

OCTOBER 2015



The Economic Sustainability of Ministries Summit June 2015

The Report



Introduction

Change is a constant, but in recent years the landscape of America has been changing dynamically. Religious communities are being reshaped by these shifting currents affecting American culture, demographics, and economics. The old polarity of progressive vs. conservative theologies is now contending with the growing percentage of all generational groups opting for no religious affiliation, the so-called “nones” who are seeking spirituality without religion, service without membership, the journey rather than an institutional base. Four out of five congregations in the United States are declining.

This dynamic change is reshaping Unitarian Universalism. Some our congregations are growing. Many struggle to hold their own both in membership and finances. Even in growing congregations, finances are often insufficient to meet all desired goals including fair compensation for staff. We typically see new ministers beginning their careers with seminary-related debt averaging around \$50,000. Ministers and staff rarely receive merit increases, and religious educators and musicians in particular are seeing their professional expense lines cut. Well-paying hospital chaplaincy jobs are being converted to on-call positions without benefits. Many community ministers, and some parish ministers, are increasingly forced to be bi-vocational and hold down two or more jobs. This has certainly been true for our musicians. Religious Educators are seeing full-time jobs, with benefits, bifurcated into part-time positions without benefits. We are living in an era of great disparity. Wealth grows for a few and shrinks for many.

These changes present us with great challenges, and also great opportunities. The UUA Ministries and Faith Development staff team, together with other UUA leadership (both lay and clergy) are working to get ahead of the trends. That’s why the UUA convened a Summit on the Sustainability of Ministries in June 2015.



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The Summit: At the Table

A gathering in St. Louis brought together close to 50 individuals for two days of presentations, conversation, and brain-storming. From the beginning, it was made clear that for purposes of this gathering, “ministry” was inclusive of all religious professionals including educators, musicians, membership coordinators, administrators, and other congregational staff.

In keeping with this expanded definition of ministry, all UUA professional groups were invited to send representatives, including the Retired UU Ministers and Partners Association. Starr King School for the Ministry, Meadville Lombard Theological School, and Harvard Divinity were represented as were the UUA credentialing bodies, aid societies, and the UUA Board. The Reverend Peter Morales, UUA President, Jim Key, UUA Moderator, and, Larry Ladd, UUA Financial Advisor, attended along with senior UUA staff. The Reverend Shawn Newton represented the Canadian Unitarian Council and the UU Ministers of Canada. In addition to organizational representatives, the UU ministers serving congregations in the greater St. Louis were invited to attend the Summit. Attention was given to diversity among attendees including generation, race, gender identity, class, sexual orientation, work setting, and geographic location.

In welcoming remarks, the Reverend Sarah Lammert, UUA Ministries and Faith Development Director, asked participants to bring to mind a time in their lives when they faced a change in financial circumstance. As individuals shared their stories, participants recognized how much economic uncertainty affects their lives and their ministries.

Many shared that they live paycheck to paycheck with little or no savings. The housing crisis hit some very hard with their home values still underwater years later. While still paying off their own student loans, some worried about helping their own children pay for college in just a few years. Combined seminary and household (non mortgage) debt exceeding \$70,000 isn't unusual. Some younger ministers shared that they are able to make it only with help from their parents. “Sandwich Generation” participants faced the need to assist both their aging parents and their children. More than a few have had to withdraw money from their retirement accounts, and worry what affect that will have on their own retirement years. One participant was juggling three part-time jobs – none providing benefits. In sharing their stories, many participants noted issues arising out of class and social location, and wondered how our faith might be enhanced if the economic barriers associated with our ministries weren't so daunting.

Sarah Lammert invited participants to step back, assess the current situation affecting religious professionals and religious communities, identify steps that we might take to help address this situation, and challenge ourselves to think outside-of-the-box to find solutions. She called this a “both/and” leadership moment in which we are called be fluent in the languages of maintenance, improvement and innovation simultaneously. Ultimately, we must listen anew for the voice of Love, the source of Life, to call us on to a new way of being.

Opening Presentations: Changing Religious Landscape

The shifting religious landscape of America was explored by three panelists. Carey McDonald, UUA Outreach Director, shared results from the most recent study by the Pew Forum on Religion and Public Life. McDonald noted that 23 percent of all adults report being non-religious in 2014 compared to 16 percent in 2007. Between 2007 and 2014, 19 million Americans joined the ranks of the nonreligious, for a total of about 56 million adults today. Younger generations continue to lead the shift away from traditional religious practices with 35 percent of Millennials claiming no affiliation. But the rise of the “nones” is occurring in every generational group. The Pew study also showed that Unitarian Universalists are getting younger and less wealthy. The number of survey respondents identifying as UU held steady at 0.3 percent of the adult population, estimated as 735,000 in 2014. While encouraging that UUs have not seen the exodus of some “mainline faiths,” our congregations continue to count as members only a fraction of those who self-identify as UUs.

Paralleling the rise of the “nones,” donations to religious organizations have fallen from over 50 percent of total charitable giving in 1956 to approximately 30 percent in 2014. The Reverend Lisa Greenwood of the Texas Methodist Foundation shared that the United Methodist Church has been losing members since the mid-1960s. Total giving has remained relatively constant only thanks to aging members increasing their financial support. Far too many congregations are answering questions that people are not asking. “We can’t go back to the Golden Age of the 1950s,” explained Rev. Greenwood, who is a leading authority on church programming and growth. Religious institutions are offering *programs* while people are seeking *discipleship*. Increasingly, people seek embodiment and experience of faith in their entire lives. Congregations offer a Sunday-based experience that doesn’t always connect to the hunger for spiritual meaning that transcends the church walls. “What do we have to be willing to let go of,” she asked, “in order to have the capacity to allow for the new?”

The final speaker on the panel was the Reverend Tom Schade. Recently retired from parish ministry, Schade is an insightful commentator on contemporary UUism in his blog, entitled “the lively tradition” (<http://www.tomschade.com>) Tom argued that some of the decline in church attendance is related to the rightward lurch of American politics beginning in the 1970s. Conservative churches ascended, resulting in an increasing perception that to be religious in America is to be conservative. Certainly that’s the voice heard most frequently in the media. Schade argued that UUist congregations have fared better than “mainline” churches because of our welcoming embrace of LGBTQ people. Schade suggested that multisite churches are one way to lower costs, but that we also have to shift the conversation about generosity in our congregations. Too often UUs ask what we will get for our money. Generosity needs to be seen instead as a path for liberation. It makes you happier, and it is a way to live out our values.

UU Congregations: Safe Havens vs. Actions of Change?

The UU clergy from the Greater St. Louis area led participants in a moving worship service that explored the call to action heard by, and the tensions felt by, many since the death of Michael Brown in nearby Ferguson the previous year. In her remarks, the Rev. Barbara Gadon shared that the past year had been difficult for many within her congregation, but that the members of her congregation were on fire with passion for the #blacklivesmatter movement. This is a perfect example of “living one’s faith” that many within our society are yearning to experience. While the Summit was called to discuss the economic challenges facing both congregations and their religious professionals, discussion kept returning to the underlying purpose of religious community: to help people lead better lives and create a better world. Carey McDonald observed, “Institutional maintenance, while always necessary, hardly inspires the kind of stewardship and commitment that is required for achieving our core purpose.”

“We can’t go back to the Golden Age of the 1950s. Religious institutions are offering programs while people are seeking discipleship. What do we have to be willing to let go of in order to have capacity for the new?”

~Rev. Lisa Greenwood

Wicked Problems: Introducing Design Theory

UUMA Executive Director, the Reverend Don Southworth, presented the basic concepts of “Design Theory.” The underlying premise of Design Theory is that “wicked” problems require a different kind of thinking to solve. The challenges facing religious professionals and religious communities are “wicked” problems not easily solved. Design Theory is a great way to approach wicked problems. It involves collaborative defining of the problem, problem-solving, testing, redesign, and more testing. Each of six discussion groups were encouraged first to dig into the challenges of ensuring economically sustainable ministries from the perspective of their topic, then begin identifying possible solutions, and finally settle on one or two initiatives that could be tried and evaluated during the coming year.

The Wicked Problem: Disappearance of Middle Class Professions

The economic challenges facing Unitarian Universalist religious professionals, congregations, and the UUA itself mirror what's happening in the larger American economy. UUA congregations are populated by individuals whose own careers are not what they might have hoped a decade or so ago. The middle/professional class is shrinking as educational costs sky-rocket and well-paying jobs with benefits decline. In academia, professorships are increasingly turned into adjunct positions without benefits. Newspapers continue to reduce the size of both their newsrooms and their content. At all levels of government, employees are expected to do more with less. Health care professionals are growing frustrated as allotted minutes with patients are cut and then cut again. Real salaries have long been stagnate while out-of-pocket health costs grow higher and higher. Many workers must work two or more jobs, often without any benefits. The promise of retirement has faded for many. As income declines and debt grows, home ownership is postponed, saving for retirement is deferred (pensions are largely gone), and the hope of paying for the education of one's child/ren dims. These problems are wicked problems which require innovated solutions. What might they be?

Table Discussions: An Invitation to Creativity

Summit participants were assigned to one of six discussion groups. Each group met three times during the Summit. In the initial discussion, groups were invited to delve deeply into their assigned topic. Next, groups were asked to generate ideas that address the existing challenges. Finally, each group presented an innovative idea or two that might be attempted during the coming year. The six groups were:

Theology of Money/New Visions
Sustainability of the Congregational Model
Philanthropy and Church
Levering Our Assets/Endowments
New Entrepreneurial Possibilities
Financial Well-Being from Seminary to Retirement

Table Discussions: Discussion/Brainstorming Summaries

→ *Theology of Money/New Visions*

UU Congregations reside in the broader cultural and economic landscape that has long valued independence and growth. Yet middle class assumptions about self-sufficiency and our ability to live separately in a growth-forever economy have been shattered in recent years. The core question explored by this discussion group is “How might the UU Principles of interdependence and covenant provide a path into the future?” Or to state it slightly differently, “How do we embody the Unitarian Universalist theological understanding of covenant and interdependence in and between our congregations and the world?” How can we advance multi-site ministries to better support UUism in less populated areas? In their annual UUA certification, might congregations be asked to document their relationships with other UU congregations, organizations, and other community-based organizations? Might Clearness Committees be employed in congregations experiencing conflict or struggling to make a significant decision? A congregation could invite a group from a neighboring congregation to deeply listen to their plans and help them reach a decision by asking deeply framed questions. To better sustain religious ministries, congregations might explore non-monetary support. Retired teachers and other members might provide free child care to the children of their staff? Doing so would demonstrate our dependence upon each other. (Discussion Leader: the Reverend Molly Housh Gordon)

→ *Sustainability of the Congregational Model*

While many traditional brick and mortar congregations continue to thrive, membership has declined in four out of five congregations in the United States over the past ten years. Within Unitarian Universalism, adult membership has leveled off while religious education totals have declined. Our congregations are both the problem and the solution to ensuring the economic sustainability of ministries. Many congregations are feeling financially challenged as internally-raised income is not keeping up with desired expenditures. Maintaining a building is often a financial burden. Finding ways to reshape the congregation's relationship with its building is critically important. And how does the congregation find new money to fund exciting new initiatives? Congregations need to understand more deeply their connections to each other and to move their focus from creating programs to nurturing discipleship. Doing so opens new ways to think about membership, financial giving, and volunteering. A guide on how to discuss discipleship within the UU context needs to be developed and piloted. For congregations located a distance from other congregations, we might offer on-line support. The group identified "innovation incubator" support for innovation as a key need and a current lack in our system. We might experiment with a "Dragon's Den/Shark Tank" type program for critique and support of creative initiatives. Ideas could be presented at a GA program, and the audience asked to vote for the best idea which would receive start-up funding. (Discussion Leader: Reverend Ian Evison)

"All these big things are going on and that can obscure the basic problem that the church either has to become cheaper to run or we need to raise more money." ~ Carey McDonald

→ *Philanthropy and Church*

While many Unitarian Universalists are generous in their giving, overall UU giving is below that of many other faith traditions. While mainline churches are struggling, this is not the case with many African-American churches. Many congregations working with economically challenged individuals and families are also financially stable. Generosity is a state-of-mind which is practiced in response to a compelling vision. How can the UUA better equip lay and professional leaders to be more effective in casting our collective vision? Hospitals and universities have invested in professional development staff, but ministers and lay leaders often are uncomfortable asking for money. Several ideas emerged from this discussion group. One is to develop a 20-day Challenge toward More Effective Fundraising. This would include time-limited instruction and coaching. It would be open to anyone who identifies as a UU leader. Another idea is to better promote the Wi\$dom Path curriculum and perhaps develop a companion curriculum focused on congregational fundraising – one that has less than the 12 sessions in Wis\$dom Path. (Discussion Leader: the Reverend Mary Katherine Morn)

→ *New Entrepreneurial Possibilities*

There is growing enthusiasm for entrepreneurial ministry. In pursuing entrepreneurial opportunities, religious professionals, congregations, and other UU organizations are able to introduce our underlying UU Principles to unfamiliar audiences while generating much needed revenue from sources outside of our faith community. Congregations may start a new business or service for the community, ministers may offer spiritual direction, and religious educators might offer on-line courses. An example cited is Headspace which is an app that provides guided meditation and mindfulness practices. In less than 5 years, it has grown to more than 2 million subscribers paying a monthly fee. Might UU congregations publicize classes and spirituality groups through Meetup Apps? How might we better market rituals? Could UU ministers bring an ethical dimension to corporate boards? Let's invite UU religious professionals and congregations to think out-of-the-box and pilot a fee-for-service program directed to the broader community. To succeed we need to let go of fear of negative outcomes, and risk failure. (Discussion Leader: the Reverend Don Southworth)

→ ***Financial Well-Being from Seminary to Retirement***

As congregational staffs have grown, so has the percentage of their budget allocated to salaries and benefits. Might experienced lay leaders who feel a call to parish ministry test whether this is a good career fit by being allowed to serve a small congregation, perhaps part-time, after completing a certificate program and a part-time internship? Already some individuals going before the Ministerial Fellowship Committee have an M.Div. equivalent. Might this practice be expanded to include a broader range of graduate degree programs? As the UUA develops the new “in-care” program for seminarians, financial literacy should be a component. This would help candidates better understand the long-term financial implications of educational debt. Throughout their careers, religious professionals should be provided resources and opportunities to reflect upon their physical, emotional, and financial health. (Discussion Leader: the Reverend Richard Nugent, Director UUA Office of Church Staff Finance)

“There seems to be a lot of fear in this room that my generation doesn’t share. We don’t see the sky is falling: We see the sky is opening up!”

~ Rev. Robin Tanner

Shifting the Frame: Sky is Falling vs Sky is Opening

During the Summit, it was pointed out that we can look upon these disturbing economic and demographic trends as the “sky is falling,” or we can view these same trends as the “sky is opening” to new vistas. The choice of interpretation is largely ours to make.

The Next Steps

How do we continue the conversations and the work begun during the June Summit?

- In the fall, the leaders of the various discussion groups will confer and identify which of the identified projects might be undertaken in the coming year. Some ideas are readily implementable, while others will require “buy-in” from one or more entities.
- A Facebook page, Economic Sustainability of UU Ministries, has been started to continue the conversation among Summit participants and others interested in this work.
- The Council on Church Staff Finances, the ongoing forum for advising the UUA Office of Church Staff Finances, will continue this dialogue within the membership of their own organizations and between themselves.
- In May 2016, a smaller group of individuals will reconvene for additional conversation and exploration of these issues.

Resources

- *The Lively Tradition*, Blog, www.tomschade.com
- *The VUU: Program 107*, June 11, 2015, Church of the Larger Fellowship
- YouTube Program, <https://www.youtube.com/watch?v=6aR7BYRIZmU>

Addendum: Summit Attendees

Unitarian Universalist Organizations

Mary Ellen Morgan, President, Association of Unitarian Universalist Administrators
Rev. Jeanne Pupke, Member, Council on Church Staff Finances
Cathy Seggal, President, Liberal Religious Educators Association
Rev. Sheldon Bennett, Society for Ministerial Relief
Justine Sullivan, President, UUA District Presidents Organization
Lori Emison, President, UUA Membership Professionals Association
Rev. Don Southworth, Unitarian Universalist Ministers Association
Rev. Shawn Newton, UU Ministers of Canada/Canadian Unitarian Council
Tim Anderson, President, Unitarian Universalist Musicians Network
Rev. Jim Eller, Vice President, Unitarian Universalist Retired Ministers and Partners Association
Rev. C. Scot Giles, President, Unitarian Universalist Society for Community Ministry
Barry Finkelstein, Consultant, Congregational Stewardship Services

Seminaries and Credentialing Committees

Rev. Lee Barker, President, Meadville Lombard Theological School
Jesse King, Chair, Ministerial Fellowship Committee
Dan McKanan, Ralph Waldo Emerson UUA Senior Lecturer, Harvard Divinity School
Rev. Rosemary Bray McNatt, President, Starr King School for the Ministry
Rev. Tandy Scheffler, Chair, Religious Education Certification Committee

Unitarian Universalist Association

Tim Brennan, Chief Financial Officer
Rev. Terasa Cooley, Program and Strategy Officer
Jim Key, Moderator
Larry Ladd, Financial Advisor
Rev. Harlan Limpert, Chief Operating Officer
Rev. Peter Morales, President
Rev. Sarah Stewart, Member, UUA Board
Rev. Ian Evison, Regional Lead
Rev. Alicia Forde, Director, Professional Development, MFD
Betsy Gabriel, Manager, Compensation Programs, MFD
Jan Gartner, Professional Development Specialist, MFD
Rev. Keith Kron, Director, Transitions Office, MFD
Rev. Sarah Lammert, Director, Ministries and Faith Development (MFD)
Carey McDonald, Outreach Director, Program and Strategy
Rob Molla, Director, Human Resources
Rev. Mary Katherine Morn, Director, Stewardship and Development
Rev. Richard Nugent, Director, Church Staff Finances, MFD
Sarah Parisi, Administrator, Church Staff Finances, MFD
Rev. David Pettee, Director, Credentialing Office, MFD
Rev. Scott Tayler, Director, Congregational Life
Chris Walton, Editor, UU World

Other Attendees

Rev. Barbara Gadon, Minister, Eliot Unitarian Chapel, Kirkwood, Missouri
Rev. Molly Housh Gordon, Minister, Unitarian Universalist Church, Columbia, Missouri
Rev. Lisa Greenwood, Vice President of Leadership Ministry, Texas Methodist Foundation, Austin, TX
Rev. Paul Johnson, Senior Minister, Unitarian Universalist Congregation at Shelter Rock, Manhasset, NY
Rev. Tom Perchlik, Minister, First Unitarian Church of St. Louis, Missouri
Rev. Tom Schade, Blog Contributor, the lively tradition
Rev. Robin Tanner, Lead Minister, Piedmont Unitarian Universalist Church, Charlotte, North Carolina
Rev. Krista Tavas, Minister, Emerson Unitarian Universalist Chapel, Ellisville, Missouri
Rev. Julie Taylor, Community Minister, Eden Theological Seminary
Rev. Sunshine Wolfe, Interim Minister, First Unitarian Church, Alton, Illinois