

The strategic plan below was adopted by the board in Spring 2022 and covered the years 22-23, 23-24, and 24-25. It was based on the plan created in 2019. With one year remaining, and with a fuller-review of the mission, vision and ends planned for 24-25, this is the Senior Minister's Report on where progress is as of June '24.

Vision

A loving congregation that connects with ourselves, one another, and the larger community.

Mission

We care for ourselves, each other, and our neighbors while taking risks acting for justice. We are continuously building an inclusive, empowered, anti-oppressive, anti-racist, multicultural congregation. Our connections foster radical love for ourselves and others.

Ends

- 1. Each person in the congregation is invited into a spiritual life. We are inspired and equipped to share radical love¹ through our daily lives and authentic conversations.²**

Strategy 1A: Our leaders and staff develop worship and programs to enrich our spiritual lives.

1A1: Creative, multicultural, loving **worship and music**. Worship invites spiritual living, (re)connects people, and gives people energy and hope for living their lives. We continue to use multi-platform worship with online and in-person options. High quality and diverse guest preachers and speakers and guest musicians are added to our current offerings. The choir is a source of joy, connection, and is an inclusive and increasingly diverse group. We give more care to make the space beautiful and joyful, in connection with the theme.

Resources: Increase guest preacher budget by \$1000/year and guest musician budgets by \$2000 per year. Ministers and Music Director focus on this area.

Timeline: Begin with 22-23 church year. Recruit musicians and guest preachers who will be regular guests. By 24-25, we will have regular roster of guests and worship will be noticeably more multicultural than it is today. During Rev. Matthew's next sabbatical (probably 24-25), ensure that a large percentage of the guest preachers are Black, Indigenous, and/or People of Color.

¹ See <https://www.betterhelp.com/advice/love/what-is-radical-love/> for a good explanation.

There, it says "The term *radical* is used to describe something that is whole, complete, and thorough. A radical change, for instance, is one that completely overhauls existing standards. Radical love, then, is love that is not fractured in its expression or experience. In more common terms, radical love is unconditional love." "Radical love is the kind of love that can be felt for all of humankind; for everything on earth, alive or not, seeing everyone and everything as interconnected, and vibrant."

² Authentic conversations are meaningful, honest, and deep conversations characterized by respect, curiosity, and growth. People talk about their fears and hopes, sources of meaning, and learn about themselves and others through these kinds of conversations.

We have made progress but by no means completed this task. We have turned to a set of more regular guests, including Rev. Bowie Kling-Garcia and Rev. Allison Farnum. Worship services from Julica Hermann de la Fuente, Matt Meyer, Rev. Karen Van Fossen, Rep. Maurice West, Amanda Thomas, Rev. Suzelle Lynch, Rev. Jim Winkler, Rev. Darrick Jackson and Kelsey Hart were all well-received and many brought a more heart-centered approach. We have made some recent investments in technology that will improve the online experience. I find that I am more creative in the fall and it drops away by the spring, and need to work on this. Musically, there's been a small increase in percussion and contemporary music, but I seek more. People enjoyed Matt Meyer's workshop, and guests such as Ron Holm delight. Nonetheless, we remain fairly consistent in our musical approach. The choir has added a few new folks, but has shrunk overall. Rev. Joyce has taken charge of the altar displaces, with much improvement to the visual space.

The sabbatical preaching will be anchored by Rev. Allison Farnum, a white woman, but an accountable abolitionist who will bring a different style to worship. And hopefully the sabbatical time will help fill the well of my creativity.

Going forward, the worship team will be meeting more regularly and I will work on sustaining more creative and heart-centered work through the church year. We also will convene a music team and aim for more contemporary and rhythmic music in worship. **The congregation to participate in this by being willing to experiment, supporting imperfect playfulness, and supporting additional elements in music.**

1A2: Heart-centered, caring **small group ministry and adult learning**, all of which equip people to share radical love in their daily lives, and to have authentic conversations. Support the Touchstones/Covenant Groups, and other small groups.³ Support the Sauk Valley Group⁴. Offer creative and engaging adult programs, and programs that grow intercultural competencies⁵ and build relationships. Share opportunities in our community partners and with UU organizations, especially for people with marginalized identities.

Resources: Current support for Assistant Minister, Theme-Based Ministry (Touchstone or Soul Matters) Subscription, should be sufficient. Look at partnerships with Womanspace, art groups, and others.

Timeline: 22-23: Enliven existing groups, start new ones, and begin at least one partnership with arts/spirituality organization. Regular support for Sauk Valley Group.

23-24: Census of members; goal: at least 100 members total in a variety of small groups. Support creation of new groups/programs where there is interest.

24-25: Create second partnership with arts/spirituality organization.

³ Includes ramblers, India House, Pickleball, CUUPS, and similar groups.

⁴ UU's in Dixon, Oregon, Leaf River, and nearby communities. They gather monthly for a theme conversation and meal, and have sponsored an Afghan Refugee family.

⁵ Intercultural Competency and Cultural Humility. Competency here means knowledge about your own cultural patterns and that of others, and the skills to navigate cross-cultural situations well. Humility means knowing that we do not fully understand another person's culture(s) and being curious, non-judgmental, and open. Key to both concepts is recognizing that the white, middle-class, Midwest culture is one among many, and not the "default normal."

We have worked to enliven our current groups and have started some new Soul Matters groups. The transition to Soul Matters has been successful for most groups. Group leaders are getting dedicated support from Rev. Joyce. Other groups have been slower to re-start or start post-covid. Wonderful Wednesday attendance varies, but some programs have been well attended. The Sauk Valley Group is meeting regularly. About 70 people are in a Soul Matters group or other small group; we want to increase that number.

Our goal for 24-25 is simple: fill or sunset the existing groups and start new groups, getting the soul matters attendance up to at least 75 and the total small group membership over 100.

Congregation members can participate by joining a small group!

1A3: Religious Education for children and youth, which supports and engages caregivers and families, demonstrates and encourages radical love, and develops UU spiritual life and values. Building on our strengths in nature-based learning, sexuality education, and justice work – especially including antiracism, anti-oppression and multicultural work--, design and execute an effective and volunteer-efficient plan.

Resources: Consider stipends and partnerships to supplement volunteers and staff. Budget for 3-month sabbatical (not necessarily all at once) for Lindsay Trank (\$5000, saving 2500 a year in 22-23 and allocating 2500 in 23-24).

Timeline: 22-23: Design and implement a plan, in consultation with caregivers, children, youth, and other members of the congregation, to offer religious education given current habits, constraints, and opportunities. Matthew, Lindsay, and Lauren to lead; also to recruit through this process a team to support RE.

23-24: Implement this plan. Manage Lindsay's sabbatical.

24-25: Adjust, improve, and implement the plan.

Success, with adjustments! A plan was created and implemented, and will be entering its second year this coming year. We hired two teachers for 23-24, which helped sustain this program. An RE team has been recruited and will help evaluate the plan and adjust it. Attendance has risen and families value the program and what it offers – and how it respects the complexity and overwhelm of their lives. Lindsay will get some sabbatical time in the 24-25 year. **We do need more volunteers (see below) from the congregation.**

1A4: Create a family camp/conference weekend for regional Unitarian Universalists. We have attempted to promote existing camps, but they are too far away/too long. We will create a weekend camp at a retreat center in Southern Wisconsin or Northern Illinois and invite Unitarian Universalist families from around the region to attend. In the design and program we will be sure to center multicultural families.

Resources: Staff time, and a planning team from the congregation to get started. Though the camp should be self-sufficient, we will want a scholarship fund (which could be the Minister's Discretionary Fund).

Timeline: 22-23. Recruit team, choose location and days, advertise.

23-24: Hold first gathering. Learn from and build on experience.

24-25: Hold second gathering.

I made the executive decision to lay this one aside. We did not have the staff or volunteer capacity to do this. We have been trying to promote other UU camps and conferences and events. **Congregation members are encouraged to attend these if it makes sense for them and to share they are going with others who might join.**

Strategy 1B: We connect more people to worship and programs.

1B1: We use key tools to **spread the word** about activities, events, and our mission within the church and in the wider world. We use social platforms, email, texts, and postal mailings to inform our folks and others about what we are up to and how to get involved, with a focus on our anti-racism, anti-oppression, and multicultural (ARAOMC) programs and outreach to diverse populations.

Resources: Staff time, and a small team of volunteers to make suggestions. Small ad budget for social (already in the budget).

Timeline: Ongoing, with regular review.

Yes. Autumn has posted more to Facebook and Instagram, we've upped our texting capacity, and are doing more to let folks know about us. This is ongoing work, but going well. **Congregation members can help by liking and sharing posts.**

1B2: Members **enthusiastically invite** others to participate in the church. Members are trained and encouraged to invite others to participate – both existing participants to get more involved, and potential newcomers to come for the first time. These invitations will be culturally competent/humble.

Resources: Existing staff time.

Timeline: Ongoing. Hold at least 3 “Bring a Friend” Sundays/year. Write and preach about having a culture of invitation and outreach.

We have encouraged folks to do this with some success. We have more visitors this spring, and word of mouth is the number one way folks hear about us. We have had some bring-a-friend Sundays but need to promote them more in advance. **Congregation members should be making in-person and on-line invitations to others. Share your faith – especially as we approach the election, folks will be looking for what we are doing.**

1B3: Engage more people to participate in **small group ministry**. Start new groups at least 2x/year. Advertise openings and the opportunity to start interest-based groups. Include/support/center participation of Black, Indigenous, and other members and friends of Color.

Resources: Existing staff time. New facilitators.

Timeline: Ongoing, with big push in fall 2022.

See 1A2 above. Starting groups for LGBTQ+ folks and for folks in the Global Majority may be on our agenda. **We hope members who have an interest in a topic or group will be empowered to start them.** See, for example, the non-violent communication practice group, which was organically begun and is being supported.

1B4: Hold 2x/annual “**Engagement Fair**” to encourage joining teams/committees. Teams should use resources from 1C2 to ensure what their work is aligned with our ARAOMC goals.

Resources: Some staff time, leaders to staff tables.

Timeline: Start spring 2022, and continue with October / March? each year.

We are doing this 1x/year with some success. **We want teams to participate and members to sign up at this event.**

Strategy 1C: Lay leaders and members are inspired and equipped to lead these programs.

1C1: Training and support for **small groups leaders**. Assistant minister offers regular support and training to leaders of Touchstones/Covenant groups and other small group ministry programs, and interest-based groups. Intercultural competency/humility and anti-racist leadership is included in this support.

Resources: Existing staff time.

Timeline: Ongoing. Some gatherings, and often one-to-one coaching.

Rev. Joyce is regularly supporting our Soul Matters group leaders and other leaders. I am doing more to support the Faith in Action team leaders. This will continue. **Leaders can reach out for support and advice.**

1C2: Share best practices for **team and committee leaders**, especially about how to welcome and include and to bring anti-racist, multicultural practices into their work. Staff and Board liaisons work with their teams and committees to share these practices and monitor progress, with more direct coaching as needed.

Resources: Existing staff time. Commitment from team and committee leaders.

Timeline: Spring 22: Share best practices with leaders.

Fall 22: Make assessment of each team and committee, with a plan to improve the team’s operations.

Follow through on plan.

Reassess each November.

We’ve created some resources here but need to get it to the leaders regularly. We held a leaders’ happy-hour that did some of this and surfaced some good conversation. We need to reassess our teams and make plans for ongoing work. Making sure that staff know that helping convene teams is part of their work is on the agenda as well. **Team leaders could help by being more proactive about meetings and notes.**

1C3: Substantial focus on recruiting and supporting **volunteers for religious education** for children and youth. The RE staff and the Ministers will encourage, support, recruit, and assist in this work. We’ll consider stipends as needed. Volunteers will be equipped to put our ARAOMC goals into practice.

Resources: Existing staff time. Potential stipends.

Timeline: Beginning spring '22 and ongoing. We want to see a highly robust roster of reliable volunteers by fall '22.

We did use 2 stipends (1 is planned in 24-25) to help scaffold the program back up. There are new volunteers, but not quite enough to provide breathing room for the program. Lindsay is carefully managing this to avoid burnout while meeting our policy as best as possible, but we skate on thin ice if someone cancels or is sick too often. No volunteer need is more stark – and, 3-6 new regulars would meet the need. This work is ongoing, and **something the congregation as a whole and the leaders could play a larger role in as recruiters and encouragers.**

1C4: Encourage participation in **UUA programs for leadership** development. UUA programs now always include an ARAOMC lens. The Denominational Affairs Coordinator and the Senior Minister will share leadership development opportunities with leaders in the church. Scholarships provided from Minister's Discretionary Fund as needed.

Resources: Existing, including continuing to be Fair Share to the UUA.

Timeline: Ongoing.

We have used some UUA programs (such as Centered Leadership) and have encouraged folks to attend UU events, with very modest results. Adapting programs for our internal use seems to work better than encouraging folks to participate in UUA and MidAmerica programs. We are not full share, and will be giving 21K out of approx.. 31K ask this coming year. **More members of the congregation could participate in UUA programs.**

End #2: In our interdependent covenantal congregation, our church is nurtured by our members and our members are nurtured by our church.

Strategy 2A: Our Members are Nurtured by our church

2A1: The **caring team** provides supportive, loving, culturally-competent, and appropriate lay pastoral care to members and friends of the church. They are well-trained and equipped for this ministry.

Resources: Assistant Minister time.

Timeline: Ongoing. Annual trainings offered by Assistant Minister.

Rev. Joyce and the caring team have done very fine work here. Additional training and support has been offered, and folks make regular contact with members in a caring and kind way. **Folks can join the caring team, and also to articulate their needs to Rev. Joyce and the team.**

2A2: We care for, connect, and enrich the lives of our **families with children** (including parents, grandparents, and more). We have social gatherings, resources to support caregivers in their role as religious educators, and offer pastoral and spiritual support to families, especially those with very young children who have experienced so much disruption due to COVID-19. This ministry embodies our ARAOMC commitments.

Resources: Time for RE Staff and ministers, connection with UUA resources, volunteer time to lead social gatherings.

Timeline: Ongoing, and included in RE plan noted above. Restart social gatherings as soon as it is safe to do so.

We have begun to have a few social gatherings again, such as the chili-cookoff. A regular group of families participate in the parents-night-out, which has been an important ministry for that group. We distribute the Soulful Home materials to families, though we're not sure about usage. The RE Team will be working to support more programs for 24-25. **The congregation, especially families with children, can make it a point to attend in the programs we will offer this year.**

2A3: We have strong and theologically-grounded **safety and well-being policies**, and enforce them. This includes policies to support public health, child safety, anti-harassment, right relations, ecological sustainability and anti-racism, disability justice and accessibility, and fair compensation.

Resources: UUA examples, Board time, staff time.

Timeline: Board task force created in '22 to examine, revise, and create policies related to safety and well-being.

We accomplished this goal during the 22-23 church year.

2A4: We grow and strengthen our practices and culture of **belonging and inclusion** as part of our work of becoming a more multicultural, multiracial, and beloved community. This includes genuine accessibility for disabled people, intercultural competency and cultural humility, being a vital Welcoming Congregation, and working for justice, equity, and inclusion in the congregation as well as in the world.

Resources: Ministers, lay-leaders

Timeline: Spring '22: Transform Membership Team into Inclusion Team, which includes AIM (accessibility in ministry), Welcoming (GLBTQ), and BIPOC (Black, Indigenous, and People of Color) focus. Review progress and next steps. At least 2x/year, ministers provide or bring in others to grow cultural competency/humility. Create and conduct annual assessment.

This is ongoing. We did have a workshop with Julica Hermann de la Fuente that was very well attended, and will be moving forward with a "change team" to assess her anti-racism rubric and determine next steps. Work around inclusion ministry is held by the membership team. A robust renewal of the welcoming congregation status may come in the future, as the sex and gender justice team grows its capacity. But this requires much more focus from both ministers and the board. **The congregation can join the relevant faith in action teams, the membership team, and participate in this work. We especially want to see folks with marginalized identities find support and connection.**

2A5: We provide a beautiful and well-cared for **physical place** which nurtures the diverse people who come to the church and use its indoor and outdoor space. We use our property in ways that move us toward being net-zero for carbon and methane emissions, which

are accessible, which support economic and racial justice, and which support the rental income of the church.

Resources: Minister, Office Manager, Members. Income from permanent funds, including some of expected Evelyn and Stuart Johnson Bequest.

Timeline: Spring '22: Research on net-zero gap. Planning begins.

Agreement with Spectrum on long-term land/property use.

Fall 22: Begin implementation. If campaign needed, plan for raising funds. Consider need for staff to support volunteers.

This is well on track. The Stuart and Evelyn Johnson bequest has helped us make key improvements, including the just finished canopy. We are making a custodial change which should help keep things looking good. We have determined that we are net-zero during the spring, summer, and fall, but not with heating costs in the winter. Improvements in that area would require re-ducting parts of the system and remain under consideration. We did reach a new long-term agreement with Spectrum. The next major project is the siding, which may include sealing of window casements, which would help with energy and sustainability. The eco-justice team has had a few restoration days to keep the grounds in shape. **The congregation can help by helping with restoration days, kitchen clean days, and other events. A few new members to the Building and Grounds team would be welcome as well.**

2A6: Staff and lay leaders work to **rebuild and build anew vital community and participation** in a pandemic/post-pandemic world. We reach out to those who have not yet returned, connect with those seeking community, rebuild social connections, and address the trauma, fear, and longings that people are experiencing.

Resources: Staff and lay leadership focus on time, mailings, outreach, etc. Consulting with leadership from UUA or UU resources.

Timeline: Beginning spring 2022 and continuing for years to come. Begin mailings to congregation. Make invitational phone calls in Summer/Fall. Advertise safety measures.

This is happening. Some folks have drifted away for sure, but others have returned. We are more aware of those participating online only and made investments in their experience too. Attendance is up for worship and social hour, and people are making connections. **We encourage the congregation to reach out to folks they haven't seen and encourage them to return.**

Strategy 2B: Our Church is Nurtured by our members

2B1: We cultivate a robust, multicultural culture of **lay ministry, volunteering and leadership**. We continue to train and support leaders, through the Harvest the Power UU leadership development curriculum, and one-on-one coaching, and encouraging volunteerism (see Engagement Fair and RE recruitment, above). We celebrate volunteers and leaders.

Resources: Staff time to lead programs and support. The time and energy of members who volunteer and lead.

Timeline: Ongoing. Plan for Harvest the Power in 23-24.

We used “Centered Leadership” instead of Harvest the Power, with about a dozen participants over the 8 session program. All are involved in leadership in the church, and most are new/younger leaders. We need to work on celebrating our volunteers more and improving pathways to leadership. The staff has agreed to work on a volunteer strategy together – one that would touch on everything from the choir to RE to hospitality to governance. **The congregation can help by volunteering and sharing their insights about that experience.**

2B2: Members offer their generous financial support to the church, through **annual giving, legacy giving, and fundraisers**. An ongoing Generosity Team helps plan the annual campaign, connects with newcomers about giving, and follows up with non-giving members. We talk about giving in culturally competent ways. We regularly promote legacy giving and thank our legacy givers. We run a fun and successful Auction.

Resources: Volunteers on Generosity Team. Minister and Office Manager time to support campaigns. Volunteers to run Auction, Office Manager time to support.

Timeline: Ongoing.

The 2024 annual campaign was a huge success, with a 6.8% increase in giving. We continue to have some households who don’t regularly respond, but things are headed in the right direction. Moving this work to be more shared with the lay leaders will be good going forward. Legacy Giving has, of course, been a success. Our processes are well-in shape. We did have an auction in Fall of ’23 that with good energy that raised most of our budget, but we don’t yet have a sustainable auction team. **The congregation can help by volunteering for the auction, designating the church in their estate plans, and by being generous in annual giving.**

2B3: Financial, Building, and Governance leaders take steps to increase, secure, and support **non-pledge income** which also advances our values, including the Woodsong Nature School, rental income, and the ethical management of our permanent funds. Ethical management includes ARAOMC goals. We seize opportunities to advance our values while funding our mission. Connects with 2A5 above.

Resources: Budget for Woodsong staff and supplies, building utilities and upkeep, time of finance, investment, board, building and grounds, and staff.

Timeline: Ongoing. For 22-23 year and ongoing, increase support for Woodsong staff (including vacation/sick coverage). See if we can come to a long-term agreement with Spectrum School (they have renewed through June 2023).

This has been a major success. Woodsong is going very well; staff sustainability and potential expansion are our next conversations. We have a long-term agreement with Spectrum. **The leaders, especially in finance and building and grounds, can continue to support this work.**

End 3: Accountable to our faith, we act to foster a world of understanding, equity, repair, and solidarity.

Strategy 3A: We inspire and equip each other to act in faithful ways for justice in their personal, volunteer, and/or professional lives.

3A1: We offer strong **training for cultural competency/humility, anti-racism/anti-oppression, and faith-based justice making** as well as resources to our members and friends to resource putting their faith in action (see also, 2A4). We create ways to hold ourselves accountable to our values and expectations for covenantal behavior while doing this work.

Resources: Staff time, guest presenters (some funds).

Timeline: At least 2x/year, if not more.

We have offered a variety of programs, including the Mistakes and Miracles discussion group, the anti-racism cook-book group, and Julica's workshop. Some have been better attended than others. We've also regularly shared ER815 resources. We've had some guest preachers on this topic as well. But there is clearly more opportunity here, and the change team will help us select next steps. **We need the congregation to participate in the trainings that we offer.**

3A2: We **share clearly, often, and effectively about opportunities** to get involved in justice ministries, especially ministries that further our ARAOMC work. This sharing includes testimonials, revamp of website section on this, event invitations, one-to-one outreach, pulpit announcements, and social media sharing.

Resources: Attention from staff and Faith in Action leaders.

Timeline: Ongoing.

We have had the issue/action teams start offering the offertory introduction, which has raised the profile of opportunities. We've had excellent participation at some events, including the housing event, the clinic tour, and Pridefest. There is strong interest from a dedicated group. We want to widen this circle and continue this work. **The congregation can show up at these events as they have been doing and invite others beyond the usual.**

3A3: We hold a **"Nourish + Sustain Circle"** to support those who are doing front-line justice and mercy work. This circle provides pastoral supporting, faith grounding, ARAOMC coaching and networking for those doing this work in our wider community.

Resources: Senior Minister time.

Timeline: Begin in late spring 2022.

This has not happened. Despite the need, neither I nor the leaders seems to have the capacity for this. I think it is worth doing somehow, but not this coming year with my sabbatical. I do think that the centered leadership group met some of this need.

Strategy 3B: In collaboration with community partners, organized teams in the congregation and the ministers of the church expand and nurture the beloved community.

3B1: We successfully implement the new Faith in Action plan, creating **effective “cluster teams” for ecojustice, sexuality and gender justice and racial and economic justice**. These cluster teams have strong, inclusive leaders grounded in faith, and organize effective action efforts in which engage many church members and our partner organizations.

Resources: Staff and volunteer time.

Timeline: Recruit in spring 2022 and begin meetings. Ongoing support and training. Have at least one major action per year in 22-23, per cluster, and two in 23-24.

This is up and running, despite some leadership turnover. Each team is making connections with partners and having regular events. These are not generally “major events” but ongoing opportunities, like Wonderful Wednesdays, to connect, learn, and advocate. **Going forward, we need folks to join these three issue/action teams.**

3B2: As part of our new Faith in Action plan, we create an **Organizing Crew** which will work with our cluster teams and with both Rockford Urban Ministries and the Unitarian Universalist Advocacy Network of Illinois to advance campaigns for faith-based justice.

Resources: Support for Rockford Urban Ministries and the Unitarian Universalist Advocacy Network of Illinois, partially with Philon bequest.

Timeline: Recruit in spring 2022, offering yearly trainings, support at least 5 campaigns in 22-23 and 8 in 23-24.

We started this and did some good work, including making some connections around overdose prevention and legislative advocacy on criminal justice. But the folks recruited were fairly overwhelmed, and we decided to focus on the UU the Vote work. That is just beginning. **Folks can join the new UU the Vote team.**

3B3: The Senior Minister engages strategic efforts to advance our values. Currently, and for the foreseeable future, this is as co-leader of the **Ready to Learn Team**⁶, working to ensure that every young child has a real opportunity to flourish and be loved in our wider community.

Resources: Senior Minister time.

Timeline: Ongoing.

⁶ See <https://alignmentrockford.com/ready-to-learn/>. Ready to Learn is a community collaboration to improve outcomes for young children in Rockford.

I've transitioned from the Ready to Learn team to be a member of the Alignment Rockford Operating Board as well as the Universal Newborn System of Support team; I've also gotten onto the Habitat for Humanity Housing Advocacy Team.