

**UPDATE FROM THE  
CONGREGATIONS COME FIRST TASKFORCE  
5-18-07**

**INTRODUCTION AND THANK YOU**

At its February 22-25, 2007 meeting the *Congregations Come First* (CCF) team expressed its gratitude to its partner groups and others for their thoughtful feedback. Each of the districts' partner group representatives held conversations, either by phone or in person regarding their impressions of the CCF presentation offered in the fall of 2006. We spent much of the February weekend reviewing and discussing the more than 44 pages of comments and suggestions that we received.

The CCF team wants you to know that you have been heard! You offered much positive and negative feedback on the concepts we explored, and we were encouraged that our work inspired district leaders to consider new ways to work together. Thank you again for taking the time to share your comments, concerns and suggestions.

One of the first things we did after processing what we had read and heard was look at our purposes and adjust them to reflect some of our new thinking. These revisions appear later in this document in our Executive Summary and also on the CCF website. We also decided to continue at a slower pace with a new timeline. We had originally planned to report to the UUA board in January 2008, but have decided to delay that report until January 2009. We decided to explore some new, non-geographic alternatives for congregation support based on 21<sup>st</sup> century technology. We will further examine transition and change theory, as well as how other denominations are facing the challenge of distance, relationships, and providing congregational support.

This status update reflects our revised understanding informed by feedback from the partner groups. The materials here represent work in progress and not new or different concepts. At its next meeting May 17-20 the team will examine transition and change theory.

We continue to encourage feedback from our partner groups. Besides meeting in May, 2007, the CCF team will meet again November 4-7, 2007 and January 24-27, 2008.

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**CONGREGATIONS COME FIRST INITIATIVE**  
**A Taskforce of the UUA Moderator**  
**EXECUTIVE SUMMARY (revised 2/2007)**

**TEAM:** *Congregations Come First (CCF)* is a partnership created by the UUA Moderator. The partner groups are the Annual Program Fund Committee, District Presidents Association, UUA District Staff, and UUA Board of Trustees. The team subsequently chose to add a representative of the UUA administration and two parish ministers.

**PURPOSE:** To imagine how to more effectively and equitably deploy the resources of the Association (including UUA resources and district resources) to support congregations living their missions covenantally, in Association.

**GOALS:** To recommend systemic changes and to influence culture and practices that will ensure a more equitable and effective allocation of resources for service and support of our congregations and their missions, including:

- More equitable distribution of resources
- Unified collection of funds from congregations
- Structures and approaches to provide existing and emerging congregations more effective support for their health, vitality, and growth
- Actualization of the true meaning of our covenantal relationship through
  - Increased connectedness among congregations
  - Increased congregational participation in the life of the Association

Some initiatives aimed at certain aspects of these goals are already happening. This CCF status report highlights a few examples.

**REPORTING RELATIONSHIP:** The team will report to the partners listed above as well as other groups. Information will be available on the website.

**BACKGROUND:** At various times the District Presidents Association, the UUA Board of Trustees, district staff members, and others have explored inequities in the system that are believed to interfere unnecessarily with congregational health and vitality. Each time the individual efforts to correct these inequities have come to naught because the systemic issues could not be addressed. This team is taking a larger systems approach to address the inequities, inefficiencies, and bureaucracies that impede service and support of congregations.

**CURRENT TEAM MEMBERS:** Elected and appointed lay leaders, religious professionals, UUA Moderator, and UUA staff.

- Co-Conveners of the CCF Team - Gini Courter, Moderator of the UUA Board of Trustees and Director for District Services The Rev. Harlan Limpert
- Representing the District Presidents Association (DPA)—Elyse Reznick and Joe Sullivan
- Representing the UUA Board of Trustees—David Friedman and Roger Comstock
- Representing the Annual Program Fund (APF)—Laurel Amabile and Barb Brown
- Representing the district staff—District Executives The Rev. Bill Zelazny and Nancy Heege
- Parish ministers—The Rev. Mark Gallagher and The Rev. Gary Smith
- Representing UUA administration—The Rev. Dr. Stephan Papa
- Notetaker— Eva Marx, member of the UUA Board of Trustees

**WHAT YOU CAN DO:** Visit our website at <http://www.uua.org/administration/committees/ccf/index.html>.

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## **Congregations Come First (CCF) Team Frequently Asked Questions (FAQs)**

**Q: What is the purpose of the Congregations Come First team?**

A: (From the CCF Executive Summary), it is to " imagine how to more effectively and equitably deploy the resources of the Association (including UUA resources and district resources) to support congregations living their missions covenantally, in Association."

**Q: Is the CCF team a task force of the UUA Board of Trustees?**

A: No. The bylaws of the Association allow the moderator to create task forces. In the case of CCF, Gini Courter, the UUA moderator, established the CCF team as a partnership of groups and individuals who represent our congregations from a spectrum of leadership perspectives and care deeply about the mission and purpose of the Association.

**Q: What led the moderator to create the CCF team?**

A: The ideas that led to the CCF team originated as a result of Summits, hosted by the District Presidents Association in 2004 and 2005, to discuss institutional challenges. At the end of the 2005 Summit, representatives of the DPA, Annual Program Fund Committee, UUA district staff and UUA Board agreed that it was time to charge a taskforce to study these challenges.

**Q: Were the ideas the CCF Team presented in the fall of 2007 specific recommendations?**

A: No. They were concepts the team believed systematically addressed the CCF purpose, goals and underlying values. They were intended to stimulate broader conversation, which they did.

**Q: Is the CCF Team recommending staffing changes for the Association?**

A: The CCF Task Force may propose concepts that have staffing implications, but the determination of appropriate staffing is the responsibility of the UUA President and Administration. However, any consideration of changes to the staffing structure would need to be informed by the thinking of key leadership groups in the Association - district presidents, UUA board members, district staff members, national staff members, religious professionals serving our congregations, and others. The conversations inspired by the CCF task force have been doing just that.

**Q: What was the outcome of the February 2007 CCF meeting that followed the conversations in the districts among representatives of the partner groups?**

A: 1) The CCF Team will seek examples and ideas of how services and ministry to congregations can be more effectively provided.

2) In addition to thinking geographically (in terms of either districts or regions) the CCF Team will explore non-geographic networking modes of support and service delivery. We believe that networks of various types represent an important concept to explore in consideration of the CCF's purpose and goals.

3) It was widely believed that the concept of "congregations canvassing congregations" was not without value, but requires a foundation of strong relationships between congregations. The CCF Team will continue exploring concepts centered on relationships between congregations with the vision that someday congregations will more fully realize the potential of our covenants.

4) The CCF Team will make recommendations to the UUA Board of Trustees in January 2009 rather than in January 2008.

## **Certain values and desired outcomes underpin the work of Congregations Come First:**

### **VALUES**

**Right Relationship**: In accord with our covenant, the system should promote right relationship through funding and resource allocation. Cumbersome, commercial, and divisive characteristics of the present multi-sourced national and district systems strain relationships.

**Trust**: "Assume good intentions." The members of the CCF team and those reviewing the ideas and recommendations will assume that the intentions of all are good and that we are working collaboratively to address the challenges of sharing the principles and purposes of the Unitarian Universalist Association.

**Equitable**: Access to services and allocation of resources in support of congregational health and vitality should be more equitable. Congregations should not be advantaged or disadvantaged by location. Legacy district characteristics need to be considered.

**Openness**: Funding and resource allocation systems should be open and easily comprehensible.

**Quality & Timeliness**: High quality specialized services should be directed in a timely fashion to where they can have the greatest impact on congregational health and vitality.

**Spirit of Generosity / Stewardship**: The system should encourage our most generous spirit of faithful stewardship rather than compliance or avoidance.

**Connection**: In accord with our covenant of mutual support among congregations, the system should support meaningful connections in both the funding process and healthy congregation services delivery (e.g., church-to-church mentorship and peer support).

**Capacity:** The system should develop a greater capacity to serve congregational health and vitality by expanding meaningful opportunities for UU's to apply their leadership talents and passion beyond their own congregation.

**Accountability:** Current multi-sourced (district and association-wide) and cumbersome funding and resource allocation systems hinder accountability.

**Innovation & Entrepreneurship:** The system should encourage and support innovation at the local (congregation, cluster, region) level.

### **DESIRED OUTCOMES**

Increasingly healthy UU congregations in deepening connections of inspiration and support providing vital service to their members, communities and the world.

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### **UNDERSTANDINGS THAT INFORM THE CONGREGATIONS COME FIRST TEAM (CCF) DELIBERATIONS**

- The UUA method of funding districts is inequitable and therefore inappropriate.
- The formula for sharing district staff costs is complicated and cumbersome.
- In many instances a specialized consultant can be more helpful to a congregation than a generalist.
- Access to specialized congregational services is inequitable.
- Quick, easy personal connection to district staff members is desirable.
- The patterns of functioning of pastoral-size organizations are not the only ways to effectively sustain and serve congregations.

- Every congregation ought to have access to certain "core" services simply because it is a member of the Association.
- A situation where some districts can afford multiple staff members and others can barely afford one is inappropriate.
- Changes in priorities and service delivery would enable us to grow more effectively.
- CCF concepts are not intended to reduce costs but rather to use existing resources more effectively in support of the larger purposes of the Association of congregations.
- New proposals will not appreciably exceed current combined district and Association expenditures.
- We are a "covenantal faith" - or ought to be. Strengthening our covenantal basis will lead us to more effective pursuit of the purposes of our Association.
- Multiple funding systems confound equitable funding and strain relationships.
- A system that appears to be a "pay-for-service" mechanism undermines our sense of covenant.
- There is competition between congregations, districts, and the larger Association for a number of dollars perceived to be finite.
- Change should be carefully planned. Where new relationships are envisioned, participants should have the opportunity to get to know one another.

## **Funding Our Association -- Reflections on comments from partner groups**

The Congregations Come First Team has learned that there is interest in pursuing a plan for a more unified funding stream by which congregations make a single contribution to the Annual Program Fund rather than to both their district and APF. This would require a new means of calculating and dispersing the funds in keeping with other systemic changes being considered.

The CCF team clearly heard the grave reservations expressed regarding the logistical challenges and financial risks associated with the concept of congregation-to-congregation canvassing, especially if implemented as a large-scale, sudden change to a yet untested method. Feedback suggests that congregation-to-congregation canvassing, if ever attempted, would require building relationships over a number of years. We agree. A major change of this sort, however, could presumably be field-tested on a small scale.

We believe that cultivating more relational stewardship practices among our member congregations is consistent with our Unitarian Universalist identity and values. We hope that there can be further exploration of the relational and covenantal elements of congregational support for our Association. Such exploration could lead to innovations that inspire generosity in our congregations at levels yet to be experienced.

None of this assumes the elimination of the Annual Program Fund. Congregations must be kept informed of the funding needs of the UUA as well as provided the resources to assist them and encourage them in their stewardship efforts.

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## **Exemplary Stories of Collaboration**

There are a growing number of examples of collaboration that address issues being studied by the CCF team. Here are some stories:

### **New Hampshire/Vermont and Northeast Districts' Consolidation**

On April 28, 2007 the delegates of the Northeast District of the UUA voted to begin a consolidation with the New Hampshire/Vermont District. NH-VT District delegates had voted in favor of the same action two weeks earlier. Five years in the making, the primary goal is to provide expanded services to congregations in the new consolidated district. The official consolidation will occur on July 1, 2008.

This major transition has gone well in large part due to the planning and taking time to "get to know each other".

### **Prairie Star District**

With financial support from the UUA and assistance from the Prairie Star District Executive, a local planning committee led a nine-month series of conversations for leaders from Twin Cities' larger UU congregations. This led to a program called Faithful Conversations, which brings together participants from four large congregations to discuss theological perspectives with six UU ministers.

The Southern Cluster OutReach and Extension ministry program [SCORE] engages seven UU congregations in Kansas and Missouri in several projects - consultation for small and emerging congregations by a senior seminary student, a monthly lunch for congregation presidents, an I-70 choir for special occasions, and more. Funds have been provided by the Fund for Unitarian Universalism, Prairie Star District (PSD), Chalice Lighter program of PSD, individual UUs, and contributing sponsoring congregations. Several ministers and key lay leaders of the congregations conceived the program and continue to provide leadership.

### **New England Area**

The five districts in the Northeast (New England) are developing plans for a regional response to disasters. This will include establishing a unified training and education program, a single point office (command center) for communications and coordination, and regional connection to civil and other non-profit disaster responders.

The five districts in the Northeast (New England) will hold a joint regional leadership conference in October 2007.

### **Ballou Channing and Mass Bay Districts**

Ballou Channing District (BCD) and Mass Bay District (MBD) are having an initial discussion about bi-employment of several district program staff, expanding present MBD-developed leadership training and workshops into the BCD and possibly realigning or sharing district executives' consulting and training functions.

Congregation presidents south of Boston have been meeting regularly for more than three years for mutual support and sharing. They have invited ministers to discuss areas for potential collaboration. One of these meetings, in which youth and directors of religious education also participated, explored ideas for joint youth activities.

Congregation presidents on the Cape and Islands in the Ballou Channing District have been meeting regularly for several years and have formed a separate Growth Council that has worked collaboratively to develop growth strategies and support advertisements in local media.

### **A New Four District Collaboration**

Joseph Priestley, Metro New York, Ohio Meadville and St. Lawrence Districts are currently participating in an experiment whereby current co-employed UUA/District Staff members have become a shared team, with a coordinator appointed from among the current staff. The Districts and the UUA have entered into an expanded partnership to address underserved areas for congregations on a regional basis.

The purpose is to create healthy, vital and growing congregations in the four districts by creating an infrastructure that allows expansion of capacity beyond existing staff configurations. We have seen a direct relationship between staffing and effective delivery of services; this joint effort will make it possible for us to develop transformative programming initiatives in areas such as youth emergence, shared congregational ministry, and

information technology. It will allow us to strengthen service to congregations in specialized areas, consider strategies for churches based on size or physical environment, and bring their leaders together for shared training, networking, and support. A shared lay and clergy conflict management team whose members would serve in districts other than their own and more opportunities for congregations to connect for mutual support and sharing are other expected outcomes.

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As we continue our explorations, we are actively seeking other examples of initiatives that address the CCF Team's purposes or goals. Please send your thoughts or stories to [ccf@uua.org](mailto:ccf@uua.org).