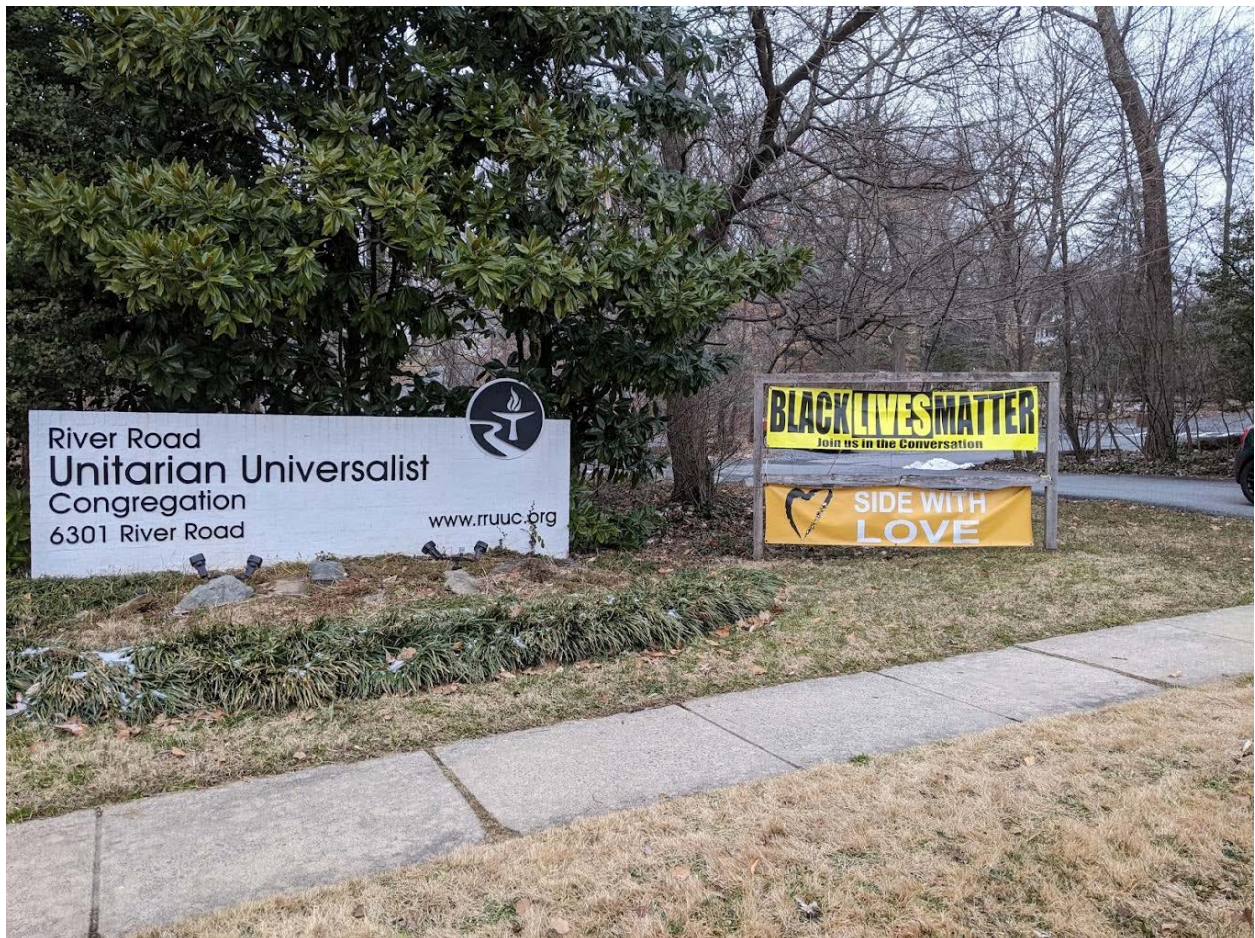


RRUUC Strategic Plan

*Building Our Beloved Community Together
From the Inside Out & the Outside In*

July 2023 – June 2028



River Road Unitarian Universalist Congregation
Community, Spirit, and Service

I. Introduction

What you see before you may initially seem like a whole lot – words on pages can be difficult to translate into meaningful strategic choices for whole groups of people. And yet these words (and charts and color-coded graphs!) all combine to tell a story we are authoring together about the near-term future of River Road Unitarian Universalist Congregation.

As a Board and a congregation, we periodically revisit our priorities together, knowing that the dynamic nature of these times calls us to leadership that is clearer in its intent and more accountable in its outcomes than the ever-popular leadership tactic of throwing the proverbial spaghetti at a wall and seeing what sticks.

The last time we undertook this revisiting of our priorities was in 2015. At this point, 2015 is one pandemic, several economic and political upheavals and what feels like a whole lifetime ago. Given that the priorities and resources of a congregation are meant to shift not only with the times, but with the lived experience and spiritual needs of the people gathered together to form the body of congregational life, we're due for fresh reflections.

And so, some years removed from our last strategic plan, having come through the most acute phases of the COVID-19 pandemic, we're ready to begin this new phase of our life together. Among the changes we've faced in the last eight years since our previous strategic plan is a sense that "we" as a congregation is a larger and perhaps more amorphous phrase than it used to be.

We, the congregation, passed a racial justice resolution in 2020 and adopted the 8th Principle in 2021. The Board of Trustees also created an 8th Principle fund in 2021 so that the Board could support dismantling racism and other oppressions in ourselves and our institutions, and committed itself to prioritizing our social justice work. The most recent example of this commitment was the Board chartering the Land and Labor Acknowledgement Task Force. With 8th Principle funds, the Board supported the Task Force's proposal to memorialize our land and educate ourselves and our neighbors with respect to the Piscataway peoples who resided on, and enslaved Africans who worked, the land where our building stands.

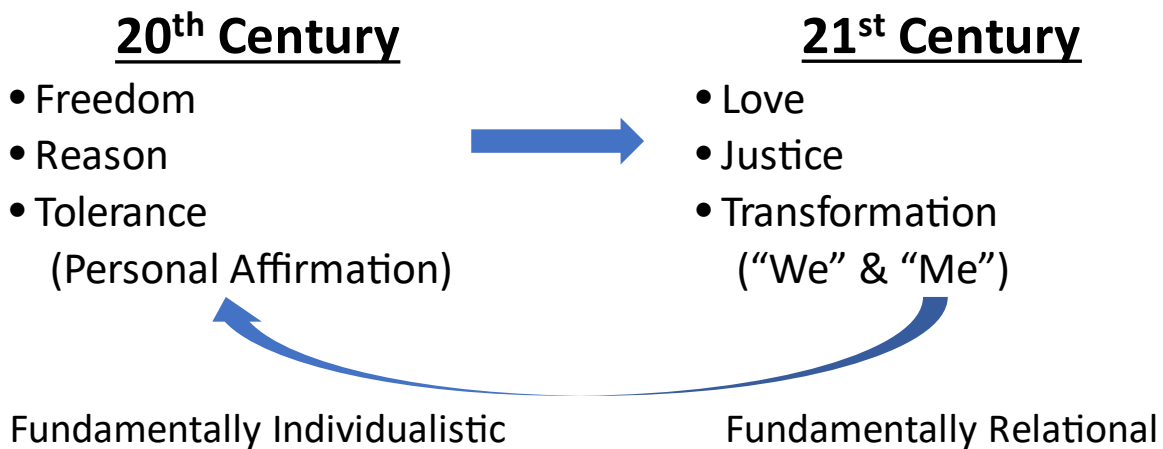
As the meaning of membership itself changes, and voluntary associations including River Road's struggle to maintain a sense of consistent institutional commitment from younger generations, the "we" of congregational life extends beyond the traditional metrics of the ratio of the congregation's membership to non-member friends, the number of building users, renters, faith partners, and those beyond our



doors with whom we are missionally aligned. To that end, this new strategic planning process has intentionally included feedback not just from our members and friends on an internal level, but from a variety of partners across the span of faith and public life.

In the figure below, you'll see our simplest layout of some of the changes we have seen reflected in the larger progressive religious world during the last decade. Whereas Unitarian Universalism in the 20th century focused largely on the individual's freedom and the tolerance of a variety of religious viewpoints, emerging religious liberalism seeks to address the fundamental loneliness and disconnection felt by so many people in

What are we UUs about? How do we expand the "We" while still supporting the "Me"?



contemporary society. 20th century religious liberalism stood as a necessary counterpoint to conservative religious fundamentalism. And while that role remains important, in many ways, 21st century religious liberalism stands as a counterpoint to the isolation, polarization and disconnection that mark our collective lives.

Reflective of this analysis, you see here a Strategic Plan that is always dancing between commitments to continuing to strengthen the foundation of our internal structures and sources of connections at River Road and our missional objectives by expanding our connections to the world around us. One cannot thrive without the other – the institution (and our relationships within it) must remain strong in order for us to be effective agents of hope in a struggling world. Likewise, we must be increasingly



effective in our external commitments if we are to be authentic in our congregational and spiritual lives. These two spheres of commitment are not in tension, but in relationship.

In the plan we have identified a set of three strategic priorities for each of the five years. Each set of strategic priorities may change according to the amount of progress made the preceding year, as well as the changing needs of our congregation and community. At each year's-end, the Board of Trustees will develop an implementation work plan for the following congregational year including strategies, action steps and a timeline based upon the next set of strategic priorities as well as those that may remain to be accomplished.

In this way, the plan is not meant to be so many words stuck on a page, but an accountable, conversational, constantly revisited roadmap for the way ahead. Far from throwing spaghetti at the wall, we're charting our way forward, together.

II. Methods

Our visioning and strategic planning processes were carried out in two phases. Phase 1 took place between December 2021 and June 2022. Four questions were asked in a number of on-line and in-person discussion groups and in an on-line survey of members and friends, with a total of approximately 100 participating overall. Four questions were asked: 1) What has made you feel included/welcome in our congregation? 2) Are there aspects of our congregation that are not welcoming? 3) What would it look like if we are individually and collectively living the values of the 7th & 8th Principles? 4) How can we reframe "doing the work" as joyful rather than obligation?

The responses to each of the four questions were documented and analyzed by three independent reviewers before being consolidated into a number of cross-cutting themes. Cross-cutting thematic examples include: Connections and community; not enough structured opportunities to develop relationships, especially for young adults and retired congregants; being treated differently because one is a person of color; increase community-based collaborations with existing and new organizations and congregations; more willingness to engage in difficult discussions; focus on getting to know each other as well as the action outcomes; broader communications about social justice opportunities and showcasing our social justice successes. All themes were documented to be integrated into the second phase of the planning process.



Phase 2 took place between July 2022 and April 2023. In the summer and fall of 2022, the RE team held several small group discussions with members about their religious/spiritual journeys to becoming part of our UU community. In January 2023, immediately after a Sunday service focused on visioning our future, six in-person groups and two on-line groups (n > 100) were held answering three new question sets: 1) Faith formation provides opportunities for learning about and practicing our UU faith and for developing and sharing our personal spiritual journeys. How can the Board of Trustees best support faith formation among the congregation? 2) When you imagine our congregation in five years, what can you imagine about who, what, and how we would be? Without considering practical concerns, what would you dream of us being and becoming? 3) What does our "community" consist of? (RRUUC and our partner organizations?) What geographic area should we be serving? (Bethesda, Montgomery County, Washington DC, etc.). Complementing our exploration of our internal vision, we added a number of key informant interviews with lay leaders of Cedar Lane and Fairfax UU congregations (i.e., Potomac Partnership); leaders of longtime community partner organizations (i.e., AIM, Beacon House, La Clinica del Pueblo, Kid Power, Inc.) as well as the Washington Ethical Society.

The questions and answers for the internal discussion groups and partner organization key informant interviews were analyzed by different pairs of independent reviewers to identify cross-cutting themes and action steps emerging from among our members and our partner organizations. Cross-cutting themes from the 2021-22 discussion groups and surveys were integrated with the themes from the 2022-23 information. Subsequently, groups of two to three reviewers ranked the relative importance of different cross-cutting themes in order to identify high strategic priorities that might be addressed in our five-year strategic plan.

Finally, based on an assessment of the staff, lay and financial resources (costs) needed to implement high priority (value) strategies (and potential action steps), the five-year strategic plan was developed. A key factor in assigning strategic priorities to different plan years was an assessment of the value of implementation vs. the available resources needed to meet the implementation costs.



III. The Foundation Upon Which We Build

River Road Unitarian Universalist Congregation has many strengths. We serve the entire Washington DC Metropolitan Area. Through our new online Sunday services, we have gained friends and members from across the country. We partner with organizations and other congregations to address social justice issues on the local, state and national levels. Our Sunday services are outstanding, incorporating thought-provoking sermons that both challenge our minds and move our hearts, with amazing music representing an increasing variety of cultures and faith traditions. We have increased our social media outreach through Facebook, Twitter, Tik-Tok, and most recently, a series of podcasts. Many members tell us that they first joined the congregation because of the excellent religious education for children and youth. The series of Wellspring courses offers opportunities for adults to focus on their individual spiritual growth.

So where do we need to go? Over the last two years, friends, members and partners have shared their perspectives on this question. For example, while religious education for children and youth is very strong, opportunities for continued engagement and spiritual engagement through young adulthood are limited. Moreover, we do not intentionally work with parents of teens and young adults to re-define their spiritual lives in their own emerging stages of life. We envision spiritual education for all ages, including older members and friends who now live in retirement communities and often feel isolated from the congregation. We can look at new models of spiritual education which include short, accessible components appropriate for our busy members.

If our congregation is to continue to thrive and grow, we need to learn how to more effectively engage increasingly diverse newcomers, and especially young adults who may be seeking a very different congregational experience than did their parents. To engage new members, we must reinvent our model for serving our Beloved Community through volunteering, rather than assuming that we will always have a growing cadre of retirees with lots of time on their hands to serve as volunteers. Volunteering is something we can all do for each other. Members of a vibrant congregation engage in service together and perceive volunteering as a spiritual practice. Currently, River Road has new visitors weekly. However, we need to better



welcome and continue to support them, encouraging them to move from being friends to becoming members and eventually, leaders in the congregation. Finally, we must determine how best to leverage our staff, volunteer and financial resources in collaboration with other congregations to meet the needs of both our congregation and the people we serve in our communities.

The following strategic priorities are designed to begin to address these issues. Along with our strategic plan, we will be creating a new mission and vision statement during the next fiscal year, 2023-24, again based upon the perspective of our members, friends and partners.

IV. Strategic Priorities

Year 2023-24

Create more opportunities for older adults to engage with UU life.

Develop new opportunities for in-person and virtual connection among members and friends of the congregation.

Increase volunteer engagement, develop volunteer leadership, and increase financial resources to support building Beloved Community within and outside of RRUUC.

Year 2024-25

Prioritize social justice efforts based on community needs assessments, partners input, and local, state and national issues, in collaboration with the Potomac Partnership.

Building on RRUUC efforts to educate the congregation around environmental justice, conduct education and social actions on local, state, and national levels.

Identify opportunities to leverage current financial, staffing, and volunteer resources through collaboration with the Potomac Partnership.

Year 2025-26

Develop emerging adult (18-25) and young adult (26-35) ministries.

Explore new models for spiritual education.



Explore how the RRUUC building and grounds can be leveraged to better align with UU values.

Year 2026-27

Deepen opportunities for in-person and virtual connections between members and friends of the congregation.

Adopt new models for spiritual education.

Deepen commitment to using River Road building and grounds to better align with UU values.

Year 2027-28

Implement community service model which aligns with UU values.

Mobilize members of the congregation to partner with communities to provide on-site services.

Deepen new and current social justice partnerships in the community.

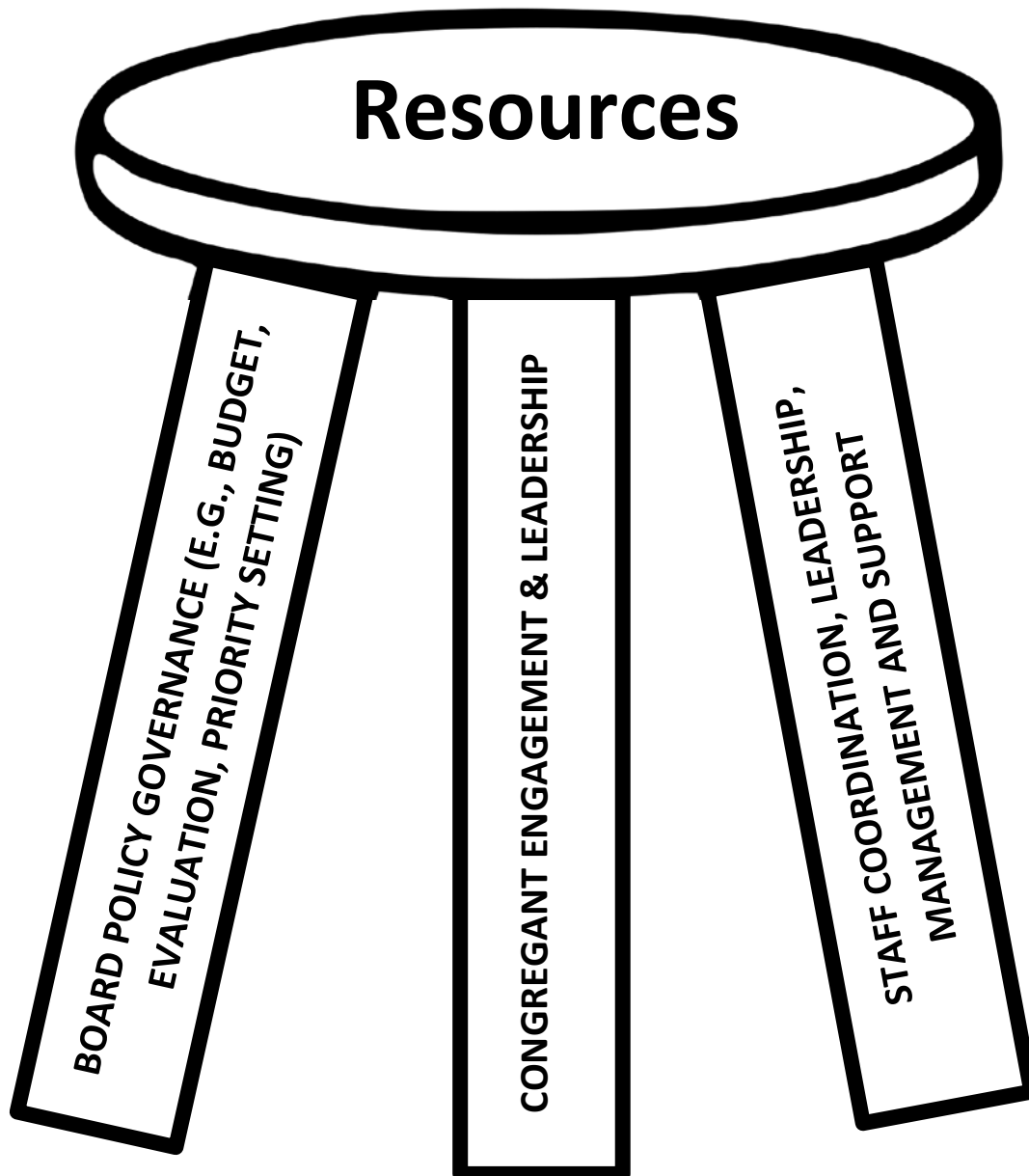
V. 2023-24 Implementation Plans (Strategies and Action Steps)

Annual Strategic Plan Implementation - A Three-Legged Stool

As the diagram below depicts, the resources our congregation brings to the table in the coming year (and in future years) can be viewed as a three-legged stool. The leg on the left, represents the resources the Board of Trustees brings to the table through its policy governance work. Importantly, the membership of the Board is refreshed every year with new members being elected by the congregation to add value with their new and different perspectives on the challenges and opportunities that lie ahead. The leg on the right, represents the outstanding ministerial and administrative staff that every year provides leadership stability and support helping all of us together to realize our vision of Beloved Community. The leg in the middle of the stool, represents the potential strength of all engaged congregants and emerging lay leadership. Taken together the whole can be greater than the sum of its parts only as long as all three legs



of our resource stool are equally supporting the weight of our congregational needs and working together collaboratively.



Increase volunteer engagement, develop volunteer leadership, and increase financial resources to support building Beloved Community within and outside of RRUUC

- a. Design and implement new volunteer roles
 - i. Establish volunteer committees and articulate charges for the following two committees: (1) Older Adults Ministry and (2) Connections Team
 - ii. Create and implement leadership development plan
 - iii. Provide training to volunteer leaders including being in “right relationship” and Generative Conflict Training.
- b. Provide the Older Adults Ministry and Connections Team with strategic and spiritual direction
 - i. Hold visioning session for each committee
- c. Identify potential Potomac Partnership opportunities for sharing financial and volunteer resources
 - i. Conduct series of planning sessions with senior leadership of the three congregations

Create more opportunities for older adults to engage with UU life

- a. Better support Unitarian Universalists living in local retirement communities
 - i. Identify two co-lead volunteers in each of the local retirement communities with large populations of UUs
 - ii. Arrange for on-site services with ministers and lay minister
 - iii. Train co-leads to set up small groups
 - iv. Create opportunities for residents to participate in spiritual education and social justice efforts within retirement communities
- b. Better support older River Road congregants
 - i. Arrange carpools to Sunday services and activities during the week
 - ii. Explore opportunities for older adults to mentor children and youth



Increase opportunities for in-person and virtual connections between members and friends of River Road

- a. Expand online engagement
 - i. Identify and address barriers to participation in online chats following services
 - ii. Create inspirational messages and calls to action to post on Twitter, Facebook, Tik-Tok, and in e-blasts daily
 - iii. Explore interest among members who only engage online to create online “neighborhoods”
- b. Enable congregants to interact in person socially
 - i. Hold potluck dinners at River Road and in homes
 - ii. Hold large staff-letter events
 - iii. Create and publicize new small groups
- c. Create a more welcoming environment
 - i. Expand cadre of greeters/ushers
 - ii. Pair new members and friends with existing members and friends to introduce them to congregational life
 - iii. Continue to explore how Sunday services can be structured to make them more intergenerational, interactive, and incorporate different cultural music and readings in culturally appropriate ways
 - iv. Explore holding blended service with Scotland AME
 - v. Create Newcomers Soul Matters groups
 - vi. Restructure coffee hours to encourage both introverts and extroverts to feel safe, heard and seen



VI. 2023-24 Action Plan and Accountability Criteria

Goal 1: Increase volunteer and financial resources					
Strategy	Action Steps	Staff Resources	Volunteer Resources	Completion Date	Evaluation Measures
Design and implement new volunteer roles	Establish volunteer committee: Older Adults Ministry	A: Senior Minister	R: Lay Minister for Pastoral Care (0.33 FTE) I: BOT	10/31/2023	Lay Minister to provide BOT with semi-annual report (January and June of each congregational year)
	Establish Volunteer Connections Team	A: Communications Director Contract with an external (UUA) Membership Consultant	R: Connections Team	09/30/2023	<ul style="list-style-type: none"> - Number of volunteers on Connections Team - Member and Friends Survey to assess the impact of Connections Team
Design and implement new volunteer roles	Provide training to volunteer leaders including being in "right relationship", generative conflict (engage conflict in ways that generate more possibilities and greater connection) and small group facilitation	A: Senior Minister R: Director of Religious Education UU Arlington will co-host a Leadership Development Curriculum through FY24 Will include Generative Conflict by Weaver Learning Lab		06/30/2024	<ul style="list-style-type: none"> - Training evaluation surveys for volunteer participants
Provide Older Adults Ministry and Connections Team with strategic and spiritual direction	Hold visioning session for each committee	A: Associate Minister	R: Lay Minister for Pastoral Care	09/30/2023	Conversations with committee members on clarity of roles
Identify Potomac Partnership opportunities for resource sharing	Conduct series of planning sessions with senior leadership from the three congregations	A: Senior Minister	R: PP chairs/vice chairs R: BOT	09/01/2023 through 05 01/2024	Quantifiable Demonstration of: <ul style="list-style-type: none"> - Staff sharing - Volunteer sharing - Collaborative activities

A – Accountable

C - Consulted

I – Informed

R – Responsible



Goal 2: Create more occasions for older adults to engage with Unitarian Universalism

Strategy	Action Steps	Staff Resources	Volunteer Resources	Completion Date	Evaluation Measures
Better support Unitarian Universalists living in local retirement communities	Identify two co-lead volunteers in each of the local retirement communities with large populations of UUs	N/A	A: Lay Minister for Pastoral Care R: Older Adults Ministry	09/30/2023	1) Lay Minister to provide BOT with semi-annual report (January and June of each congregational year) 2) Two co-leads identified per community
	Create opportunities for residents to participate in spiritual education and in social justice efforts in their retirement communities	N/A	A: Lay Minister C: Social justice leaders	01/01/2024	Lay Minister to provide BOT with semi-annual report (January and June of each congregational year)
Better support older River Road congregants in wider community	Arrange carpools to Sunday services and activities during the week	N/A	A: Lay Minister for Pastoral Care R: Pastoral Care Team	11/15/2023	Lay Minister to provide BOT with semi-annual report (January and June of each congregational year)
	Explore opportunities for older adults to mentor children and youth	R: Director of Religious Education R: Family Ministry Coordinator	A: Older Adult Ministry	05/01/2024	Lay Minister to provide BOT with semi-annual report (January and June of each congregational year)

Goal 3: Increase opportunities for in-person & virtual connections between River Road Members & Friends

Strategy	Action Steps	Staff Resources	Volunteer Resources	Completion Date	Evaluation Measures
Beyond Sundays: Expand	Identify and address barriers to participation in online chats following services	A: Communications Director		09/01/2023 to 06 30/2024	Conduct Member & Friends (M&F) Connections Survey

Enable congregants to socially interact in-person	Hold potluck dinners at River Road and in homes		Fun Squad	09/01/2023 to 06 30/2024	- # of events held - M&F Connections Survey
	Hold Action in Montgomery (AIM) training on one-to-one outreach and launch new one to one initiative		A: AIM partners	Postpone to FY25 cycle	
	Create and publicize new small groups (e.g., Fun Squad, Leadership, Beyond Sunday small groups)	A: Communications Director	Small group leaders	09/01/2023 to 06 30/2024	M & F Connections Survey
	Host big, fun, staff-led events (e.g., Clifathon, Return to River Road Day)	A: Associate Minister R: Director of Religious Education R: Religious Education Coordinator	Fun squad	09/01/2023 to 06 30/2024	M & F connections survey
Create a welcoming environment	Expand cadre of greeters	A: Communications Director	R: Connections Team C: Board Members to serve as greeters once/year	09/01/2023 to 06 30/2024	Number of new greeters
	Create Newcomers Soul Matters Group	R: Director of Religious Education	Connections Team	12/01/2023	- Conversations with new friends/members
	Pair new members and friends with existing members and friends to introduce them to congregational life		A: Connections Team	09/01/2023 to 06 30/2024	- Number of pairings



Goal 3 (cont.): Increase opportunities for in-person & virtual connections for River Road Members & Friends					
Strategy	Action Steps	Staff Resources	Volunteer Resources	Completion Date	Evaluation Measures
Create a welcoming environment	Continue to explore how to structure Sunday services as to make them more: intergenerational, interactive, incorporate different cultural music and readings in culturally appropriate ways	A: Senior Minister A: Associate Minister R: Director of Music R: Director of Religious Education R: Religious Education Coordinator	C: Board Members	09/01/2023 to 06/30/2024	M & F Connections Survey
	Hold a blended Sunday Service with Scotland AME Church and RRUUC	A: Senior Minister	Educating 4 Change Pathway members	06/30/2024	Social Justice leaders to meet in June 2024 to evaluate progress with partnership
	Restructure Sunday Coffee Hours to encourage introverts and extroverts, families and solo attendees to feel safe, heard and seen	N/A	A: Connections Team	04/01/2023 – 06/30/2024	M & F survey
Online engagement	Create inspirational messages and calls to action to post on Twitter, Facebook, Tik-Tok and in e-blasts daily	A: Communications Director C: Associate Minister	R: Existing Committees to submit content	09/01/2023 to 06/30/2024	Social Metrics: - Click-through rates - Interactions M&F Connections Survey
	Intentional Small Group Ministry: Explore interest among members who only engage online to create online “neighborhoods and small groups	A: Associate Minister	R: Small Group Leads R: Fun Times Squad	09/01/2023 to 06/30/2024	- M & F Survey

VII. Acknowledgements

The visioning and strategic planning team constituted a large and diverse group of lay leader and staff volunteers. The team was made up of the following individuals:

Maureen Beasley – Member, Board of Trustees (Phase 2)
 Linda Bleadingheiser – Former Chair, Board of Trustees (Phase 2)
 Charlotte Jones Carrol – Chair, Immigration Justice Committee (Phase 2)
 Loretta Garcia – Former Chair, Board of Trustees
 Vonna Heaton – Former Vice-Chair, Board of Trustees
 Beth Irikura – Director of Religious Education
 Jon Kerner – Chair, Board of Trustees
 Dave Kiyvyra – Member, Board of Trustees (Phase 2)
 Rev. Nancy McDonald Ladd – Senior Minister (Phase 2)
 Diana Ducey Ludwick – Member, Board of Trustees (Phase 2)
 Rita Parks – Former Member, Board of Trustees (Phase 2)
 Glen Peppel – Former Member, Board of Trustees
 Laura Piervincenzi – Family Ministry Coordinator
 Liz Purcell – Former Board Member, Board of Trustees (Phase 2)
 Lisa Rubenstein – Vice-Chair, Board of Trustees



Natalie Schall, Communications Director

Jenny Sour – Member, Finance Committee

Rev. Amanda Weatherspoon – Associate Minister (Phase 2)

Kim Weichel – Former Member, Board of Trustees (Phase 1)

Bailey Whiteman – Member, Board of Trustees (Phase 2)

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