

**MFC DECEMBER 2022 MEETING**  
**WEDNESDAY, NOVEMBER 30-SUNDAY, DECEMBER 4**

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**Thursday, December 1**

Rebekah Savage, Amanda Poppei, Michael Tino, Alison ALG McLeod, Shirley Lange, Katie Romano-Griffin, Karen LoBracco, Cindy Malley, Joetta Prost, Jackie Clement, Beth Norton, Nathalie Edmond, Jacqueline Brett, Paul Langston-Daley, Greg Ward. Sarah Lammert, Jonipher Kwong, Marta Valentin, Marion Bell, Emily Cherry.

Odyssey – Alison Aguilar Lopez Gutierrez McLeod

1. Motion to approve the Fall 2022 minutes: Joetta moves/Alison 2<sup>nd</sup>. Approved, unanimous.
  
2. Identify Process Observers (Appendix A) Jackie for Power and privilege. Beth Logistics
  
3. Truth and Reconciliation Retreat in January 19-20, 2023. Jacqueline will be attending.
  - By now, each of our orgs have read and affirmed the proposed shared code of ethics. The next thing we imagine is to have a "truth and reconciliation retreat." We know that in order to move forward with deciding how the professional code of ethics will be framed and what it will look like to be accountable, we need to have some space for truth telling about the ways we as religious professionals have experienced harm from one another.
  - fill out our RSVP form

**MFC SUNDAY, DECEMBER 4**

Amanda Poppei, Rebekah Savage, Paul Langston-Daley, Joetta Prost, Shirley Lange, Nathalie Edmond, Beth Norton, Greg Ward, Katie Romano-Griffin, Alison ALG McLeod, Jackie Clement, Jacqueline Brett, Cindy Malley, Michael Tino, Karen LoBracco. Sarah Lammert, Marta Valentin, Jonipher Kwong, Marion Bell.

**FYME: Laura Solomon, Tara Humphries, Althea Smith**

**Guests: Justine Sullivan, Meg Richardson, Sherman Logan**

## **Open Meeting**

First Year Minister Emissaries reports

## **Candidate Working Group Non-Confidential Report**

The co-chairs and panel chairs brought a wondering about readiness of some candidates coming to see MFC. These conversations about preparation are being considered by the CWG and they are looking about changing requirement to make MFC appointment. Right now they only need to have completed either the CPE or Internship to make the appointment. When there was a longer wait to see the MFC, many candidates would have finished or have been beyond the half-way point of their internship. Now, many have only just started their internship. CWG will be considering additional work to be done before they can make an appointment.

## **Settlement Working Group Non-Confidential Report**

The Settlement Working Group was shuffled once again as all Working Groups shifted and Committee members were asked to recommit to an area of their choice. We were also blessed that one of our past members who's done a lot of work requested to stay on. So our current configuration is as follows:

Greg Ward (Co-Chair)

Michael Tino

Shirley Lange

Alison Aguilar Lopez Gutierrez McLeod

Paul Langston-Daley (Co-Chair)

Rebekah Savage

As always, it is our good fortune to have the incomparable Marion Bell and Marta Valentin as our staff partners, without whom we would all be lost.

We are blessed that Greg Ward and Paul Langston-Daley will Co-chair and that Michael Tino has agreed to facilitate the re-design of the Preliminary Fellowship Renewal process.

Greg and Paul are working together to ensure a smooth transition as Greg rotates off the MFC. SWG met on Nov. 21 to work through 7 waiver requests. There were four requests for waivers from Rule 18A, 2 requests for Rule 13 and one for rule 15. We recommended approving 6 of the 7 requests. Details are available in the Confidential report.

But the big news is the progress that is being made with Michael giving attention and focus to the Preliminary Fellowship Re-design. We have put much of our previous research and outreach to good used. Here is a summary of the work:

- 7 recorded sessions of conversations with ministers in preliminary fellowship, with some emphasis of those in non-parish positions.
- A detailed spreadsheet of UUA bylaws, MFC rules and policies outlining which specific rules and policies will require editing to create a more fair and equitable renewal system, specifically for ministers in non-parish positions.
- A rough draft of language which encompass some of the changes
- A rough draft of the renovation of forms which Ministers in Preliminary Fellowship will use in the future.

But what we really want to call the Committee's attention to this meeting is the Guidelines we have agreed to going forward. These emphasize the Working Group's learnings of what (a) ministers – especially non-parish minister's – are asking for in order for the process to feel fair and worthwhile; and (b) it would look like to fulfill our charge to uphold standards of ministry and offer a reasonable assurance of safe care provided by fellowshipped ministers.

## **GUIDING PRINCIPLES**

As we seek to transform the system of preliminary fellowship, here are some guiding principles that we're working with:

1. We believe that the primary purpose of preliminary fellowship is for the MFC to partner with new ministers to identify, strengthen, and integrate healthy and sustainable practices of self-reflection, seeking constructive feedback and opportunities for accountability, creating plans for their ongoing professional development, and nurturing healthy collegial relationships
2. We seek a broader definition of ministry that allows for movement through preliminary fellowship by ministers serving in a wide variety of settings
  - . We seek to de-center parish ministry as the default setting for preliminary fellowship, even if congregations and covenanted communities are still the basic unit of membership in the UUA and thus the basis for our polity
  - . We seek to eliminate class barriers to ministry based in the notion that "real" ministry work is compensated at a certain level
2. We ground our work in an understanding that all of us are learning and growing throughout our lives, careers and callings
3. We seek a process that is more developmental and less evaluative

- . We will make the professional development plan the center of a renewal application
  - . We believe that good mentoring is essential and will endeavor to partner with and empower mentors to do this role well
2. We seek a process that is more relational, encouraging, and supportive
  3. We seek a process that enhances ministry rather than distracts the minister from it
    - . We believe that ministers in preliminary fellowship will grow in resilience and integration with deeper connection and partnership with colleagues, mentors, congregations and/or covenanted communities
  2. We seek a process that understands the complex systems and institutions in which ministry is performed and does not give those systems and institutions unaccountable power over a minister's progress towards full fellowship

With the blessing of the full Committee, the SWG would like to send a copy of these guiding principles to several stakeholders. These notifications will act as a sign of good faith to ministers in preliminary fellowship that changes can be expected in our renewal process as soon as we can work out approval with the UUA board. We hope to send these notices to

- UUMA Leadership
- Ministers in Preliminary Fellowship
- Affiliate groups within the UUA – especially those with ministers from marginalized identities
- All seminaries with a UU advisor
- The UUA Board

It is important to notice a couple things in particular. First, that the Professional Development plan will become the center of the renewal conversation. We on the SWG are advocating that this PDP be explored by candidates long before they begin to prepare to see the MFC. Indeed, we believe it needs to be something early advisors are aware of and early mentors use as a vocational roadmap for a candidate's call. We hope to emphasize this in our conversations with the UUMA leadership in hopes that it become part of mentor training.

Second, initial ideas move the renewal process away from the three-evaluation model. This model is manageable for fewer and fewer ministers who stray from the historically parish structure. Our idea is to ensure the candidate – minister is paired with a strong mentor (again, earlier in the process) who will work through a lens of how well the minister is progressing on areas of competency, recognizing and maintaining appropriate boundaries, self-awareness and an ability to understand and own their own developmental process.

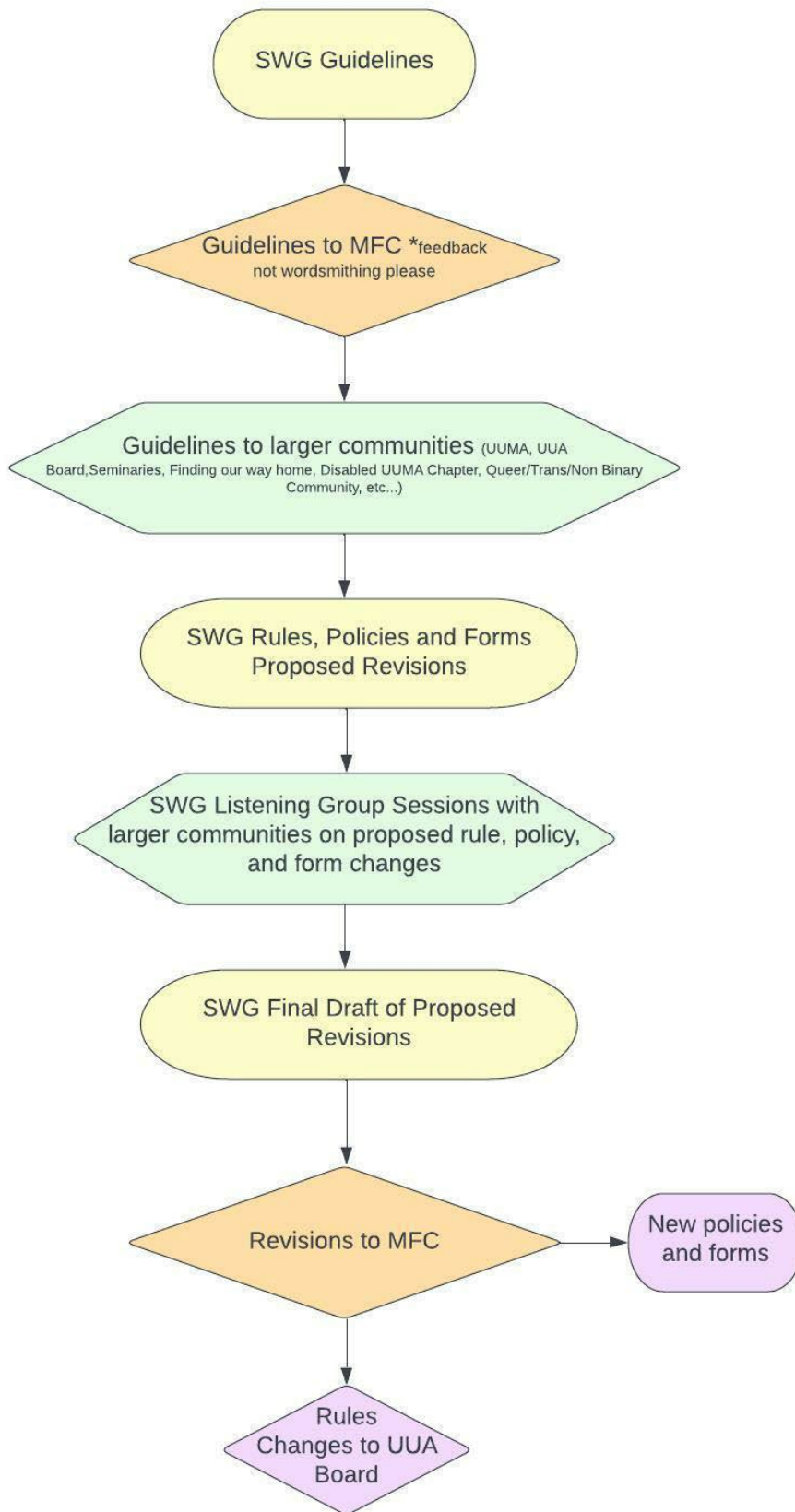
One central Ministerial Formation Team will be needed. Any evaluations from a supervisor or a board would go to this team. This team would have at least one member of the minister's congregation or cohort from their place of ministry. There would still be requirements for the minister to remain in affiliation with a UU congregation or recognized affiliated agency. But this provides a great deal more latitude and flexibility for non-parish ministers to remain in good

standing with the process – exactly the feedback we've received from non-parish ministers thus far.

One exciting idea being discussed is the product of some innovative thinking with Jonipher about the possibility that the MFC might be able to engineer into the process a much earlier conversation with a minister (once they've gained candidate status) to touch base on their call, steps they are taking toward that call, what their PDP looks like, their progress with the MFN and how they are approaching mentoring. This could possibly serve as an initial data point – a little bit like what the RSCC once provided.

You can see that some good thought has gone into this. The SWG is excited. We hope to meet together several times before our spring meeting and put these guiding principles to good use in crafting the specific rule changes necessary and changing the forms to support those rule changes. It is expected that once we have what we feel is a reasonable draft, we will invite more conversations with invested stakeholders – especially those who are in or going in to the renewal process.

Here is a rough draft of a flow chart of the system:



It is not out of the question that a working draft of these changes will be available for review by PWG in late spring or summer.

# Process Working Group Report

Beth, Cindy, Nathalie, Jacqueline, Amanda. Sarah. No chair yet.

## THRESHOLDS FOR MISCONDUCT AND INCOMPETENCE – UPDATED December 2022

Thresholds for Misconduct and Incompetence (to be incorporated in MFC policies or appendix)  
UUA Ministerial Fellowship Committee

*Updated December 2022*

### **Appendix 1 to MFC Policies THRESHOLDS FOR MISCONDUCT AND INCOMPETENCE**

#### **Preface**

*The MFC members are chosen for their experience, knowledge and judgment in Unitarian Universalist ministerial fellowship and religious leadership in UU congregations and communities. Each ministry and/or concern is unique, but the purpose of these definitions is to establish a clear and consistent standard for all fellowshipped ministers based on the expectations of the UUA. MFC members are entrusted with applying the MFC's Rules and Policies to the specific cases they receive, guided by UU values and principles and commitments to anti-oppression and full inclusion, as well as the UUMA guidelines (an interpretation of these values and principles that is endorsed by the professional organization of ministers), and by the wider covenant of the Association. In most cases, the MFC seeks to provide redirection, training, or guidance to address the issues raised. The MFC will only consider removal of fellowship in the most egregious cases, or if the minister fails to cooperate with the process.*

#### **Ministerial Misconduct**

*Misconduct is any action or inaction that violates the principles and ethics of UU ministry, causes harm, undermines the trust required for a successful ministry, or*

*makes a minister unable to fulfill their ministerial role. This may include, but is not limited to, financial malfeasance, harassment, assault, dishonesty, or abuse.*

*Serious misconduct may include, but is not limited to, the following:*

- *Demonstrated pattern of behavior which is prohibited or discouraged by the UUMA Code of Ethics, and which makes the minister's future success in ministry unlikely;*
- *A single action which is illegal or a serious violation of the MFC Rules, UUMA Code of Ethics, or fundamental UU values; or*
- *Other conduct unbecoming a minister.*

### ***Incompetence***

*Incompetence is the inability or unwillingness to fulfill the basic functions of the ministerial role due to skill, capacity, or commitment. These functions are defined as the ministerial competencies and general qualifications which are required for fellowship. To receive a fellowship review based on gross incompetence, ministers will have:*

- *Demonstrated pattern of incompetence across multiple situations or settings over a sustained period;*
- *Received documented feedback from their employers, colleagues, credentialing bodies, UUA Congregational Life Staff, or other appropriate parties on the areas of deficiency or improvement required; and*
- *Been unable or unwilling to improve satisfactorily in a reasonable amount of time.*

### ***Thresholds for Intake and Investigation Reports***

*The intake person in the Office of Ethics and Safety receives initial complaints and makes a preliminary determination about whether the complaint may warrant investigation through the MFC process. If the preliminary determination is that the complaint allegations have a reasonable possibility of leading to a fellowship review based on misconduct or incompetence, a formal investigation will proceed. If the preliminary determination is that the charges do not have a reasonable possibility of leading to a fellowship review, then the intake person can refer the complaint to another appropriate channel. Appropriate channels may include the UUMA, the Review Team (if applicable), or UUA regional staff, among others.*

- *When assigned a case, the investigator will proceed with their investigation in accordance with the MFC's Rules and Policies and the procedures in the Investigative Handbook. Through their investigation, the investigator will ascertain the facts required to determine whether the complaint is substantiated, including engagement with the parties in the*



*case and any additional information the investigator may independently solicit or request from the UUA. This will be the basis for their investigative findings and recommendations.*

- *If the investigator determines the complaint is substantiated, then they shall make a recommendation to the MFC according to the standards for investigative findings and recommendations. The investigator's recommendation must be endorsed by the Executive Secretary and the Executive Vice President, per the MFC's Rules; if the investigator, Executive Secretary, and/or Executive Vice President do not agree on the recommendation, the question is brought to the MFC Executive Committee to determine whether or not to move forward with a fellowship review*
- *If the investigator determines that the complaint is not substantiated, then they will report this as their finding to the Executive Secretary and the Executive Vice President, who will determine if any further action is needed.*

*If the investigator is unable to determine if a complaint is substantiated or if other concerns may arise over the course of investigation, the investigator will confer with the Executive Secretary and the Executive Vice President to jointly determine a recommendation.*

*The investigative report will explicitly name any considerations related to marginalized identities of the complainant(s) and/or the minister, which have bearing on the findings. This includes any contributing factors related to gender, sexuality, race, language, class, ability/disability which have significantly influenced the outcomes described in the complaint, and which run counter to the UUA's principled commitments to equity and inclusion. In particular, in order to counter ableism and live up to disability justice commitments, any investigation into a charge of ministerial incompetence must determine whether reasonable accommodations were provided to address any disability, and whether appropriate consideration of any disability or neurodivergence took place.*

### **Thresholds for Investigative Findings and Recommendations**

*The investigator's findings will be based on the substantiated facts of the case. If the investigator finds that the minister has committed serious misconduct or demonstrated gross incompetence, the investigator will recommend a fellowship review.*

*If the investigator does not find that the minister committed serious misconduct or demonstrated gross incompetence, but does find significant concerns about the*

*minister, the investigator will specify these concerns in their report and the case will proceed as follows:*

- *If the minister has left their congregation or employment setting or is before the Review Team, the investigation report will be referred to the Review Team to determine the appropriate response with the minister.*
- *If the minister is remaining within their congregation or employment setting, the minister will be required to file a professional development plan with the MFC Executive Secretary to address the concerns identified in the investigator's report. The Executive Secretary may refer the case to the Review Team or the MFC Executive Committee in the future if the minister fails to submit or adequately follow an appropriate professional development plan. If the investigator's findings do not show significant concerns about the minister, the complaint will be concluded with no further action needed.*

### ***Thresholds for MFC Recommendations and Decisions***

*Once the MFC receives a recommendation for a fellowship review, the Executive Committee will conduct its process according to the MFC's Rules and Policies. In concluding its process, the MFC Executive Committee should recommend removal of fellowship if it finds that the minister has:*

- *Committed misconduct which is sufficiently serious that it is unlikely the minister could remedy the harm created by their actions or rebuild the trust with the MFC, colleagues, the minister's board and/or congregation or other constituency necessary to continue their ministry; or*
- *Demonstrated a pattern of gross incompetence which makes it impossible to fulfil their ministerial duties, and has failed to make required changes in a reasonable amount of time or demonstrate the potential to make such changes in the future; or*
- *Taken any action that causes serious harm to Unitarian Universalism or the nature of ministerial fellowship; or*
- *Non-cooperation with the MFC, per MFC Rule 28*

*The MFC Executive Committee may consider all substantiated facts and any additional appropriate context to determine whether to recommend removal of fellowship. Removal of fellowship can only be authorized by a vote of the full MFC membership.*

*If the MFC Executive Committee finds that the minister has committed misconduct or demonstrated incompetence but that it does not rise to the level of removal of fellowship, it may impose conditions, requirements, or contingencies,*

*or take any other actions necessary to address the concerns, including placing the minister on probation until concerns are satisfactorily addressed.*

*The MFC can suspend or remove a minister from fellowship by simple vote in egregious or criminal cases.*

## **CHECK IN ABOUT PROVIDING QUESTIONS AHEAD OF TIME**

Jacqueline – everyone expressed appreciation for questions in advance.

Jackie- - everyone received questions and those who were asked said they appreciated receiving them.

Rebekah- felt like we were a little too locked into those questions. Maybe we can just name area of exploration vs. providing exact questions.

Talking Points for Accessibility Statement from the MFC – coming!

Reading list is being reviewed

Wider Path Project-transforming path from aspirant to fellowship in keeping with charges with Commission on Institutional Change who recognized that our narrow path of seminar/CPE/internship may not be most appropriate way for formation as a minister.

### **Small Group Conversations:**

#### **What do we\* need candidates to get from seminary education? (\*we=the MFC, as stewards of our larger faith)**

- The ability to show up with full integration of competencies into strong spiritual leadership
- Theological grounding; support in developing one's own personal theology
- Knowledge of a range of religious traditions so they can engage well and respectfully with colleagues and laypeople
- Application of theological grounding in various parts of ministry (sermons, pastoral care, etc.)
- Ethics/boundaries, safe congregations
- Leadership
- Function of a board
- How to work with layleaders and volunteers

- Administration
- Fundraising
- Systems work/family systems/triangulation/conflict resolution
- Awareness of self (more resourced and less resourced versions of self)
- Spiritual practices
- Religious education across lifespan
- UU identity
- Self care practices

**What qualities necessary in ministry cannot be taught in a classroom?**

- Being in community, emphasizing relationships and collegiality
  - Interacting with other seminarians, religious professionals in formation that come from other religious and spiritual traditions
  - The skills in MAKING community
  - Being a heart led spiritual leader
  - Embracing diversity as a part of formation; negotiating, working alongside, etc. a range of people
  - Can becoming a non-anxious presence be taught?
  - Humility
  - Balancing Self-differentiation
- Integrity, curiosity, willingness to engage with different perspectives, humility, intuition, instinct, groundedness

From Beth/Greg/Joetta/Justine:

What do we need candidates to get from seminary education?

Exposure to theory and history designated in our competencies

Collegial voices responding to content.

Organizational/Administrative skills - defining roles, conflict mgmt, systems, supervision

Theological grounding

Self awareness, boundaries clarification, sense of ministerial authority\*

Self awareness and the ability/willingness to reflect on one's own practice\*

More individualized training programs for people

Fundamentals - polity, UU Theology &History, ARAOMC

**WHAT QUALITIES NECESSARY IN MINISTRY CANNOT BE TAUGHT IN A CLASSROOM?**

Practicum in ministerial authority comes in CPE, Internship\*

Self awareness and the ability/willingness to reflect on one's own practice - again put into practice

From Sarah Alison and Janette:

### **What we need people to learn from seminary?**

Theology  
Competency areas

Learn how to learn

Sheltered environment to make mistakes/fail and get feedback from cohort and teachers;  
integrate knowledge through practicums

Beginning the process/ foundation/ tools – be ready for flexibility and change

### **What cannot be taught in seminary?**

Relational piece with larger UUA partners etc.

How to think theologically

Emotional intelligence

From Amanda Poppei, Karen LoBracco, Jacqueline Brett, Jonipher Kwong (listening) group  
What do we need from seminary?

--baseline proficiency in competency areas (as ID'ed in fulfilling the call)

--history needs something like a class (or independent study)

--articulating theology (you can embody in in praxis, but you need to do some class-like learning of it)

What can't be taught in the classroom?

--some parts of administration, ARAOMC, world religion (we have people who did not get this in seminary -- this comment was more about what people are currently not getting, not what they COULD get)

--difference between what one of our UU seminaries might be held accountable for teaching and what a NUUTS might be teaching

--soft skills you can't teach in seminary, that come through praxis - pastoral conversations, embodying ministerial authority

## **STAFF REPORTS**

Jonipher –

After a rejuvenating sabbatical, I immediately hit the ground running by attending the Panel on Theological Education's meeting in Boston. This was the first time I met this Panel in person since I started this position. We discussed a number of topics including the future of ministry and

am pleased they received a sizable new endowment to help fund future scholarships and grants. While there, I also had an opportunity to connect with Marion and Mary to find out what's been happening since I was gone and we set goals for the upcoming year. It had been a year since the three of us met in person as well!

The next few days were spent connecting with those who had difficulty during the Fall interview and welcoming those who recently achieved Aspirant status as well as those preparing to see the MFC in December.

An interesting gathering I had never been to before was the Military Chaplains' Training in San Diego. There were four people in formation there and it gave me a chance to really go in depth to explore their call to ministry and whatever questions they may have about the process and for me to educate myself on this culture I had never been exposed to before. I left with a renewed sense of appreciation for the service our chaplains provide in an institution where conservative Christians have made quite an inroad over the years.

Finally, I wanted to inform you that upon consulting with the psychologists, I have decided to remove the Charlotte Ministerial Development Center from our list because they have been extremely late getting their reports in. Additionally, they have not addressed some of the concerns we raised last year regarding their forms and overall lack of inclusion to some of our Aspirants. We have a call scheduled for the middle of December. I will keep you updated on how that goes.

On to the numbers. As of November 28,, we have 174 Aspirants and 153 Candidates, for a total of 327 in formation. We are interviewing 18 candidates in December. There are 18 confirmed candidates for our Spring 2023 meeting and 7 confirmed candidates for Fall 2023.

#### UUA Staff Report items for MFC - December 2023

1. Proposal to cap the number of candidates per meeting from 21 to 18 March 2023 due to 1) demand; and 2) to allow for a full Thursday business meeting day.
2. Are people coming to see the MFC too soon? What can we do to discourage people from rushing to the finish line before they are ready?
3. Here are the latest numbers from the Office of Church Staff Finance on UU Ministers and Seminary Debt:

83 Applicants for Debt Relief:

\$220,000 awarded

Total Seminary debt of these 83 applicants: \$6.3 million

Percent of debt awarded.....3.5%

**Average debt owned by the 83: \$75,633** (higher than last year)

Average debt owned by first time recipients: \$67,868 (lower than last year)  
# owing more than \$100,000: 26 (31%): much higher last year it was 22%  
Average Salary & Housing for first time folks: \$56,468

4. The Office of Church Staff Finance has substantially changed their approach to setting [staff salary guidelines](#) to achieve a more equitable approach, following years of study and consultations/focus groups.
5. We will invite the Transitions Team to make a presentation in March about current trends in terms of parish ministry (supply and demand, numbers of developmental ministries, etc).
6. UUMA President Leslie Takahashi made an excellent presentation on intergenerational/cultural trends and tensions for the UURMaPA conference last month which captures a lot of what we are seeing as current challenges in parish-based ministry:

The cultural changes Leslie cited were:

- Disappearance of volunteers since COVID
- Competition of secular life (esp. for religious education and families)
- Decline of religious life in general
- Changing attitudes towards fundraising and giving patterns due to intergenerational challenges
- Awareness of many virtual options
- Expectation of many virtual options
- More awareness around boundaries and less tolerance for boundarylessness
- Less trust in religious bodies

The issues that concerned her were:

- Differences among generations of ministers around attitudes towards worship, pastoral care, acceptable language, working conditions, and compensation.
- De-emphasis on “sense of call”.
- Declining interest in congregational ministry.

I'd only add that we are also seeing an increase in mental health challenges for our ministers and other religious professionals, which in some cases has led people to leave the ministry (this echoes societal trends in the helping professions in general). (Sarah)

Marta – ongoing convo about a community ministry retreat and challenges of a viable way of hosting a retreat.

