

**Report to the UUA Board of Trustees
for its October 2007 Meeting
from the
UUA Ministry and Professional Leadership Staff Group**

**Office of the Director of MPL
Beth Miller, A'Llyn Ettien**

**Ministerial Credentialing
David Pettee, Christine May, Mohammed El-Khatib, Kim Wilson**

Regional Sub-Committees on Candidacy

The significant developments with the Regional Sub-Committees on Candidacy involve the upcoming turnover of all the remaining members who founded the four RSCCs, and the decision to have all RSCC administrators become part-time unbenefited UUA employees, which will deepen accountability and consistency of professional practice.

Anti-Racism, Anti-Oppression and Multiculturalism

As a member of the Diversity of Ministry Team (DOMT) I continue to work with the DOMT to further flesh out the Ministers of Color plan presented by Bill Sinkford to the UUA Board at the January 2007 meeting. I will continue to serve on the Board of the Religious Coalition for the Freedom to Marry despite the successful effort to defeat a constitutional amendment to ban gay marriage in Massachusetts.

On a personal note, following my trip to Africa in the footsteps of an ancestor who was active in the transatlantic slave trade, in July, I successfully made contact and visited with a descendant of an African man who had been enslaved by my family. Our respective families will be gathering in November to continue the conversation about the implications of this 'border crossing.'

Internship Clearinghouse

Last year, an important goal of the Internship Clearinghouse was to offer greater support to internship supervisors. Supervisors expressed interest in an e-mail list-serve, which is now up and running. With excellent leadership provided by Patti Lawrence, Nan Hobart; Jory Agate, Beth Banks and David Sammons, the ICC offered a training session before Ministry Days. The response to the training was very positive and we are already making plans to offer it again next year with UUMA joint sponsorship. The ICC also offered a workshop, "Can I be a Supervisor?" inviting seasoned supervisors to discuss their supervisory styles. At GA, Patti Lawrence, Nan Hobart and Kim Wilson once again co- led a GA workshop, "Becoming a Teaching Congregation," which was well-attended.

There are currently 71 interns either beginning their internships or continuing part-time positions this fall, up about 13% from last year. Typically, we have more interns than sites. For the first time, we had a significant number of sites that either received no applications or did not find a suitable intern. Whether this is an anomaly or a new pattern, time will tell. The Internship Clearinghouse was also awarded \$5000 by the St. Lawrence Foundation to support a community-based internship. We are narrowing down possible candidates to receive these funds.

Religious Education Credentialing

Beth Williams, Paula Welling

Religious Education Credentialing Program

There are currently fifty active participants in the program: 20 seeking Masters Level, 23 seeking Credentialed Level, and seven seeking Associate Level. The total of credentialed religious educators at all levels is 39. Three applicants were accepted into the program, one participant was put on inactive participant status, and three participants withdrew from the program.

Religious Education Credentialing Committee - Report

The Religious Education Credentialing Committee is preparing for the second of its two meetings this calendar year. We will be gathering in San Antonio, Texas, on October 7. We anticipate meeting with five candidates. Also during this meeting we will greet our new Liaison from the Board of Trustees, Rev. Will Saunders. We look forward to getting to know him, and to his insights into our work.

RECC Committee members participated in two workshop opportunities at General Assembly. During the LREDA Professional Days, we presented a workshop on Credentialing as formation. This was the most highly attended workshop during professional days. During General Assembly itself, the committee used its workshop to reach out to congregational leaders. Our offering “The Lay Leader’s Guide to RE Excellence” was designed to help congregations explore how the process of credentialing, and having a credentialed religious educator can help strengthen and grow their religious education programs and congregations.

The Committee continues to work on a competency continuum document that will assist participants to clearly understand the scope of skills and knowledge in each of the competency areas expected for each level of credentialing. The committee worked on this document during our last meeting and has continued that work by E-mail and phone conference since that time.

At our last meeting we reviewed the results of the first outcomes assessment survey by the committee. The survey was conducted as a report to the Veatch foundation. Both the religious educators who were credentialed and the leadership of their congregations were surveyed to obtain a picture of the ways credentialing has affected both the professional and the congregation. The committee feels that we will learn more about the real, long

term results of credentialing through a process of regular surveys. Participants who receive a credential and their congregations will be surveyed one year after receiving their credential. A survey of all those who have received a credential will reoccur every three to five years so that we can begin to obtain a picture of the long term impact of the credentialing process. A copy of the assessment survey is attached to this report.

The October meeting will be my last as the chair and a member of the committee. I wish to thank the Board for appointing me to this position. It has been my honor to serve in this position during this important time in the role of religious educators in our Association.

Respectfully Submitted,
Liz Jones
Chair, RECC

Religious Education Credentialing Program
Assessment of Outcomes – February 2007

Credentialed Religious Educators and key leaders within their congregations/organizations were surveyed over the last eight months to quantify outcomes and assess the effectiveness of the credentialing program. This assessment will be ongoing. Newly credentialed religious educators will be surveyed a year after being credentialed. All credentialed religious educators will be surveyed every two to three years to provide ongoing longitudinal data. It is likely that there will be a tipping point within the UUA when the cumulative outcomes of the credentialing program will begin to have a systemic effect on the field of religious education, especially among mid-size and large churches. While we can't predetermine that point, we believe that an auspicious milestone will occur when 100 credentialed religious educators are active in the field.

The primary goal of the program is for a majority of religious educators working in positions that are half-time or greater to become credentialed. The desired outcomes and the assessment of those outcomes are as follows:

1. Increase in professionalism and sense of professionalism among credentialed Directors of Religious Education (DRE) as well as the further professionalization of the field of religious education.
 - This outcome is significant because religious educators have struggled with the issue of professionalism. If they are unable to validate this internally, they often will not experience external validation. The credentialing process is, in itself, a powerful external validation that is visible within congregations/organizations and among colleagues.
 - 96% of credentialed Religious Educator respondents reported a reinforced or increased sense of professionalism through their completion of the credentialing process.
 - 71% of congregational respondents indicated a strengthened sense of professionalism in the credentialed religious educator, while 53% indicating significant strengthening.

- Anecdotally, credentialed religious educators have reported that the credentialing process strengthened their sense of professionalism through the process of organizing and assembling their portfolio. This required that they document all of their relevant education training, reflect on its impact on their work, and choose representative work products that flowed from both the training and the experience in their position. The compilation of the portfolio provided objective evidence to them of their competence.
2. Increase in the length of tenure by credentialed DREs in local congregations.
- Religious education in many of our congregations is negatively impacted by turnover in the position of religious educator. While we do not have good data to quantify the tenure of religious educators, there is a considered opinion that the average tenure is five years or less. The decision to enter the credentialing process in and of itself favors increased tenure because of the time to complete the process as well as the commitment involved on the part of the religious educator and the congregation. We expect the tenure of credentialed religious educators to be longer, which the results of our survey confirm. Over time, we expect the average tenure of credentialed religious educators to increase.
 - The average length of tenure of a credentialed religious educator with a single congregation is 9.5 years.
 - 30% of credentialed religious educator respondents reported that their employment changed in some way after being credentialed, mostly in increased salary or increased hours.
 - 96% of respondents indicated that they were still working in the field of religious education after being credentialed.
3. Increase in the quality of (and then the enrollment in) RE programs in local congregations led by credentialed DREs (and growth in adult membership as churches become more vital).
- Religious education is just one component in the growth in vitality of a congregation, but it is considered to be one of the more significant components. A recent analysis conducted by one member of the UUA RE Credentialing Committee focused on the most dynamic religious education programs in large UU churches. It revealed that the number of children and youth as a percentage of the entire congregation (children and adults combined) ranged from 30% to 38% in those congregations. In some large congregations the percentage was as low as 16.4%. While this is influenced by the demographics of the community on which a congregation draws, there is no doubt that strong RE programs impact the demographics within a congregation.
 - 39% of credentialed religious educator respondents believe that the credentialing process has positively influenced the way they operate their programs. 48% have initiated new programs or activities in their congregations as a result of learnings through the credentialing process.

- 22% believe that the increase in size in their program or congregation is directly related to the credentialing process.
- 77% of congregational respondents indicated that their religious education programs have increased in quality, enrollment, or effective innovations since their religious educator was credentialed.
4. Increase in annual compensation of credentialed DREs.
 - Recruitment and retention on religious educators will be positively influenced by increases in compensation, including structuring positions with sufficient hours to provide effective leadership.
 - 48% of credentialed religious educator respondents reported an increase in hours, compensation, or responsibilities, and that these increases were directly related to being credentialed.
 - 83% of congregational respondents indicated an increase of salary or hours once their religious educator was credentialed, or they used UUA Compensation guidelines in establishing their religious educator's salary.
 5. The position of credentialed DRE becoming a valid, viable, and rewarding career choice as evidenced by an increase in the number of years worked in the field. This includes DREs seeking credentialing at one level first and then the next higher level, as well as serving several congregations during a career.
 - The feedback from candidates going through the program indicates that it is transforming their attitude about religious education from that of a job in a specific church to that of a career with the possibility of career advancement “in place” through increased responsibilities, hours, and compensation as well as the very real possibility of advancement by taking a position at a larger congregation. While congregations may not require credentialing of prospective candidates, there is no question that a credentialed DRE seeking a new position would have a competitive advantage. The prospect of increased mobility will also encourage congregations with credentialed religious educators to take the issue of retention more seriously, which suggests that the congregation will also come to view the position as a career rather than just a job that can be easily filled with someone else.
 - 39% of credentialed religious educator respondents indicate that credentialing has influenced their career goals.
 - 44% have been credentialed at more than one level or are considering doing so.
 - 61% might apply for a position with higher compensation or better opportunities.
 - 30% have changed positions since becoming credentialed.
 6. An increase in continuing education by credentialed DREs as they seek to further develop their knowledge base and skills.
 - As the attitude of credentialed religious educators shifts from job to career, continuing education will become more relevant because these religious

educators will be in the field of religious education, if not a specific position, for the long term. This means that there will be a greater return on their investment in continuing education.

- 61% of credentialed religious educator respondents reported that the credentialing process had an impact in their involvement in continuing education.
7. Congregations increasingly requiring credentialing whether by limiting the search process to credentialed DREs or by requiring eventual credentialing as a condition of employment. This should also lead to acceleration in career advancement either within a congregation through increases in the hours for the position and compensation, and/or subsequent settlement in larger congregations.
- Currently, the credentialing program is largely elective, which means that the motivation for participation in the program rests primarily with individual DREs. One consequence of achieving a tipping point will be a shift in which credentialing becomes either strongly encouraged or required.
 - 9% of credentialed religious educator respondents reported that their congregations have made a requirement of their position.
 - 24% of congregational respondents would either prefer to hire a credentialed religious educator as their next DRE, or would require that a new hire enter the program and become credentialed. An additional 15% would support a religious educator who wanted to pursue credentialing, but would not require it.
8. An increase in the development of quality RE resources and curricula as credentialed DREs create these materials for their own programs and then make them available to other DREs.
- Excellence in religious education depends, in part, on the quality of the resources and curricula that are available. It seems clear that the UUA cannot meet the growing demand for resources and curricula. More and more program innovation and resource development is occurring by religious educators in the field. This will only increase, especially as the number of masters level credentialed religious educators grow. Further, credentialed religious educators will have the skills to better utilize existing resources and curricula. The combination of these suggests that the experience in RE programs and RE classrooms will be significantly enhanced. The professionalization of the religious educators is not the end; it is a means for transforming religious education and congregations.
 - 78% of credentialed religious educator respondents have developed new programs, resources, and curricula since becoming credentialed.
 - 44% of credentialed religious educator respondents reported that as a result of credentialing they have initiated or strengthened programs in Safe Congregations and anti-oppression/anti-racism.
 - 76% of congregational respondents indicated that their credentialed religious educator either implemented a Safe Congregation program,

strengthened policies or procedures in an existing program, or communicated the need for such a program. 67% indicated that their credentialed religious educator provided leadership in anti-oppression/anti-racism efforts where previously there had not been extensive programming or communication efforts.

9. Acknowledgement by ministers and congregations of the benefits that accrue to both as a result of the credentialing of DREs.
 - The ability of credentialed religious educators to enrich and transform religious education in congregations has the potential to both synergistically enhance the life of the congregation and systemically influence the pursuit of excellence in other areas of congregational life. Additionally, vital religious education programs are routinely engines of growth within congregations, helping congregations to become “younger and larger, instead of older and smaller.”
 - The lack of growth in many congregations is a result of congregations being stuck on a size plateau. The inability to move off of the plateau is often a result of the status quo. To the extent that a transformed religious education program can be an engine of growth, it can help in shifting the overall congregational dynamics.
 - 57% of credentialed religious educator respondents report a more positive relationship with their ministers and congregations since becoming credentialed. 100% of respondents have encouraged other colleagues to seek credentialing.
 - 44% of congregational respondents indicated that having a credentialed religious educator has provided added value to their program. An additional 44% indicated that their religious educator already was providing added value before credentialing.
10. Increased support for the development of credentialing programs for other key positions within Unitarian Universalist congregations (e.g., administrators).
 - The vitality of congregations is highly dependent on the effectiveness of staff, which is a combination of aptitude, skills, and motivation, but also the breadth, depth, and effectiveness of staff development. A credentialing process must define the essential knowledge and skill-based competencies that are required for effective and inspired leadership in a staff position. One of the less recognized, but profound benefits of the credentialing process for religious educators has been the development and articulation of these competencies. As these benefits become obvious to congregations, there will be a growing demand for the development and articulation of competencies for other key staff positions, and for credentialing programs to support the development and assessment of these competencies.
 - 14% of congregational respondents either have a staff member involved in another UU certification process or are seriously considering it. 50% indicated that they would support credentialing of other staff, but would

not make it a requirement. 29% indicated that they would provide professional expenses for continuing education so that other staff could become credentialed.

Renaissance Module Training for Religious Educators

Three Renaissance module trainings were conducted in the last reporting period, with seven additional modules scheduled so far for the remainder of the fiscal year. The field test for a revision of the Curriculum module was initiated. The revision, undertaken by Gaia Brown and Pat Kahn, under the supervision of Judith Frediani, includes more information about the Sources of Unitarian Universalism, and some information about the new Tapestry of Faith curriculum.

Interim DRE Training

An Interim DRE Training was held again this year. It was expanded from two to three days, and included many more experiential exercises. We have begun requesting participants and any sponsoring congregations to abide by general guidelines for interim work: an interim does not accept a permanent or acting position in the interim congregation, the interim generally does not remain in the same interim position for longer than two years, and an interim abides by the code of conduct of the professional organization. This year we had seven participants in the training.

UU Musicians Network

Beth William's role with the UU Musicians network has significantly expanded. At the recommendation of Beth Miller and in consultation with Deb Weiner, Beth is replacing Deb as the UUA Liaison to the Musicians Network. She is also lending her expertise in credentialing programs to the UUMN by sharing the responsibility of director of the UUMN certification program with the UUMN Administrator, Donna Fisher.

UUA Information Technology Advisory Committee

Paula Welling, RE Credentialing and Renaissance Program Assistant, has volunteered for a position on this committee.

Settlement

John Weston, Emily Schwab

Survey in Progress

Two search years have passed since the publication of *Responsible Staffing*, the UUA's recommendations to congregations and other hiring bodies (including the UUA Board of Trustees and the MFC) on the prudential measures they should take when calling a minister, hiring staff, and recruiting volunteers who will be in close proximity to children, youth, and vulnerable adults. The UUMA and the Transitions Office are interested in understanding the effect of *Responsible Staffing* on ministers' experience in search, to the end that committees conduct their searches in the spirit of the title—responsibly. The survey is now under way.

The Year in Ministerial Settlement

The 2006-07 season produced 63 ministerial settlements—up seven over 2005-06, up four over the 2001-2007 average, and up twelve over the annual average of the decade before that. Twenty-nine men and 34 women were called or hired to positions new to them, whether their first or their fifth. Their median age over the past two years is 52—eight years older than the ministers coming into new positions in the early ‘90’s.

Two of these are ministers of color/members of historically marginalized communities, and an estimated 11 are members of the GBLT community; two ministers occupy both categories. No co-ministry teams were called this year, after a precedent-setting four the previous year.

For those colleagues departing a position, the long-time median tenure has been seven years. (The Alban Institute considers a pastorate “long” when it endures seven years or more.) Over the past fifteen years the mean has decreased by half a year (to 8.4) and the median increased by the same amount (to 7.4), these changes appearing to reflect fewer very long and very brief ministries.

Over the past several years positions in ministries previously occupied come open by virtue of the (voluntary) resignation (55%), pressured termination (22%), or retirement (20%) of the settled predecessor, with disability and death together amounting to 2-3%. The rate of resignations is up over both five and ten years, pressured terminations are down over both periods, and retirements, while up over five years, are level with ten years ago.

Probably the most remarkable feature of the last year is the difficulty search committees had in identifying their candidate. Close to 20 percent of congregations in search last year will be back at it this fall.

The Year in Interim Ministry

The total number of interim ministries in being this year is 93—thirteen less than last year’s extremely high demand. Thirty-one of these ministries are in their second year—a sign both of the number of congregations unable to find a settled minister to start this year, and a testimony to the growing repute of two-year interims.

Ministerial Development

Jory Agate, Angela Merkert

From Jory Agate

It feels great to be aboard as the Ministerial Development Director for all of ten days now. I am still figuring my way through the ins and outs of being at the UUA after ten years in the parish, but on the whole it feels great to be here.

CENTER

Work continues with the UUMA's CENTER committee and their desire to rethink how the committee supports ministerial continuing education. They will be focusing this next year on mentoring and professional development. They are seeking funding from the Fund for Unitarian Universalism to support the creation of some additional programming.

Addictions Ministry

The Addictions Ministry group held their first conference call of the year. There is a hope to bring together interested folks for a "summit meeting" to determine how best to provide services, resources, support and formal programming to address the issue of both addiction amongst our colleagues as well as within our congregations. Individuals would be invited to represent the following groups: MPL, UUA Board, UUMA Exec., District Services, MFC, Lifespan Faith Development and Youth and Young Adult Ministries. It is felt that much could be accomplished with a coordinated effort to address issues related to addictions throughout our movement.

Ministerial Fellowship Committee

As the outgoing MFC chair I am tying up a number of responsibilities and passing them along to acting chair Phyllis Daniel. I continue working with the committee as one of its staff liaisons. We continue to work on a major revision of the rules and have collected feedback from various stakeholders like the UUMA and the Board of Review. We hope to have a final draft recommendation for your January meeting. There will be some by-law changes required. Work is also continuing on cleaning up our rolls of ministers in preliminary fellowship who have made no progress towards final fellowship in over three years required by our rules. So far, 36 ministers have been removed from fellowship and 21 ministers have been moved to associate fellowship (inactive status).

One of my goals is to get a handle on keeping "in care" all ministers in preliminary fellowship. I hope to assist them to develop the skills necessary to proceed in their ministerial development with a goal towards excellence in ministry. If during their preliminary fellowship they are unable to obtain or maintain a settlement/position, and or have problematic or conflicted ministries, then my hope is to help them either respond to their professional development needs or remove them from fellowship. The MFC and MPL have not kept very good track of our ministers in preliminary fellowship and many have languished for years, even decades without maintaining an evaluated ministry. They are still on our books as ministers in full fellowship. The MFC assistant and I have been working on getting an understanding of who these people are, what they are doing and who needs MFC attention.

First Year Ministers

It is my hope to bring back "home" the First Year Ministers gathering. This has been an online program the past several years, and while I would like to maintain the online connection and support I feel there is tremendous value in bringing ministers in their first year together face to face and connecting them with UUA and MPL resources.

Continuing Education & Career Counseling

Since the beginning of this fiscal year that began July 1, 2007, more than \$11,000 has been allocated to approximately 23 ministers for continuing education grants. The average grant amount is \$478. Over \$7000 has been granted for sustenance to eight ministers for longer-term counseling and career assessments.

Deceased Ministers

Carolyn Buss Podulka, May 27, 1933 - August 17, 2007

Richard George Kimball, August 18, 1934 – June 23, 2007

We will remember them...

Friends and colleagues are encouraged to share their reflections on their ministries at this site: <http://uuminmemorialpage.blogspot.com/>

Office of Church Staff Finances

Ralph Mero, Joyce Stewart, Tracy Withy-Browne, Jim Sargent, Kati Deneen

UUA Health Plan

What a difference a year makes. Last October the UUA Health Plan was just wrapping up its first enrollment and was gauging whether it had the critical mass to launch coverage for 2007. In the end, the Health Plan exceeded enrollment goals by more than 20%, grew throughout 2007, and now covers 228 congregations – *nearly one-third of all congregations with eligible employees*, plus the UUA staff, 11 Districts and affiliated UU organizations, and a fair number of community ministers. We reduced *by half* the number of staff who were without health insurance in the prior year.

The Health Plan's financial performance has been excellent, enough so that the Health Plan Trustees have authorized an open enrollment for 2008. Current surplus exceeds projected surplus by approximately \$200,000, after funding reserves for unreported claims at the full actuarial recommendation of \$425,000. We anticipate that the open enrollment will add at least 150 new employees, putting the plan at 750 employees, significantly broadening the risk base.

At their August meeting, the Health Plan Trustees approved some important changes for January 1, 2008 implementation:

- In response to numerous requests from UU professional groups, we are lowering the threshold for participation to 750 hours worked per year, down from the current 1,000 hour requirement. We hope that the expanded eligibility reaches some of the staff who still do not have coverage.
- Responding to input from seminarians, we will clearly define as eligible all interns in candidate status, who work at least 750 hours per year for a UU congregation, whether paid or unpaid, or as a Community Minister.

- We will permanently add the second High Deductible Plan that we tested in 2007. The plan trades eligibility for a Health Savings Account for enhanced prescription drug coverage.

At their October meeting, the Health Plan Trustees will set the 2008 rates and will likely approve additional benefit enhancements to keep the plan competitive, as well as determining the size of a claims stabilization fund and analyzing stop-loss options for 2008 in light of 2007 claims experience.

Dan Brody, UUA Financial Advisor, who serves also as a Trustee of the Health Plan, will make a full report at the UUA Trustees October meeting.

UU Organizations Retirement Plan

The UU Organizations Retirement Plan under the management of Fidelity Investments remains strong. As of 9/15/07, there were 2,664 plan participants with total plan assets of \$178,922,100. As of 9/15/06, there were 2,570 plan participants with total plan assets of \$157,130,700.

We, in the Office of Church Staff Finances, continue to encourage the plan participants to make their own salary reduction contributions to the plan in addition to the contributions their employer congregations are making. As of 9/15/07, there was \$10,972,200 in the Salary Reduction source in the plan, as opposed to \$7,912,400 as of 9/15/06. We are making progress, but we know we need to work harder to encourage the plan participants to be pro-active on their own behalf as they continue to plan for their retirement.

The more public changes in the UU Retirement Plan came in the statement that plan participants made as they exchanged \$5,204,800 out of the Fidelity Diversified International Fund in the period from August 2006 to August 2007. We believe that the majority of these exchanges were in response to the Office of Church Staff Finances (and others) urging the plan participants to move their funds from the Diversified International Fund because its ownership of shares in Sinopec, a Chinese-owned energy firm whose royalties to the Sudanese government may be contributing to the genocide in Darfur. As the year progressed, the Fund did divest of a significant portion of its holdings in Sinopec. We are encouraged by this but remain committed to this important cause.

UU Group Insurance Plans

Those of you familiar with the UU Group Insurance Plans (UUGIP), Dental, Life Insurance and Long-Term Disability, will remember that the renewal date has been October 1 for some time. With the advent of our new UUA Health Plan and its renewal date of January 1, the UUGIP's renewal dates have been changed to January 1 as well. We hope that this change will make it easier for the congregational leaders in their administration of the insurance plans offered through the UUA. Our insurance broker is currently soliciting competitive bids for the UUGIP coverage. As of this writing we do not know what the new rates will be, but we will shortly, and we will inform the congregations as soon as possible.