>● Continue and expand current relationship with Valley Clean Air Now (VCAN)</li> <li>● Identify 2 additional community organizations with which to engage a substantial proportion of our church community in direct action for racial/environmental justice. This could include expanding our participation with PIIN projects</li> <li>● Expand public advocacy in support of racial and environmental justice. This could include expanding our participation with UUJustice PA projects</li> </ul> | <p>Deepen relationships with potential/emerging partners. Become a trusted resource for action and advocacy</p> <p>Organize 2-3 public-facing EJ/RJ events at church</p> <p>Cultivate relationships with area publications such as Post-Gazette, Tribune Review and Pittsburgh City Newspaper</p> | <ul style="list-style-type: none"> <li>● If appropriate and welcome, participate in leadership of community justice organization(s)</li> </ul> <p>Establish ongoing EJ/RJ discussion/lecture series</p> <p>Become regular letter and Op-ed contributors to area publications</p> |

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 4. Staff implementation of strategic priorities**

See separate Plan of Ministry 2023-2024 document.

#### **Section 5. 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) priority 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. These efforts will not directly assess the goals of the Strategic Plan, however. Additional mechanisms are needed to accomplish this. 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 20<sup>th</sup> 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, 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 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 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 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. 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 participated in the strategic planning process as described in Section B3.

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.

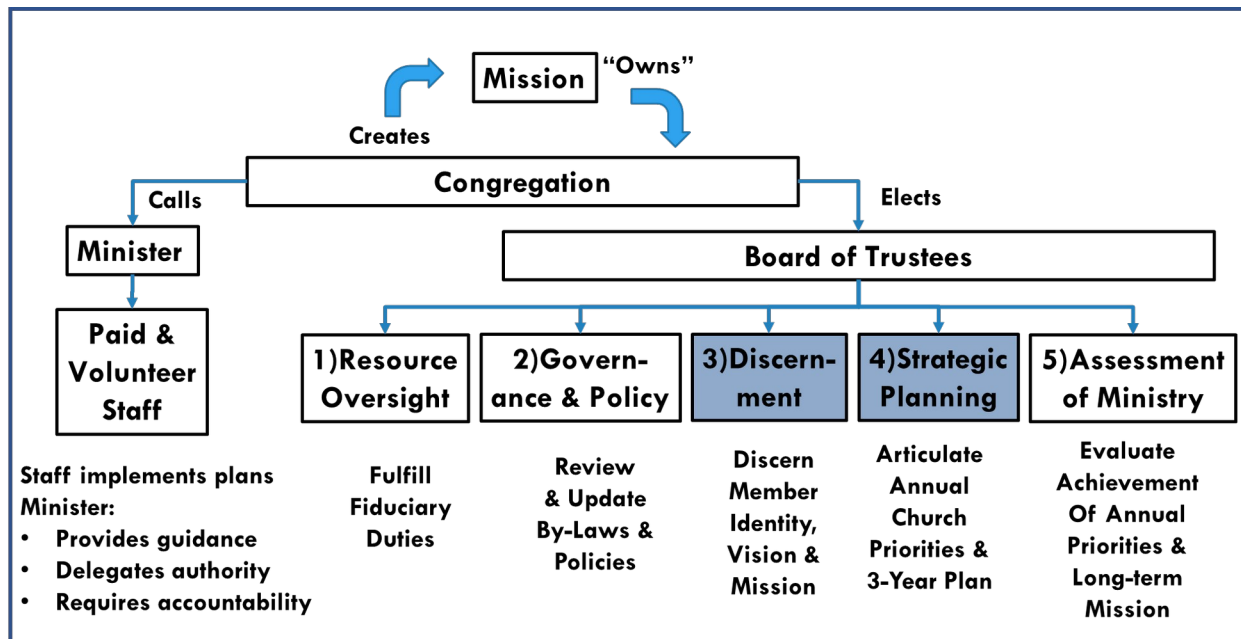
In 2021, following a robust search, Members called Rev. Dr. Kate Walker as our first female called Minister.

## Appendix B. Strategic Planning Process

This section describes the process that will be 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 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 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 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 – 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 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 new 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 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**

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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.

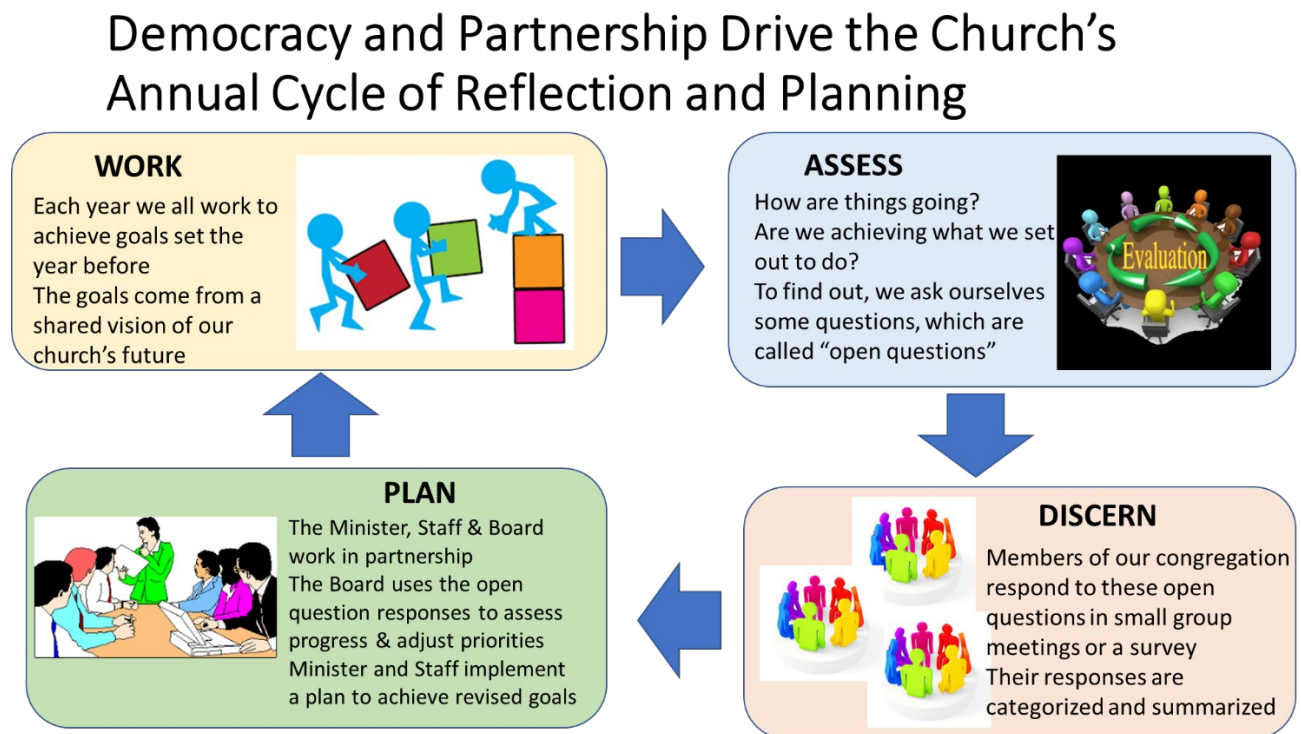
The church's mission can evolve slowly over time. The mission framework we currently use – Connect-Inspire-Serve – emerged in 2012 through a process that predates our current governance. It has more recently been extended to include a Learn component. In general, an expression of Mission may persist 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.

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 Implementation Plan 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 at a high level in Figure B2 and described in the following text.



**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 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. 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 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.