

Dreaming Big:
A Collegial Study Group
For Excellence in Large Congregation Ministry
Report to the Panel on Theological Education
March 31, 2008

Dreaming Big is a ministerial development program co-sponsored by the Senior Ministers of Large Unitarian Universalist Congregations (SMOLUUC) and the Ministry and Professional Leadership staff group of the UUA (MPL) created with your November 2007 grant of \$6500. The development team for *Dreaming Big* included the Revs. Janne Eller-Isaacs, Jane Rzepka, Scott Alexander and Gary Smith from SMOLUUC, the Revs. Beth Miller and Jory Agate from MPL, plus a consultant, the Rev. Susan Beaumont, large congregation specialist with the Alban Institute. The plan was presented to the SMOLUUC membership at their annual retreat in February for their approval which they gladly gave. We are so excited about this program, and so concerned about the need it seeks to fill, that we are going forward in faith to offer it beginning Fall 2008, despite not having secured funding. *Dreaming Big* will be announced later this week and applications will be due by May 15, 2008. Our hope is to bring the selected participants together at General Assembly for an opportunity to meet one another and SMOLUUC members.

Dreaming Big is intended for ministers not currently (or only recently) serving in UU congregations of 550 or more members who believe they have a vocation and good potential to serve these congregations as lead or co-minister. Potential participants may be newly settled in a large congregation, intending to seek settlement in a large congregation in the next few years, or working with their current mid-size congregation toward becoming a large congregation. Accredited interim ministers intending to specialize in large congregations will also be considered. Recommendations will be required and a careful selection process will determine the 15 to 20 ministers who will participate.

Dreaming Big will begin in the Fall of 2008 and continue through June 2010. It will include three retreats per year at different large UU congregations, online study and collegial support, assignments between retreats, and a mentoring relationship with one or more SMOLUUC members. Participants will visit six of our large congregations to experience their context and particular expertise first hand. The program will help participants to assess and strengthen their ministerial gifts as well as to understand their weaknesses and determine the kinds of support they will need to function at their best in the dynamic large congregation context.

All applicants for *Dreaming Big* must:

- Show interest and motivation in developing the skills necessary to lead a multi-staff team in a large congregation in our movement
- Be cleared for settlement by the MFC
- Have at least 15 more years of ministry before planned retirement
- Be a member of the UUMA

The application process will include:

- Application form which, among other information, self-evaluates basic competencies.
- Three recommendations: at least one from a lay leader and one from a UU minister in Final Fellowship. Recommendations will also rate the applicant on basic competencies.
- One sermon.
- A file summary supplied by Ministry and Professional Leadership.

The selection committee includes Jane Rzepka and Gary Smith from SMOLUUC, Theresa Cooley (District Executive), a lay leader from the Concord UU congregation, and Jory Agate (MPL staff).

The program will include:

- **Retreats** – 3 per year, hosted in large congregations with guest leader(s) from local congregation and outside consultants for some specific learning goals. Retreats will begin on Saturday evening with dinner, a brief opening worship, and check-in. The group will attend Sunday worship at the host church and observe the entire day including preparation, multiple worship services, religious education, etc. There will be thematic presentations, time with local staff and outside consultants, a preaching practicum and some collegial time during each retreat. Issues of anti-racism and anti-oppression will be addressed throughout the program. Retreats will end on Tuesday afternoon with approximately 6 program modules having been addressed each retreat.
- **Mentor Relationships** – an ongoing mentoring relationship with a SMOLUUC minister including monthly conversations reflecting on previous retreat programs, the reading assignments, current ministry matters, etc., and a visit to the mentor's congregation, will be essential parts of the program. Mentors will be kept informed of the curriculum and guidance on the mentoring relationship will be provided.
- **Homework** - reading will be assigned in preparation for each retreat.
- **Listserv** – participants will be in online conversation with each other between retreats to reflect on reading, retreats, case studies, etc., and to provide support and peer review.

The curriculum will address:

- **Governance Leadership:** Governance is the act of affecting and monitoring the direction of the congregation; the traditions, practices and processes that determine how power is exercised, how members are given a voice, and how decisions are made on issues of congregational concern. The senior minister learns to influence the governance of the congregation through board and policy development, and by influencing the decision making process.
- **Financial Stewardship:** Stewardship refers to the careful and responsible management of resources entrusted to the care of the congregation and its leadership; including physical, environmental, human and financial resources. In the area of financial stewardship the large church pastor needs exposure to financial management (including budgeting), endowment management, fundraising, capital campaign management, and building project management.

- **Staff Team Leadership:** The large church minister leads a multi-staff team. This requires mastering: staff team dynamics (team formation and the management of team conflict), one on one supervision, administering a performance management program (incorporating job descriptions, hiring, goal setting, performance feedback, & disciplinary action).
- **Role Management:** Stepping into a head of staff role presents challenging identity issues. To lead effectively in a large church environment a pastor comes to terms with administration as a form of ministry. He or she must embrace an identity that feels less relational and more managerial. To do this requires exceptional time management skills, clarity of focus, a full awareness of personal leadership style, and re-examination of pastoral care focus.
- **Worship Arts and Leadership:** A hallmark of the large congregation is excellence in worship and preaching. Masterful preaching and worship leadership is required. A large church minister learns to design and lead worship effectively in a team environment. She must learn to manage her persona from the pulpit and to use the pulpit to communicate strategy and organizational vision.
- **Public Ministry-Media Training:** The large church minister is often called upon to represent the congregation and/or denomination in very public settings. Skills in media management and public presentation are required for effective leadership.
- **Managing Church Growth:** The large church is unique in the assumptions it makes about growth, the way in which growth is managed, and the way in which membership assimilation occurs. Senior ministers understand the basic size typologies of large congregations and the paradigm shifts that take place at predictable size transition points.
- **Strategic Decision Making:** The large church minister knows that saying 'no' to the wrong things is as important as saying 'yes' to the right things. He effectively frames and defines issues so that problems are addressed in a timely and appropriate manner. She learns to shape the strategic priorities of the congregation, how to move action forward, and how to gauge the long term impact of decisions that are made.
- **Conflict Management:** All congregations experience conflict, but conflict in the large congregation is complex and multifaceted. The effective large church minister has full mastery of a variety of dialogue tools for framing and shaping conflicts so that they remain functional and growth producing. She has learned which conflicts to ignore and which conflicts need her attention for resolution

Leadership for *Dreaming Big*:

The Revs. Janne Eller-Isaacs and Scott Alexander (SMOLUUC) will serve as program deans and Beth Miller (Director, MPL) will staff the program. The deans will companion folks on all retreats. Additional SMOLUUC ministers and MPL staff will be recruited for specific aspects of the program such as mentoring, managing mentors, managing the listserv and online education, etc. Outside consultants (including Gil Rendle and Susan Beaumont from Alban Institute, plus others) will be employed for their particular expertise. Host ministers and lay leaders from the congregations visited will also staff the retreats they are hosting.

Annual cost of *Dreaming Big*:

While none of the SMOLUUC members or MPL staff will be compensated for their time, the costs associated with their participation will be covered. Participants will be expected to contribute \$1500 per year and can apply to the Ministerial Development Director in MPL for a \$500 continuing education grant each year. There will be miscellaneous costs associated with mailings, telephone, books, etc. Here is the breakdown of annual cost for 20 ministerial participants, 3 regular staff participants, and 4 days of consultants and their travel expenses:

Retreat costs	\$69,000
Consultants	12,000
Misc. admin.	<u>4,000</u>
Cost of program	\$85,000
Less participants' fees	<u>- 30,000</u>
	\$55,000 per year

Fundraising possibilities include:

Although no expectation of funding for implementation was offered in the RFP process, we ask the Panel to consider funding this effort to the greatest extent possible. With fees collected from participants, we will be able to begin this fall and continue seeking funds from a variety of sources:

- Request funding from Association Sunday, Fall 2008
- Apply to the Fund for Unitarian Universalism
- Work with UUA Stewardship and Development to approach individual donors
- Invite large congregations to contribute

Several factors convince us that *Dreaming Big* is an investment toward excellence in ministry that will have a far-ranging positive impact on our ministers and congregations:

- Nearly half of the senior ministers currently serving our large congregations are within seven years of retirement age.
- Specific congregational settings require specialized skills. Excellence in professional ministry includes a number of basic competencies, but much of what constitutes excellence is contextual. The large congregation is a specific context.
- We believe this program can be a model for targeted continuing education and ministerial development toward excellence in a variety of specific kinds of ministry, i.e. program church ministry, youth ministry, non-senior ministry in a team setting, etc.

Thank you for your consideration,

SMOLUUC Members: *Gary Smith* *Janne Eller-Isaacs* *Jane Rzepka* *Scott Alexander*
MPL Staff: *Beth Miller* *Jory Agate*

Attachments: Application Form
Reference Form
Description of Core Competencies

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Application Form

The following pages describe these core competencies for effective large congregation ministers. Please make an honest assessment of your own level of competence in each of these areas and rate yourself based on the following scale:

- 1 = I have demonstrated mastery
- 2 = I have demonstrated skills
- 3 = I have shown potential
- 4 = I have not shown potential in this area
- N/A = I've had no experience in this area

Rate yourself in the following:	1	2	3	4	N/A
Preaching and Worship Leadership					
Public Communication					
Strategy and Vision					
Conflict Management					
Decision Making					
Organizational Agility					
Collaboration					
Spiritual Maturity					
Initiative					
Ego Strength					
Personal Resilience					

Please respond to the following questions in no more than 250 words each.

1. Articulate your call, interest or motivation in large congregation ministry.
2. Of the 11 competencies you rated yourself on above, describe which one of them is your greatest gift for large church ministry and tell us why.
3. Talk about a mistake you made in regard to one of the competencies and how you learned and grew through that experience.
4. Describe what, if any, experience you have had in a large congregation.
5. What are you most concerned about in serving a large congregation?
6. What would you most like to get from a study group on large congregation ministry?

Dreaming Big:
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Reference Form

You have been asked to provide a reference for _____ to participate in Dreaming Big: A Collegial Study Group for Excellence in Large Congregation Ministry. *Dreaming Big* is a ministerial development program co-sponsored by the Senior Ministers of Large Unitarian Universalist Congregations (SMOLUUC) and the Ministry and Professional Leadership staff group of the UUA (MPL). It is intended for ministers not currently (or only recently) serving in UU congregations of 550 or more members who believe they have a vocation and good potential to serve these congregations as lead or co-minister. Applicants may be newly settled in a large congregation, intending to seek settlement in a large congregation in the next few years, interested in large congregation interim ministry, or working with a currently mid-size congregation toward becoming large.

Your Name _____

Address _____

Phone _____ Email _____

How long and in what context have you known the applicant?

Please refer to the following pages describing the core competencies for effective large congregation ministers. Please provide an honest assessment of the applicant's level of competence in each of these areas. Rate the applicant based on the following scale:

- 1 = Applicant has demonstrated mastery
- 2 = Applicant has demonstrated skills
- 3 = Applicant shows potential
- 4 = Applicant does not show potential in this area
- N/A = Applicant has not experienced or not observed

Rate the applicant in the following:	1	2	3	4	N/A
Preaching and Worship Leadership					
Public Communication					
Strategy and Vision					
Willingness to Engage Conflict					
Decision Making					
Organizational Agility					
Collaboration					
Spiritual Maturity					
Initiative					
Ego Strength					
Personal Resilience					

Is there anything you checked above that you would like to articulate further?

Thinking of this person in a large UU congregation, tell us the positive attributes you think the applicant will bring to this context?

What are the greatest challenges you foresee for this applicant?

Have you witnessed theological and spiritual depth in the course of the applicants ministry, and if so, how?

Does the applicant articulate a clear and compelling UU message appropriate to our pluralistic context? Please explain.

Is there anything else we should know about this applicant?

Preparing to Serve As a Large Congregation Minister: Core Competencies

Effective ministers in large congregations demonstrate the following core competencies (behaviors, skills and personal attributes). These core competencies can be enhanced through a leadership development program; however, candidates for lead minister in a large congregation should demonstrate basic competence in these areas before being considered for leadership in the large congregation. Candidates for this program are not expected to demonstrate full mastery of all competencies before admittance to the program. However, some level of proficiency in the following areas is expected.

1. **Preaching & Worship Leadership:** Is a consistently effective preacher and worship leader; able to inspire from the pulpit; communicates a clear and consistent message through sermons that are carefully prepared and artfully delivered; projects the identity and character of the congregation through worship leadership presence.
2. **Public Communication:** Demonstrates a comfortable ease speaking in a variety of settings: both small and large groups, inside and outside the congregation; is effective at addressing both cool data and hot and controversial topics; can get messages across with a desired effect.
3. **Strategy and Vision:** Sees ahead clearly, keeping focused on the larger picture; can anticipate future consequences and trends accurately; is future oriented; casts a compelling and inspired vision for a preferred future; sees possibility; crafts breakthrough strategies.
4. **Willingness to Engage Conflict:** Steps up to conflicts, seeing them as opportunities; reads situations quickly; good at focused listening; can identify common ground and elicit cooperation from others in crafting mutual solutions.
5. **Decision Making:** Makes effective decisions balancing analysis, wisdom, experience and judgment; is aware of the long term implications of choices made; solutions and suggestions are generally regarded as correct and accurate by others.
6. **Organizational Agility:** Astute about how congregations work; knows how to get things done through formal and informal channels; understands the importance of supporting good policy, practice and procedure; appreciates the power in the culture of a congregation; is politically savvy.
7. **Collaboration:** Has a natural orientation toward getting people to work together; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; creates strong feelings of belonging among group members; is a good judge of talent and can accurately assess the strengths and limitations of others.
8. **Spiritual Maturity:** Shows strong personal depth and spiritual grounding; demonstrates integrity by walking the talk, and by responding with constancy of purpose; is seen by others as trustworthy and authentic; nurtures a rich spiritual life; seeks the wisdom and guidance of appropriate mentors; is able to articulate a clear and consistent theology.

9. **Initiative:** Demonstrates ambition for self and the congregation; is highly motivated; enjoys hard work; is action oriented and full of energy for things seen as challenging; seizes opportunity; pushes self and others to achieve desired results.
10. **Ego Strength:** Demonstrates strong and appropriate personal boundaries in relationships; has a healthy appreciation of self, without being egotistical; is emotionally mature; can maintain a non-anxious presence in the midst of turmoil; not overly dependent upon outside affirmation; works to build a strong personal support system.
11. **Personal Resilience:** Learns from adversity and failure; picks up on the need to change personal, interpersonal and managerial behaviors; deals well with ambiguity, effectively copes with change; can decide and act without having the total picture; comfortably handles risk and uncertainty; seeks feedback; expresses personal regret when appropriate.