

Lay Leadership Development and Training
 Report of the Architecture Team
 December 15, 2001

The Team: Terry Sweetser (Development Department, Capital Campaign), Marjorie Bowens-Wheatley (Adult Programs Director), David Hubner (Acting Director, Department of the Ministry), Janis Eliot (PNWD, First Unitarian, Portland, OR), Don Skinner (editor, Interconnections), Rod Thompson (District Executive, Ohio Meadville), and Tracey Robinson-Harris (Acting Director, Congregational, District & Extension Services).

1.) Background (adapted from the Staff Strategic Plan 1999-2004):

Over the last 15 plus years, “training” has been the great growth industry for the UUA. At this point, more than any other service, our resources are devoted to offering training to our lay leadership.

Training is offered by continental staff from several departments, by the Field Staff and through District Committees and programs, and by structures outside the UUA such as the Leadership Schools. Trainings are developed by staff and districts and by others organizations such as The Mountain.

Most training offered by UUA staff is designed to provide specific information or competency (such as training for extension ministers or youth advisors) and grows out of one of the existing departmental “silos.” The Field Staff, both by mission and by default, have had responsibility for providing training and consultation in general congregational leadership skills. Much we offer is of high quality. Overall our efforts remain uneven. And Leadership schools have been a primary resource in this area, although the curriculum and structure have centered on personal transformation rather than congregational leadership.

Despite excellent evaluation of training developed and/or led by continental staff, the most consistent congregational lament remains lack of preparation, support and the “burn-out” of lay leaders. Currently training is offered by so many structures, in so many places, with so many specific institutional objectives that it is hard even to comprehend its extent and it is offered with too little concern for consistency, for connection, or for complementarity of skills. The risk is that we worsen the feeling of overwhelm and loose connection to mission and concern for the health of the whole congregation.

Some of the most engaging new approaches to lay leadership development involve a shift from this service being “church work” (in the traditional volunteer recruitment model) to fulfilling ministries (“the work of the church”). Leadership in this lay ministry model emphasizes both vision/mission and the management of congregations as emotional systems.

There is a rich and tested body of knowledge dealing with volunteer recruitment, orientation, management, support and evaluation in the non-profit world. We do not need to reinvent the wheel to support service to the Association and its congregations in ways that will maximize the satisfaction and, indeed, the productivity of those who serve.

We have been through a period of evaluation and stakeholder input, reported on below under the heading Lay Leadership Stakeholders. Out of that work, an Architecture Team (AKA the A Team) was appointed by UUA President John Buehrens. The A Team’s task was to develop an

architecture for a well coordinated, effective and user friendly system for lay leadership development and training within the UUA which will help equip, support and nurture elected and appointed lay leaders in our congregations, building on what we do well.

2.) Summary: lay Leadership Stakeholders gathering in February 2001

Twenty-five persons participated (representing the District Presidents Association, Field Staff, Starr King School for the Ministry, The Mountain, several Leadership Schools, districts and congregations) bringing a wealth of experience and variety of perspectives to the table.

We took a role centered, skills focused approach to our work and

- identified central lay leadership roles (governance, religious education, administration/ membership, committee chair/member)
- identified core leadership competencies needed by our congregational leaders
- assessed what we now offer across the UUA in terms of how competencies are addressed
- identified gaps and issues we face
- identified characteristics of a system for lay leadership development and training.

These things inform the remodeling of a lay leadership development system:

- the knowledge that leadership development and training is spiritual work in religious community
- mechanisms to support leadership development (recruiting, nurturing, transition planning) are critical given the turn over rate in leadership positions and reported experience of burn out.
- maintaining good basic, introductory training (currently an area of strength for us) and developing more opportunities for deepening leadership skills are both important.
- training needs to be offered in a variety in locations, varying in time duration and cost as well as format.
- assessing and using technological resources requires that we weigh goals and objectives against the means of delivery to assure a good fit and the best outcomes for the participants.
- strategic planning is essential– which trainings (content) are offered where (congregation, cluster, district, regional, continental) by whom (local consultant, district consultant, home office staff, outside - meaning non UU - consultant) and how often (annually, twice annually, monthly around the continent, every year in every district, etc.)

These need to be features of a well-coordinated, effective and user-friendly system for lay leadership development and training within the UUA. One metaphor for the role of the Association was “steering” in this work. Steering means:

- Coordinating delivery of training including delivery by departments and districts (The UUA has the “biggest big picture”)
- Developing and maintaining a data base on training opportunities available within the Association at all levels and publish a catalog of same
- Using the UUA's unique perspective on congregational life to guide us in making available training with the breadth/depth/variety needed,
- Developing standards and evaluative/follow up mechanisms for programs and trainers, as well processes for recruiting and training trainers
- Developing a means of accountability to users throughout the system
- Promoting and publicizing, marketing both the need and opportunities for trainings,
- Attending to the work of education, planning, design, trainer training/assignment, quality control,
- Developing a grant/commission program to support development when needed

- Developing a means of recognition of accomplishment by lay leaders. (Someone suggested three levels - glowworm, lightning bug and beacon. ;-)

3.) The Architecture Team – Charge, Mission and Vision, Recommendation

UUA President John Buehrens appointed the Lay Leadership Architecture Team in April 2001. Our charge was to develop an architecture for a well coordinated, effective and user friendly system for lay leadership development and training within the UUA that will help equip, support and nurture elected and appointed lay leaders in our congregations. The architecture will build on what we already do well and will have mechanisms for connection/buy-in among training providers. The team will also identify focus areas for training including those where resource development should be given priority.

Team members were Terry Sweetser (Development Department, Capital Campaign), Marjorie Bowens-Wheatley (Adult Programs Director), David Hubner (Acting Director, Department of the Ministry), Janis Eliot (PNWD, First Unitarian, Portland, OR), Don Skinner (editor, Interconnections), Rod Thompson (District Executive, Ohio Meadville), Tracey Robinson-Harris (Acting Director, Congregational, District & Extension Services). Olga Felton (CMWD, Leadership School) was appointed but was unable to meet with us in person.

We agreed upon this simple statement of mission and vision:

The UUA supports the continuing formation of lay leaders to more effectively serve our pluralistic religious communities in developing their faith and living their missions.

To fulfill this mission we recommend the creation of a UUA Office for Lay Leadership Development with responsibility for implementation of a system for lay leadership development and training.

4.) Recommendation (“Blueprint”) Details:

a.) The Director and Administrator will be hired to begin work in July 2002.

One of the problems with the current architecture is that there is no clear main entrance – either actual or virtual – for Lay Leadership Development. The office (both literally and through its web presence) becomes the main entrance opening into a large foyer with many doors. In the foyer folks will find enough information is available to help folks figure out which door to open or what questions to ask. Beyond the foyer this leadership house has three main areas - professional leadership, lay leadership, shared or team leadership (see diagram) with two of the three areas – lay leadership and shared or team leadership – within the purview of this report.

We imagine a replica of the foyer being available on the web and in a portable version for display at GA and district events.

Before construction of this new entryway and the foyer beyond we recommend a web architect/consultant be identified to work with the Director to ensure that the Office and the full complement of resources are web present and accessible on line.

The system will be user friendly and reflect our principles and sources by moving us beyond individualism and institutional management into shared leadership and vision in religious community.

Our works assumes that congregations benefit when:

- Leadership is discerned, learned, nurtured and supported at all ages and stages of life
- Leaders work effectively together in service of the mission.
- Interdependence, transformation and justice are integral to the work of leaders

This Office will work in partnership UUA home office and district staff.

b.) The first major tasks will be:

Research work as needed to implement the system –

Gather information:

- from other denominations
- training(s) currently available within UU circles (Re-) Evaluate.
- from past experiences/trainings, both participants, leaders

Do market research with our providers and consumers

Hold conversations with UU seminaries

Learn from our work in anti-racism and anti –oppression

Develop a work plan includes web architecture

Creation of an advisory panel to serve from September 2002 – September 2003.

We recommend the panel consist of 7 people. Among them the following categories are represented - congregational leaders of various church sizes, clergy, field staff, vendor, youth, young adult, religious educator, folks with experience in justice work, a representative of the President’s council, at least one panel member having been a member of the Architecture Team. (One person may meet up to three criteria.) The Advisory Panel is charged to assist with implementation of the system, maintain continuity with the Architecture Team, assist with marketing and buy-in, offer advice/input into core curriculum development, assist with the development of mechanisms for feedback/input to system.

Core curriculum development begins as soon as possible.

The Director “names” a development team and works with the Team to crate a curriculum development plan. The 1st Phase of the core curriculum (as defined by the Director with the Team) will be completed by June 2003. The curriculum will be:

- role centered and skill centered resources for individual leaders, teams of leaders, congregations as system
- sequenced and fit with a new credentialing process for lay leaders
- designed to enhance competence in management skills and leadership skills
- flexible, offering options and open to individual interests
- informed by and appropriate to the Association’s perspective and experience in determining what lay leaders need – the system will be proactive.

c.) We are not recommending any resource development be done in advance of implementation of these recommendations. At the same time we emphasize that the core lay leader curriculum is urgently needed to address the fragmentation, inconsistent quality and gaps in skill areas that contribute to the feelings our lay leaders describe as “being ill-prepared” and “burning out.”

d.) Curriculum development (and the overall work of the Office) will build on what the UUA and other providers already do well, learning from them and promoting them to avoid repeating mistakes already made (make new ones instead) and duplication of effort (the system coordinates and does not centralize). (Some examples of things we do well are continental conferences organized by congregational size, Renaissance Modules, the Compensation Consultant program, many district trainings and their use of clusters, teams and consultants, and Interconnections, the on-line/hard copy newsletter for congregational leaders.)

e.) A user friendly system is one that is accessible, adaptable and flexible, with spiritual depth, reflecting our commitment to becoming an anti racist, anti-oppressive multicultural religious institution. Appended to this report are lists developed by the Architecture Team detailing what we understood to be meanings behind the words “user friendly system.”

f.) The system reflects our UU principles and sources by moving us beyond individualism and institutional management into leadership and vision in religious community.

g.) Three assumptions form the foundation for the new system. Congregations benefit when:

- Leadership is discerned, learned, nurtured and supported at all ages and stages of life
- Leaders work effectively together in service of the mission.
- Interdependence, transformation and justice are integral to the work of leaders

h.) Expectations of congregations:

- information on lay leadership development (including this report) will be shared regularly with Board, Staff and Leadership Development Person/Committee in every congregation
- means of valuing and supporting (including budgeting funds for) lay leadership development and training will be part of each congregation’s life including participation in the new recognition and/or credentialing processes
- provide data for the data base maintained by the Office including what the congregation does well in lay leadership development and training
- play an active role in evaluation processes, be active participants in the feedback system
- develop/assign lay leadership development portfolio within the congregation

i.) Standards, Credentialing, Evaluation and Accountability within the system:

- Standards will be developed for a.) trainers, b.) programs, training, workshops, resources that are offered by and/or recommended by the office, c.) the core curriculum. We also recommend being certified to offer Continuing Education Units (CEUs).
- Credentialing for trainers (for certification and re-certification as lay leadership development trainers recognized by the UUA)
- Credentialing process for those lay leaders who wish to follow such a path. (We recommend both a “basic” and “advanced” path.) This is not a “junior” minister program.
- Recognition is an important component of maintaining standards. We recommend developing mechanisms for recognition of leaders, participants, congregations and districts and others who are part of the system.
- Process for evaluation by participants and congregations of programs (for “usefulness/ effectiveness”; criteria/ standards will need to be developed) and of trainers
- One of the purposes of developing these mechanisms and processes is to be explicit about accountability.

j.) External Provider Network:

This Office will build relationships with UUA and non-UUA providers of lay leadership development and training services through marketing (being clear about positive benefits for them in being part of this system) and communication, development of criteria for vendor selection and use. Vendors are also a part of the credentialing processes mentioned above. The Office will also have a role to play in the development of “fee for service” guidelines. All of this will need to be done while attending to the many different providers – one size will not fit all.

k.) Districts/Staff/Pods:

Partnerships within the UUA and with UU providers will be important to the success of the Office and the system itself. These partnerships involve and are not limited to coordination of effort and development of resources, participation in the credentialing and recognition processes, support for the core curriculum. For the system to function it will build on the strengths of these internal partnerships.

Questions to be asked include:

- What is best done by/in districts?
- How can we build and build on the strengths districts have and are developing?
- What does staff best do? Across pods?
- What is best done as congregationally based training?
- Who/where is the most effective point of first contact and for what?
- What will partnerships between UU providers such as UUMA, LREDA, Leadership Schools, UU camps and conferences and this office look like?

l.) Funding/Grants/Costs/Fees:

- Resource development grants
- Subsidies/financial support
- Financial assistance for participants

m.) Marketing/PR:

- On line access – web links abound, can find the system using a search engine, informational literature and lay leadership resources available on line, a portable portal/foyer that responds to the user
- Recognition and credentialing as marketing tools
- Support from the Davidoff Fund
- Virtual “house calls” and lay leadership “tech support”
- Marketing within congregations by lay leaders
- Print marketing

n.) Data/Resources

- The web and the role of a web architect are crucial
- We have an abundance of resources and of sources. We need to organize them for maximum useful access and continue enriching them.
- We need to gather data from “previous” trainings and the previously trained
- We want to offer access to non-UUA providers
- We will use links and email lists to connect, communicate and market – to reach trainees, trainers, to identify program sites, to connect with the markets for our programs.

o.) Location for components of system

- Staff-office can be anywhere in the US-strategically located in an “underserved” area with lots of UUs
- Consider advantages of Boston based staff
- Links to district can expand sense of location

p.) Outside expertise

- Web architecture (Can we buy it from someplace/someone who’s already done it? The Evangelical Lutheran Church in America has a good system.)
- Marketing expertise – Design of materials, etc.
- Research/library skills
- Legal advice

q.) Cooperation and buy-in: This process will not be completed before implementation and will be on going. The 1st step with vendors is to share information about the system. This process requires that the Director and Advisory Panel be prepared to field questions that ask “have you thought about _____?”

Partners:

President’s Council	District Presidents/Districts/
Field Staff	Board (invite tough questions re report)
Leadership schools	Camps/conferences
Theological Schools	Private consultants
Staff (UUA)	Congregational leaders
UUMA	LREDA
Other professional staff	

r.) Force field analysis: what are the forces working with us and working against us as we make this change?

Positive forces for change include:

- Perceived needs
- Positive experience with training in UUA
- Liking and wanting practical advice from InterConnections
- Money in hand and more on the way
- Embracing shared ministry
- The Davidoffs
- Strong lay leadership is high on ministers’ lists of what is needed for healthy congregations.
- Requests for quality
- Value of standardized resources
- We are in a time of change (including impacts of 9/11), a time of cultural change

Negative forces against change:

- We are in a time of change (including impacts of 9/11), a time of cultural change
- Some ministers see high quality lay leaders as “competition”
- Turf battles
- Inertia
- Our anti-authoritarian streak will respond “This is too top down!”
- Negative experiences and lack of experience with training by the UUA leading to the assumption that “UUA never gets it right.”
- Costs more

- Time constraints
- Lack of models to look at
- Folks don't understand value of specialized training, focus on religious community
- Fear of change
- Fragmentation
- Isolation

Funding

Year 1 Costs: \$250,000

- Office set up/Director/Administrator
- Research work/communication as needed to implement the system and develop relationships
- Initial web architecture
- Creation of an advisory panel to serve from September 2002 – September 2003.
- Core curriculum development begins as soon as possible after Director is hired.
- Begin work on credentialing, standardization, evaluation, etc.
- Determine steps for years 2 and 3

Year 2 Costs: \$ 200,000

- Office/Director/Administrator
- Research work to maintain system/components
- Core curriculum launch
- Recognition and credentialing processes
- Other work as determined by Advisory Panel, Director and as needed

Funding considerations:

Uses of Davidoff Fund (front load unrestricted)

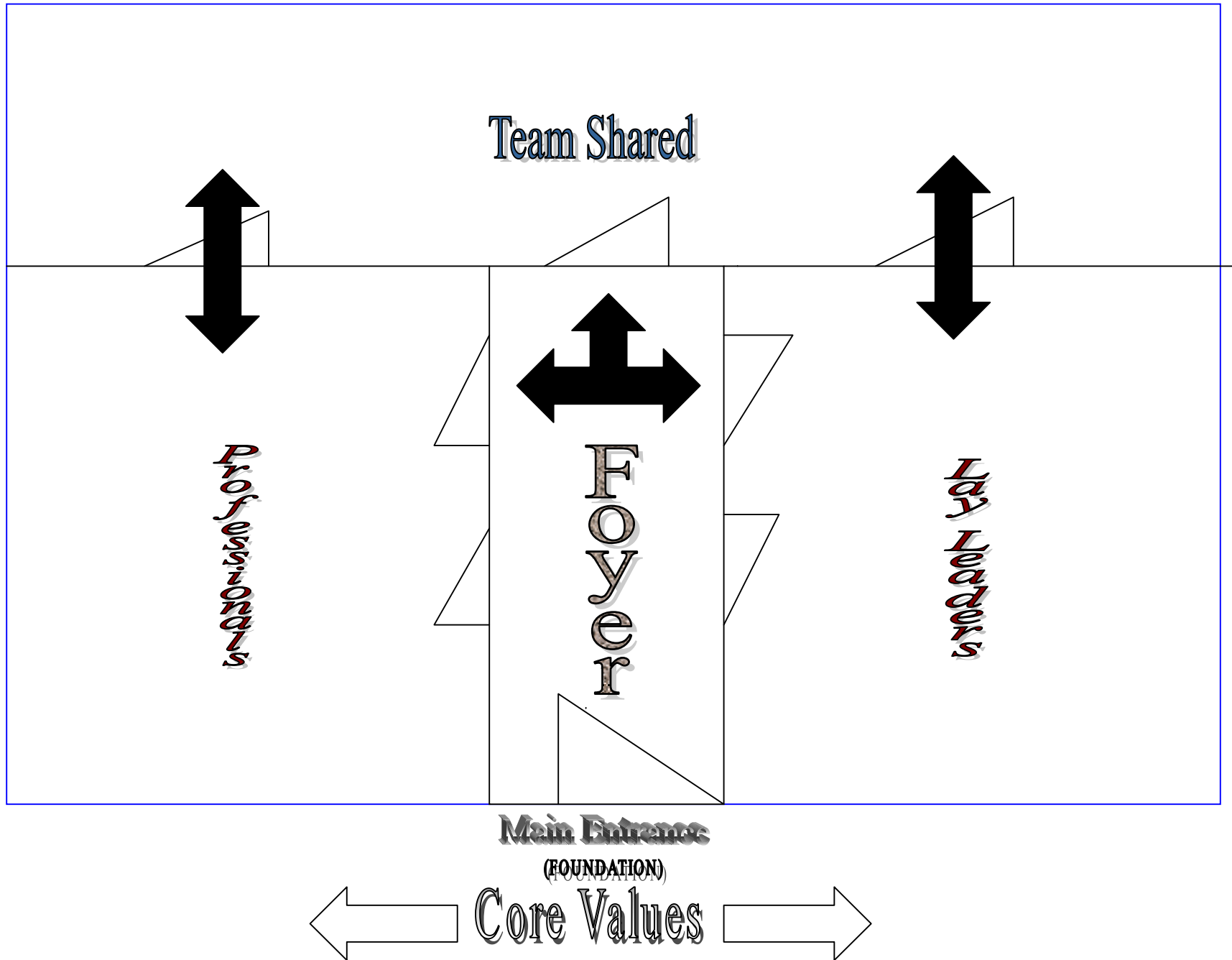
Plan phase in of aspects of system to operating budget

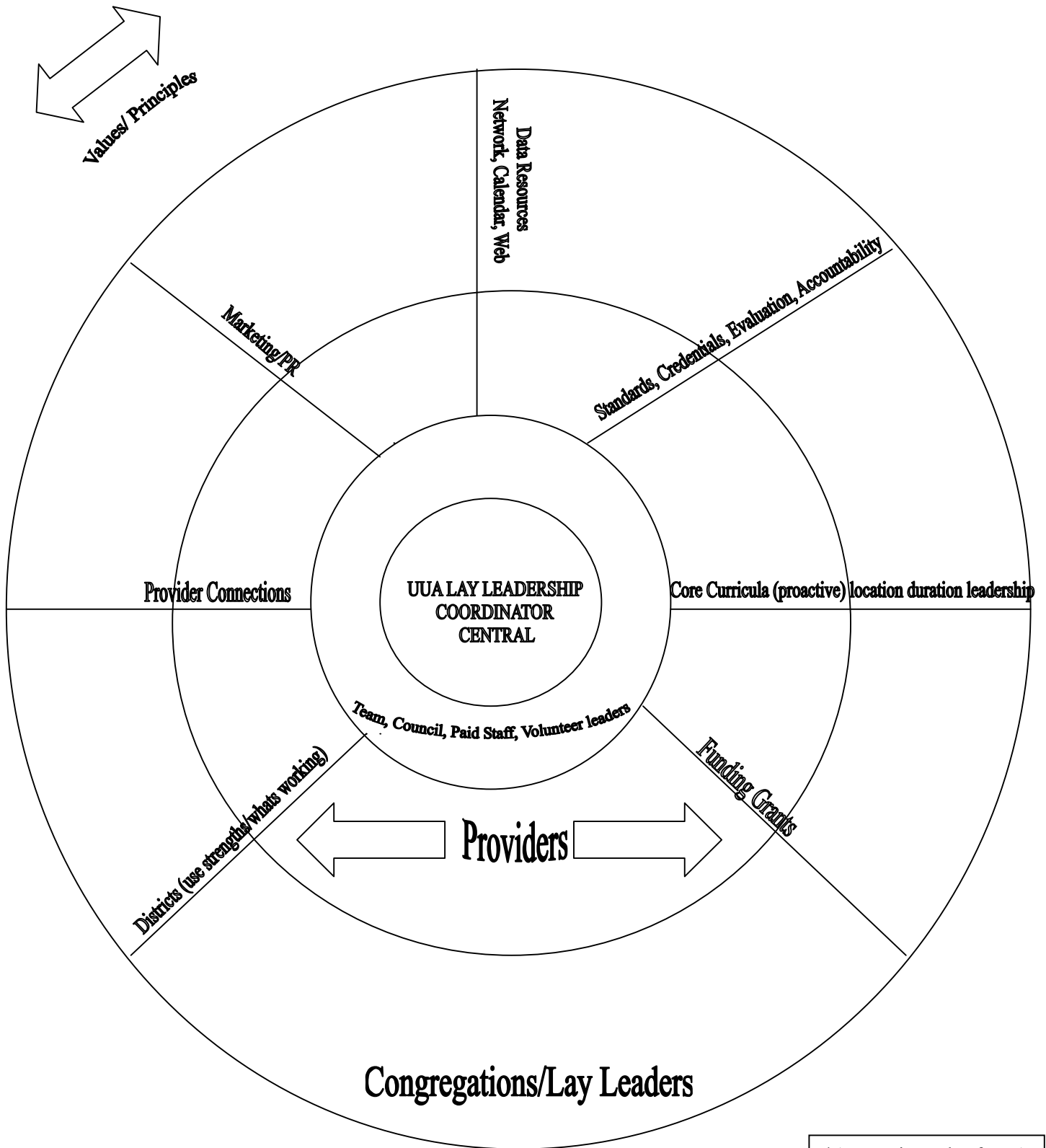
Determine reliance on fee for service in this system

Consider development of mixed funding streams for resources/training

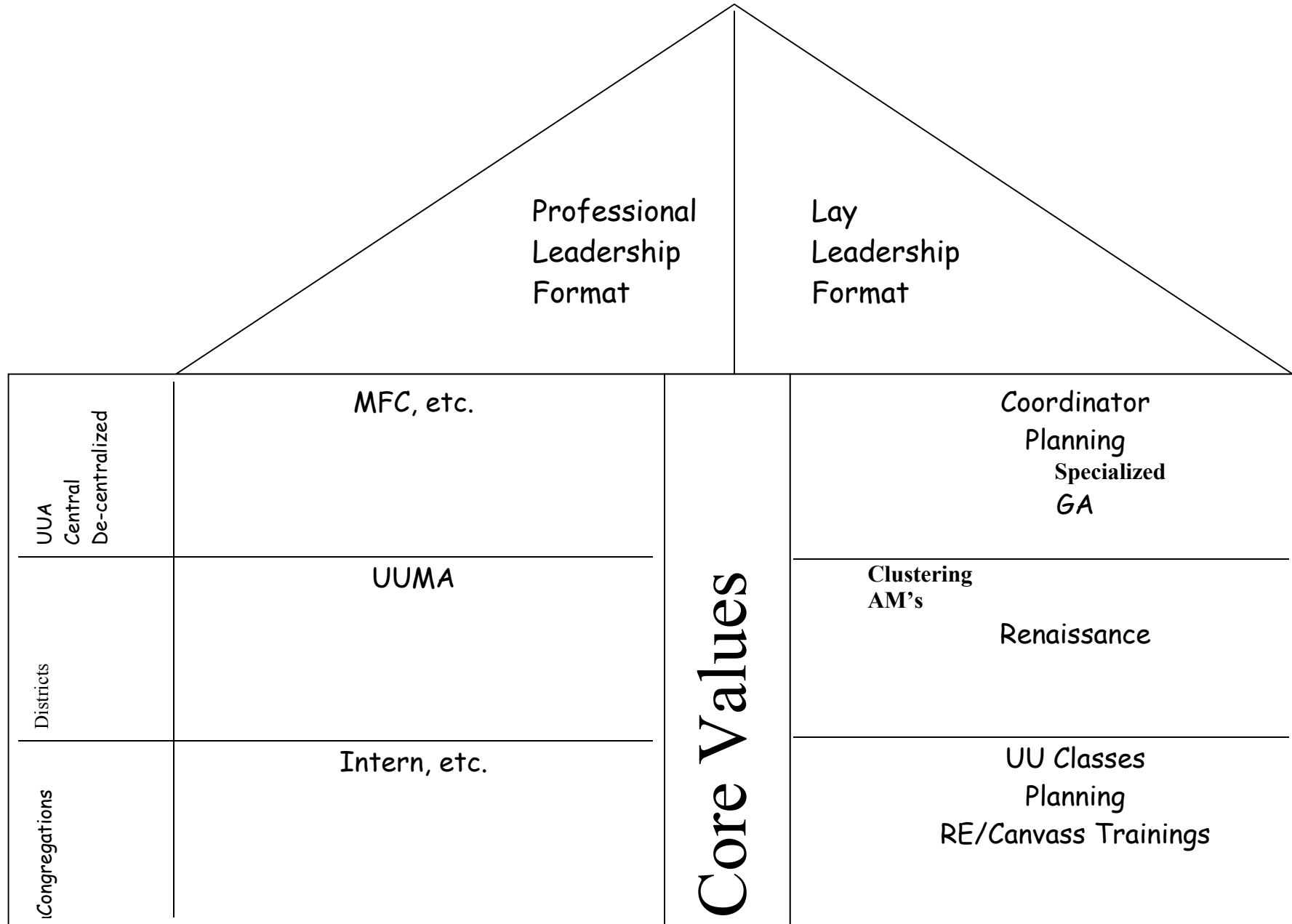
Funding plan must avoid "means test" for access

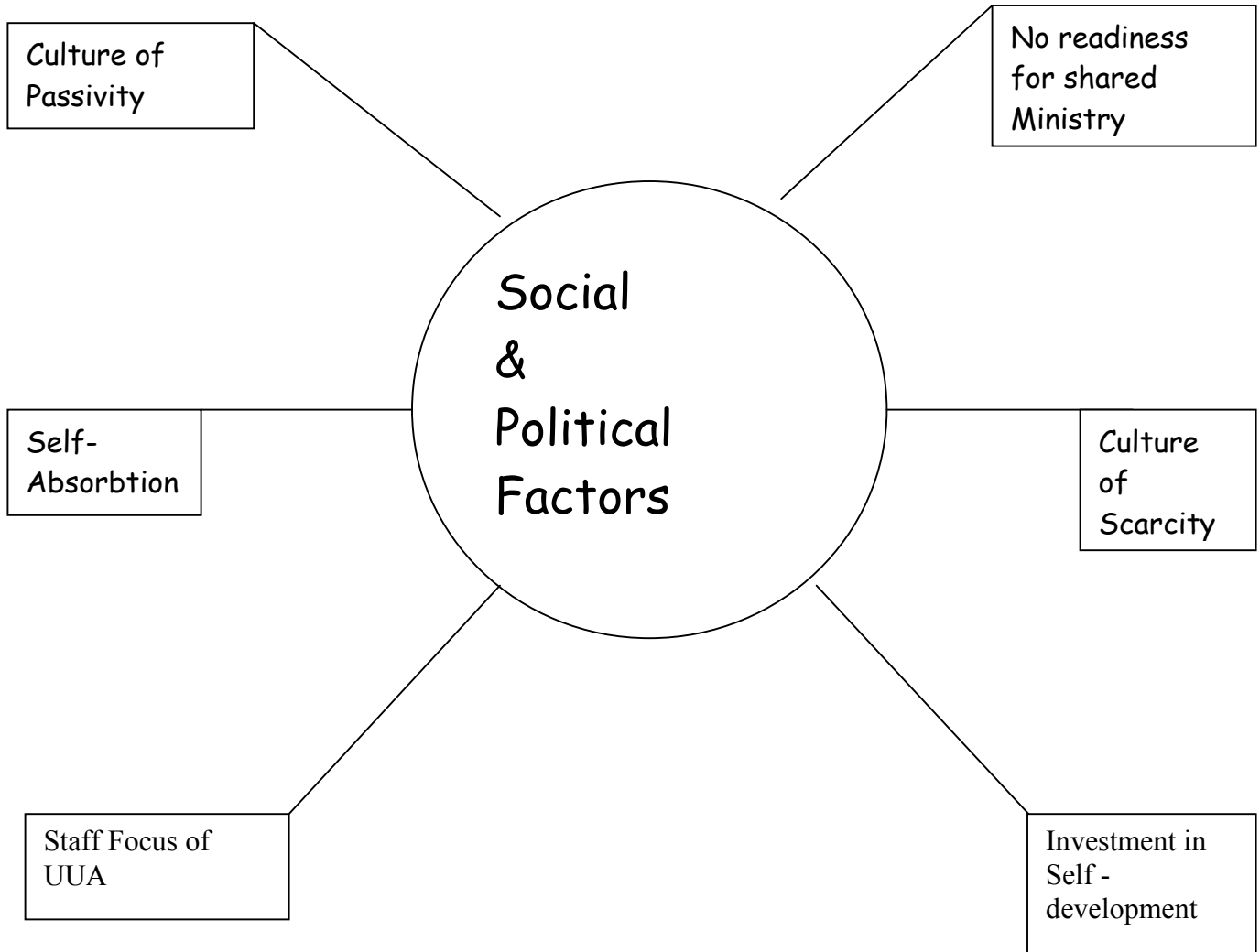
Encourage congregations to build lay leadership development into their budgets/financial plans





*Appropriate role of UUA
big picture
broad reach
wide experience





Skills

Essential Skills	Work Content Skills	Self Management Skills	Transferable Skills		
Communication Assertiveness Delegation Practicality Risk-taking Team play Diagnosing Evaluation Clarity of Roles Marketing Collaboration Lack of Arrogance Conflict Management	Accounting Budgeting Logistics Theology Human resources Engineering Occupational Dev. Computing Teaching Tailoring Plumbing Religious education Preaching Investment Journalism Maintenance Fundraising Grant making Grant giving Community organizing Pastoral care public witness	Risk-taking Reliability Follow-through Punctuality Self confidence Self awareness Self control Listening skills Honesty Assertiveness Practicality Good communication Inspirational Good temperament Manage ambiguity Flexibility Cooperative Thorough Responsive Strive for excellence Proactive Locationability Manage boundaries Language skills Congruency Adaptability	<u>People</u> Listening Empowerment Humor Empathy Limit setting Trust building Conflict Manag. Flexibility Team building Honesty Managing Supervising Directing Leading Appreciating Feedback Mutuality Persuading covenanting	<u>Things</u> Organizing Setting up Manipulating Diagnosing Acquiring Inventory Repairing Adapting Preparing “Satisficing” Computing Ease w/ technical devices	<u>Information</u> Summarizing Research Reading the Directions Prioritizing Analysis Synthesizing Reporting Presenting Sorting Selecting Evaluating