

**Final Closing Assessment, RRUUC Strategic Plan 2006-2011**  
**March 22, 2011**

**Executive Summary**

RRUUC does many things well – Sunday services and CC&C, music, social justice, pastoral care, community connections. The 2006-2011 Strategic Plan was begun at time when renovated and expanded space was becoming tangible, when we had two strong ministers and other good staff, and before the serious downturn in the economy that began in early 2008. It developed a set of goals and objectives that suggested RRUUC could be even better than it was – reaching out more visibly to the wider community, pulling in more and younger members, strengthening the fun and caring experience, and enhancing the spiritual growth that is the foundation of UU and RRUUC principles, while prudently attending to staff and building. The “appreciative inquiry” method used in developing the plan elicited many creative ideas for new achievements in these four areas. The following review of progress for years 2006-2010 indicates which objectives were attained and which fell short, with some observations about possible factors. Summarized achievements and challenges are below.

Most results were achieved during the first three years; these have been sustained during the final two years of the plan period but further progress was limited, probably because of ministerial transition requiring Board attention and the recession. The committee recommends we declare the 2006-2011 plan to be over, as a guide for action, and that we await completion of the ministerial search process before embarking on a new plan. The strategic planning review committee would like to support that search process by sharing these findings in more detail. We also recommend that this closing assessment be shared with the congregation by making it available online for members and by providing a summary version of it to be discussed in several focus groups scheduled during January-March 2011.

**Achievements:**

Physical Expansion: The new fellowship hall, kitchen and classrooms as well as renovations to the original building were completed and put into service in fall 2008, adding to the attractiveness and opportunities for RRUUC provided by our space. Rentals have increased as well. Accessibility has improved (rest rooms on main floor). A professional analysis of building maintenance requirements and their costs was completed, ready to be incorporated into future plans.

Identity: As a result of a year-long consultative deliberation, River Road Unitarian Church changed its name in 2008 to River Road Unitarian Universalist Congregation. This move was supported by a large majority of the congregation. A gala celebration of RRUC’s 50<sup>th</sup> anniversary took place. An annual Action Week was initiated to offer to the full congregation opportunities for intergenerational involvement in the wider community. An invigorated Public Relations committee is informing local media about our events, as is our re-designed website. RRUUC has hosted topical community forums on health care and immigration with other groups, and participated in inter-faith social justice dialogues and concerts. Activities have intentionally become more intergenerational, facilitated by the new space.

Staffing: Staffing has generally been maintained since 2006, though the Associate Minister position, key to implementing church-wide programs, was eliminated in 2005, with Rev. Ginger Luke absorbing some of the tasks in addition to her Religious Education portfolio, when she became Associate Minister for Congregational Life. Administrative staff time has slightly increased and in some cases, been reconfigured (e.g. RE, after departure of the DRE during the plan period), at levels reasonable for RRUUC’s current needs and budget. Compensation and retirement benefits have been given priority in line with cost-of-living trends. Staff transitions have been smooth. Use of technology has modernized and improved internal communications for many (e-weekly, all-announce, website), so that information can be more timely, detailed and helpful to programs.

Congregational Life and Governance: Board membership has been continually replenished in an orderly way and has made substantial progress on governance issues, reaching out to the denomination to

understand what works well. Leadership training was occasionally offered. Small groups thrive in many forms – as covenant groups or men’s/women’s groups, and also task-oriented ones: social justice, grounds care, book groups, meal sharing, quilters, and a vibrant youth group. Numerous enjoyable social activities involve the whole community – annual fall retreat, fundraisers for social justice partners, holiday parties, music events and family film evenings.

Outreach and Communications The RRUUC website has been improved and made a more user-friendly platform; much information is now conveyed through that, both for members and for the general public. Many activities are managed through the website (e.g. signing up for events and volunteer tasks). The creation of the public communications committee is an important advance for considering the content of shared information.

## **Challenges**

Membership: In spite of strong staff and lay committee leadership, membership growth did not occur as hoped, nor were young adult programs, so initially hopeful, sustained throughout the period. RE attendance has also declined since a 2002 peak by about 28%. RRUUC’s broad lay leadership – which must emerge and be renewed from the – somewhat declining -- membership – has not always been able to keep up with the many current needs, nor been able to take up all the new ideas in the strategic plan. Burnout hits even the very best of our leaders. The membership goal of 800—set when membership was about 700 -- was never reached, and in retrospect, is viewed as a “stretch” goal which may have been calculated as the number required to sustain RRUUC financially after taking on the mortgage for the capital improvements, should average operating pledge amounts stay about the same.

Staff performance: Despite the Board’s efforts to keep strategic planning goals in the foreground, staff buy-in to meet the goals appears to have been mixed. Given staff time and energy working in a disrupted environment during construction, the plateau in staff efforts to drive program innovations may have been inevitable. There was a gap in the Board’s efforts to conduct ministerial performance evaluations during 2005-2009, in part owing to resistance from the senior minister. This made holding senior staff accountable for their part of the strategic goals (as performance benchmarks) hard to implement. Ultimately, the long-time senior minister decided to seek a position at a new congregation in the fourth year of the strategic plan, creating a break in top leadership just as the congregation was getting back into the swing of governance after the long focus on the building.

Programs: Activities (like Action Week) intended to coalesce the entire congregation have sometimes turned out simply to offer more, though valuable, small group activities. Some new ideas have been tried by ministers or staff (more covenant groups, evening services, adult enrichment classes, social justice speakers) but demand for these was not robust. The original hope of a dedicated sacred space in the new building fell prey to constrained budgets and a need to be flexible with all spaces to accommodate ongoing programs and expanded money-earning rentals. Planning for a memorial wall and new street signage each made progress but ran into financial and conceptual issues.

Finances: Pledging for the operating budget is down recently, not unexpected in a moment of financial crisis and ministerial transition, but expenses remain on the upswing with the larger facility and mortgage requirements. Some relief is occurring with greater rental income since 2009-10. For much of the plan period, however, RRUUC did not pay its full “fair share” to district and national UU entities, sending 50% of the assessed amounts.

## **Conclusions**

A lot is right at RRUUC, but expectations are also high and varied. Potential exists – and groundwork is laid – for advances in the next strategic period on governance, congregation-wide activities, green building use, spirituality, community outreach (especially using technology), recuperated finances, and fun activities. Key areas of commonality among the spectrum of interests within RRUUC need to be identified. The timing of further strategic work to do this – and involvement of the membership -- will need to adapt to the ministerial transition – taking full advantage, during the two-year interim

ministry, of a leader skilled in discernment practices, but awaiting the settling of a new senior minister before starting a fresh planning process.

### **Background on Origins of this Document**

RRUUC's current five-year strategic plan ends in FY2011. Last year's board determined to charter a permanent Strategic Planning Committee to consider how and when to prepare a new plan, as well as monitor implementation and progress. Board member Harry Radcliffe was asked to organize such team and that team<sup>1</sup>, in collaboration with incoming Board Chair Suzanne Griffin, made several decisions. First, upon learning of the likely change in senior minister and realizing that we would be entering a period of discernment and interim ministry, the team recommended that the planning process calendar be adjusted to assure that any surveys or engagement of the congregation be coordinated and ideally, combined, to assess both strategic views about who we are and want to be, and thoughts about the kind of senior minister we want to seek. Thus, an immediate task the team decided to focus on during May-August 2010 was to assess progress on the goals and objectives spelled out in the current plan, interviewing staff, board and committees assigned responsibility, as well as data available in annual reports and board materials. No survey was conducted, so full assessment of progress is incomplete. This report is the result of the team's efforts. The team (i) shared these findings and discussed process with Interim Minister Maureen Killoran, (ii) envisions helping to organize a broader, representative team that will oversee the actual planning process in the coming months, (iii) shared our findings through information sessions after services at RRUUC and through our website, (iv) offer services toward developing congregation-wide consultation likely to take place in conjunction with a discernment process during the interim ministry, as input to the development of a future strategic plan

### **Current Strategic Plan**

The 2006-2011 plan had four specific goals:

- **“Reach out** to the wider community: By 2011, the voice and values of RRUC<sup>2</sup> are visible in the local community. We are a congregation that communicates well – both internally and externally.
- **Grow** our membership: By 2011, RRUC has a growing membership of 800 members, with a visible presence of young adults.
- **Unite** in the spirit of fun and a culture of caring: By 2011, we can say of RRUC that we have fun together, we are intergenerational, and are a community that demonstrates a culture of caring.
- **Nurture** spiritual growth: By 2011, RRUC has programs in place that intentionally nurture the spiritual health and lifetime connections of families and individuals.

The plan also had objectives related to lay leadership, staffing and building maintenance, along with a goal of financial stability and stewardship:

- By 2011, lay leadership provides an exciting opportunity for its members and an increasing resource for RRUC; that is, we have more volunteers discovering an opportunity to do more of what they love for RRUC.
- By 2011 RRUC will be providing yearly COLAs to the staff, health care benefits in line with UUA guidelines, and funding for staff positions in line with the demands on the office and custodial staff resulting from our new building, new rentals, and new activities.
- By 2011, the renovation of our award-winning building is complete and we have included in the budget provision for recurring major maintenance items.”

### **Progress on Achieving the Goals**

#### **Goal 1: Reach Out to the Wider Community**

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<sup>1</sup> Bennett Harman, Dale Hill, Charlotte Jones-Carroll, Charlotte Moser

<sup>2</sup> When the original plan was prepared, the congregation's name was still RRUC, so this quote from the plan preserves that term

Objectives	Responsibility	Where in 2006?	Tasks	By 2011
Annual All-Church social justice proj.	Board appointed new task force to plan in coord w/ SJC	Many SJ groups and activities	Develop annual all-church project, intergenerational	Undertake 5 <sup>th</sup> project
Community outreach, PR	New Public Rel. committee	Charter for comm written	Develop/implement	Allocating \$3500 to PR/communic_
Expand RRUC website	PR Comm/volunteer	Vol webmaster + 1-2 hrs/wk staff time	Develop/implement	Friendly website
Provocative Programs	Ministers	None that draw many outsiders	Begin to offer	

The plan envisioned a substantial increase in our outreach to the larger community to share and promote our values but also to promote bonding within the congregation by working together (beyond the current work in many small social justice task forces). This would involve not only figuring out what activities all could agree on, but also how to advertise and welcome into our building people from the wider community, who may not always share our viewpoints.

**Annual all-church social action project** Rather than a single annual intergenerational all-church social justice project, a single Action Week has been developed. This now includes many separate activities which are proposed by different members, are broadly promoted and offer smaller groups a variety of one-time social justice experiences with the wider community, not just UU-centric groups. It has been offered every year since first planned and has raised awareness of social action and offered intergenerational activities and opportunities to children. However, the activity does not achieve the envisioned unity of purpose among the overall congregation originally planned. It also requires substantial planning and coordination, ideally backed by a committee, but during the last two years, the Board found it difficult to recruit the necessary leadership. In earlier years, the ministerial interns helped provide back-up support to the committee, but, as this was not available during the last two years, preparation and participation were wearing a bit thin in actions offered and sign-ups. Those proposing activities and participating behind the scenes are not always associated with the Social Justice Council, but the organizing was recently taken on by the SJC, which is already tasked with other valued responsibilities (e.g. Alternative Gift Market, twice yearly Special Outreach allocations). The upcoming strategic planning exercise may be a time to evaluate this initiative and its priority within the congregation's overall needs.

**Community Outreach/Public Relations** A Public Communications Committee was reactivated and is functioning. It developed a list of media outlets, and tried to advertise music events, bazaar and other potentially popular activities. Press releases were prepared and sent to media but no media took up our potential story. A Facebook page for RRUC was developed and launched by a committee member, and is still in evaluation phase (it seems constrained for serious advertising, but does provide info).

**Expand RRUC Website:** Our website has been improved and made more user-friendly. Three or four years ago, the website was changed from an HTML system to a "content management system" to allow a broader set of generalists to update content. A website design committee helped design and user-test the system. Each committee was invited to appoint a website liaison person who would then be trained to keep their own site updated. This set of appointments and training did "occur in a broad way." In total, 50 people were trained, but not many followed through on updates (in the past year, fewer than 10). The heaviest users are the staff – and the website has been used effectively for major announcements. The two "webmasters" (Bob Waser and Jeff Hollingsworth) continue to be backed up by the same web design group which, though dormant, is occasionally called upon for technical discussions. An issue remains about how interactive it can be for members while still offering sufficient information for the general public. There are quite formal guidelines on what can be placed on the website to respect privacy. There are "public" and "members" versions of different products, like the e-weekly and streaming video Sunday services. Many basic documents are now available on the website, and the office is exploring the

possibility of using it for group networking (if Facebook is too difficult to control). A significant related development was the elimination of regular hard copy monthly newsletters (see Goal #3), replaced by e-bulletins, and a continuing Sunday Bulletin insert in order of service for lists of activities.

**Sponsor Programs that Attract People with Diverse Ideas and Viewpoints.** : While this partially encompassed a goal dubbed “provocative programming,” to sponsor events which provided more time and wider perspectives than CC & C, it also envisaged other outreach programs that could attract other denominations or community organizations. Some would count among the accomplishments the following activities, initiated not by the ministers but by others with support of the ministers: a) the sponsoring by RRUUC and continued activities of the Washington Religious Coalition Against Torture, including protests outside the US Vice-President’s House, b) participation with Bradley Hills Presbyterian Church and a Jewish congregation in a benefit concert against AIDS, and c) an experiment in advertising more widely (with singles groups) the “Films that Make You Think” class. The second experiment (Bradley Hills concert) was the brain child of RRUUC’s music director, and preparation was well advanced when the Board was asked to approve its fundraising aspects, which unfortunately would have conflicted with other fundraising efforts already underway, hence limits were applied to the concert in this aspect. The third experiment attracted some new people to RRUUC, but advertising was not maintained. As far as proactively sponsoring thought-provoking speaking events for discussion, -- making RRUUC a “great salon” – but neither minister really took action on this, though it was their responsibility. While CC&C traditionally offers a good venue for outside guest speakers, the current strategic plan sought to go farther, to step outside of the RRUUC comfort zones and include speakers whose views were quite different, with more publicity surrounding the efforts. Rev. Luke had tried one class on trans-gender issues advertised only internally. A recent immigration reform panel at RRUUC (co-sponsored by Quaker group and Protestant churches) did touch on a provocative issue and attracted a variety of views, including some in the audience quite hostile to any concept of immigrant support. Most of the presence at social justice demonstrations has been at individual parishioners’ initiative or SJ task force’s coordination, and has included at times a ministerial presence. For next year, RE staff have decided to focus on the theme of “hunger” with good nutrition as a related issue. They will attempt coordinated programming on this global problem. An obvious link would be to seek out the environmental and human rights groups within the social justice network at RRUUC to work with RE staff and ministers on this theme.

**Observations:** The ideas were good, and touched a chord within our justice-minded congregation, but the implementation has not fully lived up to expectations. The evaluations from Action Week participants have been positive but it remains difficult to attract committed organizers. The website and e-newsletter have made things easier for staff, perhaps facilitated promotion of events by committees and task forces, allowed for more information on denomination-wide events, freed up volunteer resources to support membership work, and facilitated communications to members, all of which is positive. However, there is not much evidence that these and the public relations efforts have created much buzz beyond RRUUC or brought in more visitors. Sponsoring broader, new-style outreach programming has been spotty, although the potential remains if staff were to back them. For other activities, limited volunteer leadership may be constraining potential.

**Goal #2: Membership Growth with Visible Young Adult Presence**

Objectives	Responsibility	Where in 2006?	Tasks	By 2011
Office help on membership	Board/volunteers	Occasional help	Find volunteers	Regular volunteers
Increase membership	Membership Committee	665 members	Add 27 net new members/year	800 members
Young adult programming	Worship, RE, music, all	Young adult intern	Expand YA programming	Greater % of young adults
Experiment with new programming	Ministers, staff, lay leaders	Planning new programs in new building space	Add new RE space, evaluate Sunday schedule	Adjust schedule, introduce new programs

The Plan recognized that “to attain the levels of commitment needed to sustain the work of a vibrant congregation,” membership must grow, and in particular, younger members must be encouraged. Demographics which UUs face, in general, and RRUUC faces in its suburban location specifically create challenges for this.

**Expand membership coordinator function, recognize & bring out talents of members/friends. Add office help** for membership efforts. The Membership Coordinator’s time expanded to 35 hours/week, though part of this was to absorb a communications function. A small volunteer group (formerly the newsletter team) works on the membership function (e.g. mailing packets to prior Sunday visitors, referring those with children to RE staff) under the supervision of the Membership Coordinator.

**Increase membership** to 800 members by 2011, from 665 in 2005/6. In fact, membership had dropped to 596 by April 2010 (see graphs at end of report). There is an organized and active membership committee, supporting the membership coordinator, but despite clear presence and much effort (bring-a-friend Sundays), new members each year either do not or just barely offset those members who die, move away, or voluntarily depart. In the past year, of the 24 members removed from the list, 13 died or moved away, and the rest moved to other congregations, sought change in status to Friend, and left for health or theological reasons (questioned UUism). No one recorded with RRUUC staff a resignation as a result of dissatisfaction with services. However, this may have been a politeness on the part of departing members, some of whom, anecdotally, shifted to other congregations in the area because of unhappiness with RRUUC programs or ministers. The Membership Committee believes the original goal was unrealistic, in any case.

**Increase Young Adult Programming.** Once the young adult intern (Amanda Poppei) who was actively supporting such programming, and a couple of the group leaders, moved away from RRUUC, young adult programming fell by the wayside for lack of lay leadership. New young adult visitors ask about activities; the Membership coordinator offers to connect young adults if they will organize events, but there has been no take-up. A covenant group composed of young adults still exists. No ministerial intern is planned until a permanent senior minister is named, two years hence, so that opportunity to take on this function is not imminent. The recent effort to nominate from the floor at the annual meeting a couple of younger candidates to the board suggests congregational concern to address this issue, even though the effort failed to result in their election. While a few young adult couples do participate, some more actively than others, the recent appearance of newborns in this group has changed their needs and abilities. The part-time young adult coordinator envisioned in the strategic plan was never hired to replace the ministerial intern who left, nor really even discussed by the board. Cross-denominational research has indicated that dedicated staffing is key to attracting young adults.

**Experiment with new programming and good use of new space:** Soulful Sundowns were tried a couple times in the past four years, with different timing, and emphasis on poetry and music. Unexpectedly, this appealed not to the sought-after young adults, but to the older, retired members. However, new Fellowship room space has allowed an increase in intergenerational togetherness, with children’s activities in the fellowship room, plus game night. The social action week (see goal #1) has a lot of family-oriented activities also. Recently, efforts to grow a garden on church grounds have resulted in intergenerational activities and learning opportunities for all. All of these could attract more young families in the future. During regular worship service, within current time/order of service structure, some experimentation has been tried – more music-centric experiences (such as the Crystal symphony), regular youth services once a year, an animal blessing service in the summer. These suggest potential exists for more experimentation. Adjustments to timing of the two regular services have been under discussion, but current presence of CC&C in between the two services presents a constraint. Attendance has been clearly dropping especially at the second service and RE program. On the other hand, new rentals of RRUUC space have been very successful – e.g. OLLI classes, a new choral group, and various community-building groups. Even though these do not bring people initially interested in UUism, there is an opportunity for them to see the “estate” and pick up materials. The Membership Coordinator tries outreach with some of these rental groups.

**Observations:** The biggest disappointment of the plan may be the inability to grow membership, despite a vigorous and creative committee and more hours for the staff involved. This has limited development of volunteers, lay leaders, and financial resources to attend to current needs, and might have thus further hurt growth. Static or declining membership is the rule for most UU congregations in the JPD area over the last ten years, with the exception of All Souls, and an occasional bump-up at Fairfax, Bull Run, Annapolis UU congregations. Certainly the vibrancy of All Souls has attracted away some RRUUC families who live in DC. The programming and timing of the second service, where most of the loss appears to occur, and the focus on young adults, should be analyzed during upcoming strategic planning, or even earlier by ministers and board, to determine what changes might result in improved attendance/membership, especially of younger adults, with consideration given to arranging for staff time to be dedicated to attracting young adults.

**Goal #3 Unite in the Spirit of Fun and a Culture of Caring**

Objectives	Responsibility	Where in 2006?	Tasks	By 2011
Intergenerational Programs	Board/Ministers	Many programs include multi-ages	Enhance	Regular Inter-gen programming
Catered lunches	Board/ministers	Youth provide once a month	Provide lunch every week	Weekly catered lunches
Culture of caring and team training	L&N Committee	No training offered	Set up training	Regular training
Evaluate our name	New Bd committee	Committee forming	Evaluate name options for RRUC	Achieve agreement on name
Internal Communications	Board committee	Sunday Bulletin, monthly newsletter	Develop/implement plan	Improved internal communications
Governance	Board	Behind other churches	Develop/implement	Improve governance

Responding to the expressed desire for more “togetherness”, the Strategic Planning summit developed ideas for having fun as a whole congregation. Being UUs, the ideas for fun also pointed toward purpose: community service opportunities and learning to be more caring.

**Continue and Enhance Intergenerational Programs** Fellowship hour has become more family-friendly with the larger Fellowship space and special child-oriented equipment. Action week offers intergenerational activities. The new RE Garden project involves families, and connects with other RRUUC activities (Shepherd’s Table). More active youth choirs perform regularly. Festivities and fundraisers continue to involve youth with the adult groups (Murder Mystery Dinner Theater). Holiday services engage children; family movie nights continue. The Inaugural Ball in 2009 was an example of a fun, partly intergenerational activity that was innovative and welcomed.

**Offer catered lunches after second service.** Youth are no longer doing this regularly. Neither the board nor the ministers organized this on a regular basis, though the occasional lunches (e.g. before the annual meeting and during the Bazaar) were prepared. A reactivated kitchen team hopes to inspire and provide more such meals.

**Culture of Caring and Teambuilding** Training lay leaders on how to nourish a culture of caring in their committee work was the hope. The L&N committee offered leadership training (which focused on topics such as leadership development and respectful disagreement or conflict resolution) in recent years.

**Evaluate our Name:** The word “church” put off some people for years. The Board chartered a Name Evaluation Committee which pursued the many options, and arranged focus groups to get feedback from the congregation. Although strong feelings were evident, caring prevailed, and changes were approved at the 2007 annual meeting, when RRUC became RRUUC, the River Road Unitarian-Universalist Congregation. This change was implemented in print, official welcoming during the service, signage, web

and other contexts. External signage has begun to reflect this name change (corner sign) though the goal of signage visible from River Road remains to be achieved.

**Internal Communications** objective was intended to evaluate our traditional newsletter, emails, and Sunday Weekly Bulletin to find the best ways of communicating, financially and in line with member practices. The hard copy monthly Newsletter was dropped completely, replaced by weekly emails, which share announcements, meeting information and joys/concerns. Sunday bulletins continue. “E-all-announce” emails are sent about special or urgent communications. An effort is made to manage alternate communications for those who don’t use computers. Our website has become far more of a resource for members, since many core documents are available there. No paper directory is generally produced (except the infrequent photo-based one), but member contact information can be found on the website when members sign in. Using the potential of Facebook or other social networking tools is still in experimental stages.

**Governance Structures:** The Board has been trying to address governance issues, with a view to what comparable congregations do, particularly the distinguishing of responsibilities between Board and staff and the coordination and oversight of committee work. Deliberation on proposed changes is ongoing, with a plan to focus on this soon with the interim minister. The Board has reviewed the mission statement and Board member responsibilities, is now looking at communication and reporting and would strongly recommend that a budget be part of the strategic plan, with a dollar amount assigned to each goal. This would need to be coordinated with the Finance Committee.

**Continue pastoral care program.** The Pastoral care team continues proactively to assist people and engage new members in caring, with training and supervision by a minister.

**Observations:** The “name issue” that troubled people has finally been resolved, although physical placement of it on the building remains to be funded. To really understand whether “fun” and “caring” is being experienced at RRUUC, a question about this will need to be included in the planned survey. Certainly there are activities that generate fun, and intergenerational activity has increased, thanks to intentional efforts by the RE staff and judicious use of new space. Caring as a culture does continue to be a part of what RRUUC does, not only through the welcomed efforts of the pastoral care committee and the ministers, but thanks to many individuals who take the time to build relationships within the congregation, often through small groups. The internal communications have been modernized, and use of appropriate technology is advancing, although it would be good to survey the non-tech elders/founders who may feel more left out by this development. For the tech-savvy, information is more readily available than it was in the past, thanks to the website and weekly e-bulletins. Getting a handle on governance, given high priority by each board, moves slowly toward completion.

**Goal #4: Nurture Spiritual Growth**

Objectives	Responsibility	Where in 2006?	Tasks	By 2011
Increase small groups	Ministers	Five covenant groups; numerous other groups	Add one group per year	Ten small groups
Sacred Space	Ministers	No dedicated space	Plan/implement	Dedicated sacred space available
Memorial Wall	Mem Wall Comm.	Chartered committee at work	Plan/implement	Memorial Wall in place

The 2006-2011 RRUUC Strategic Plan reflected a desire for RRUUC to “function as a vital place to nurture and grow the spiritual life of its members....to continue excellent worship and to strive to add fresh and provocative ideas into the mix for increased variety in services.” In particular the Plan stated that members “yearn for sacred space in our church facilities and for some space to be reserved for worship and quiet reflection.”

**Increase small groups:** While RRUUC had up to eight covenant groups as recently as 2009, RRUUC today has the same number of covenant groups as it did in 2006-2007—five. While the Associate Minister provides training and counseling, coordinating and managing formation of covenant groups was largely given to three lay leaders, but currently remains with only one person. A co-chair is now being sought to continue to offer an active covenant group program. That said, recent efforts to create new covenant groups encountered dwindling demand. This could be in part because self-generated small groups of people who met at RRUUC are quite numerous, some long-standing and some still forming. These groups probably meet some social and spiritual needs of their members, but have no formal programmatic ties with RRUUC, other than that there must be RRUUC members in the groups to use church facilities. Data on how many such groups exist is not easily available. Many other, more programmatically-connected ongoing groups might qualify as ‘small group ministries’ such as the book groups, Uptown Lunch Group, some social justice task forces and Daytimers (the latter revived at one point by a lot of ministerial attention). These groups may not be formally dedicated to the objectives of nurturing spiritual growth but they do offer many opportunities for reflection.

**Sacred Space:** Though RRUUC has recently opened its new wing, no dedicated sacred space was included in the final plan. An informal space for meditation and prayer was set up on the balcony for some time, though it was regularly displaced. The outdoors Memorial Garden, completed in 2002, can also serve in good weather. The policy is that available space must be multi-purpose, to meet current needs and demand for rentals. A volunteer-driven initiative to offer labyrinth walks in the Fireside Room met with some success, as an AE class (and once with the youth group).

**Memorial Wall:** A lay-led committee to establish a Memorial Wall functioned until 2007 as an outgrowth of the Memorial Garden Committee, which was incorporated into the Buildings and Grounds committee. The new Committee visited memorial walls in other UU churches and engaged in some preliminary planning, identifying names of deceased past members. However, a structure for the program was never completed, next-of-kin were hard to identify and some conceptual issues impeded final decisions. As the financially demanding new building construction got underway at the same time, the congregation showed insufficient interest in contributing added funds for this purpose. Remaining work includes setting the fees for including names in the Memorial Wall, designing the Wall, developing a brochure for the program, and organizing a fundraising effort to construct it. The Committee did not meet for several years but a reactivation was attempted near the end of CY2010.

**Observations:** Ministers feel most of what they do is directed toward spiritual growth. RRUUC does not now have a member-led Worship Committee that might have functioned as a touchstone to monitor progress or to champion further actions in this area<sup>3</sup>. Proactive promotion of small group ministries and training of leaders was the function of a former Associate Minister. On her departure, this function was taken up by lay leadership with training and supervision by the current Associate Minister. RRUUC leadership appears to be unenthusiastic about removing space available for other church programs so that a truly dedicated sacred space could be organized. As a result, action toward achieving this goal has been limited to creative but temporary settings (e.g. sanctuary balcony, when not in use for other events). Recently, some ministerial support is focusing on reviving the Memorial Wall initiative, but it remains to be seen whether this is truly a priority for many in the congregation, as some are said to feel that the Wall would honor only those whose families could pay for this, and thus might be less inclusive than we would want. Thus, without paid staff or members driving Goal 4 of RRUUC’s strategic plan, work towards the goal appears to have been sporadic. There are also several vacancies in lay leadership instrumental in achieving Goal 4. Nevertheless, ministers point to opportunities for spiritual practice at RRUUC in the last

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<sup>3</sup> The former senior minister of RRUUC did not show interest in a Worship Committee, preferring that all spiritual matters be left to professional staff except for involvement in lay-led worship.

10 years, primarily pre-dating the adoption of the current strategic plan, such as candle-lighting during the services and lighting candles before committee meetings and including “check-ins.” Demand apparently remains high within the congregation for greater spirituality. The Adult Education Committee has decided to focus only on courses related to spiritual growth for next year, rather than providing a full array of courses as previously offered. The RE program has increased spirituality in its activities.

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### **Other Strategic Plan Goals**

**Lay leadership provides an exciting opportunity and a resource for RRUUC** While the extent of lay leadership at RRUUC continues to be broad and admirable, a number of programs noted above are languishing or disappearing for lack of continued leadership (e.g. young adults) while the creative ideas for growth of activities have not been able to take off for lack of such voluntary leaders. Even more staff time and attention to identifying volunteers (such as membership coordinator staff time increase) has not produced the depth and energy needed to add significantly to, as well as replace departing, lay leaders. L& N committee does keep up with recommending new board members and L&N members, and decides leadership recognition awards. Some years, L+N felt that was more than enough work for its committee, while other years, the committee made an effort to offer leadership development and respectful disagreement training, but encountered modest demand.

**Staffing compensation, benefits and increased time to meet needs** Annual budgets have given priority to bring staff compensation and benefits in line with UUA guidelines, so annual COLAs were approved, except for one year when national living costs went down. Staff performance evaluations were prepared in a timely way in recent years. Performance evaluation of the ministers (implemented differently from other staff) lapsed during the plan period, but were undertaken in 2009. The Membership Coordinator added the Communications function and her time was raised to 35 hours, in addition to a part-time communications assistant. Reconfiguring of RE staffing took place after departure of the DRE, so that the two main RE staff divide younger children and middle/high schoolers. A young adult coordinator was never added. Custodial staff, also reconfigured (no building engineer, but four custodians), seem to meet the basic needs for cleanliness and set-up. Accounting staff time was increased per the plan. While retirement benefits are excellent, health care benefits are only very modestly subsidized. The declining pledge income and higher maintenance and mortgage payments for the new building further constrain financial resources of RRUUC, while energized rentals help offset this. Current staff is fully engaged and probably adequate to our current size and budget.

**Renovation of original RRUUC building is completed and reserves protected for long-range needs** Major renovations took place largely as planned, most recently of the front entrance and foyer, as well as the completion of the new wing – a major breakthrough and positive development for the congregation. Some renovation (e.g. cabinets in the classrooms) were not undertaken, however. The 2006-2011 Strategic Plan contained a rudimentary estimate of some of the major anticipated building maintenance costs. Those estimates have not been integrated into RRUUC’s financial planning. The Building Committee commissioned, and now has in hand, a vastly more sophisticated building maintenance estimate as a planning tool for future strategic plans.

**Other Observations:** The Strategic Plan provided much thoughtful guidance on evaluation and monitoring, partly in the form of suggested questions for evaluation surveys. If these surveys are developed (and coordinated with questionnaires seeking input to the ministerial search process), richer understanding of progress towards some of the more intangible goals could emerge.

One governance issue is the degree to which financial planning and management is integrated into the plan and into the board’s implementation of the plan. Interviews with some Finance Committee members and their board liaisons suggest that the Board regularly kept the Strategic Plan in mind during its deliberations, at least in the first years of the plan. Regarding the financial aspects of the Plan, the Finance Committee chairs understood that their duties were to ensure that RRUUC had sufficient funding to carry out those activities of highest priority to the Board. The Board may have been guided in part by

the Strategic Plan, but other unanticipated priorities and other Board decisions resulted in a reordering of priorities, and hence of budget allocations. While some staff compensation and benefit adjustments did occur, these were less a result of Finance Committee recommendations than the Finance Committee response to requests from the community and the priorities set by the Board.

The Finance Committee was not consulted in the development of the Strategic Plan. The current and prior chairs would encourage including the Chair of the Finance Committee (or his/her appointee) in future planning in order to inject a strong dose of reality into its financial feasibility. They also recommend that the Stewardship Campaign each year take note of the Strategic Plan. This may be facilitated by the creation in late 2010 of a permanent Stewardship Committee to consider funding needs year-round. Unfortunately, fiscal realities in the last few years have not allowed much flexibility -- it has been more a matter of stretching the dollars to cover the essentials. Nevertheless, pledge revenues on average over the plan period very modestly increased until 2010-11, although expenditure needs increased more. (See graph in Addenda).

Finally, one sore point for many in the congregation was not touched in the Plan: contributing RRUUC's "fair share" to the UUA and JPD. The financial constraints have consistently led RRUUC boards to decide to contribute only 50% of the expected national and district dues, as well as to cull the membership lists regularly for departed members, which resulted in a more realistic number (as the overall numbers began to fall) on which to base these dues. Longstanding complaints from a number of RRUUC members about this shortfall suggest the board underestimates the congregational priorities in this regard.

Addenda:

1. Graph on number of members and pledge units at RRUUC
2. RE Enrollment trends
3. Pledge revenues and average pledge size.
4. Graph on evolution of membership at JPD area UU congregations.

Prepared by: Strategic Planning Review team commissioned by the Board, June 2010  
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