**Renaissance Module**

**Administration as Leadership**

**Leader Guide for Online Version**



Faith Development Office

August 2018

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# 

# Introduction to Online (and Hybrid) Renaissance Modules

The [Renaissance program](https://www.uua.org/re/blog/education-for-the-religious-educator-whats-new-with-the-uua-renaissance-program) has expanded opportunities for online learning in several ways; providing a learning platform on [private pages on the UUA website](http://www.uua.org/careers/re/renaissance/online/) for both 100% online modules as well as the online portion of hybrid modules (a series of webinars culminating in an in-person gathering). Some topics require more than the typical 15-hour in person format of a Renaissance module, such as UU History and UU Theology. These modules are comprised of six two-hour webinars with reading and other assignments for each session, along with a final project. Read more about the first online module in this Call and Response blog post: [“Who Said UU History Can’t be Fun?”](https://www.uua.org/re/blog/who-said-uu-history-cant-be-fun)

The Renaissance Office is also adapting existing in-person modules to an online format.  These adapted modules follow the outline of the in-person module, with five two-hour webinars and at least five hours of work between sessions. In addition, some modules have been adapted as a combination of online and in-person learning, known as hybrid modules. Read more about hybrid modules in this Call and Response blog post [“Hybrid Renaissance modules: Survey Says Yes!”](https://www.uua.org/re/blog/hybrid-renaissance-modules-survey-says-yes).

Online and hybrid modules can be sponsored by a group, just as in-person modules are; regions, LREDA chapters, local cluster groups or individual congregations can sponsor modules. And just as with in-person modules, the Renaissance Office provides leaders with the all the resources needed to lead a module. Two leaders are required and are drawn from the leader lists maintained by the UUA’s Renaissance office, which also includes Leaders-in-Training. The minimum honorarium per leader is $600, whether the format is in-person, online or hybrid.

**Creating a UUA Profile**

In order to access online or hybrid modules, leaders and participants must have a UUA profile name. Leaders need to send this information out as early as possible so that participants can access the module and do the necessary preparation.

Go to [UUA.org](http://www.uua.org/) and click on “create account” at the top right and follow instructions on the page. Once you’ve gotten the confirmation, email the Renaissance Office at renaissance@uua.org with your profile name (not email address) to be added to the group. The recommended format is Firstname.Lastname. If you've previously taken an online or hybrid Renaissance module, you are already in the system and should use the profile name already set up.

To access the module online, log in with your UUA profile, and follow the link provided. You can also locate the module by logging in to your account and clicking on your user name at the top of the page. This takes you to your bio page and lists all the groups to which you have access (GROUPS.)  Click the link to the module and it will take you to the module landing page with the sessions and forum access in the left side menu. Or log in and go to the [Online Modules page](https://www.uua.org/careers/re/renaissance/online) and select from the left side menu.

On the Discussion forum page, subscribe to comments. To post on the forum, click on the post and add your comments. Please do NOT “add a new post”. If you’d like to respond to a particular comment, look for the “reply” link below that comment (there’s also a like button and other options). Be sure to save!

**Module Pages**

All online modules follow a similar format and are housed in private pages on UUA.org that are only accessible to those who are in the module group. Module pages include:

* A welcome page that includes the requirements of the module, goals of the module and information on accessing the private pages
* A Background and Preparation page for each session (webinar) that includes required reading, other assignments to be done before the webinar, and links to the Discussion Forum for each session. There are usually things to post before the webinar and reflections or assignments to post after the webinar. This page also includes the webinar information or the recording as well as the agenda for the webinar (“Session at a Glance”).
* A group administration page. The Renaissance Office adds leaders and participants to the group, but leaders are granted administrative access to manage the group “just in case.”
* A shared folder to post documents and other module assignments, as well as webinar recordings. This is set up by leaders, typically using google drive or Dropbox (or any other shared folder resource of the leaders’ choosing). Leaders should forward the link to renaissance@uua.org so that it can be posted on the module pages.

**Webinars**

Webinars are a key component of online and hybrid modules. Leaders can choose to use any webinar platform, however [Zoom](http://www.zoom.us/) allows the most flexibility, especially the use of breakout rooms. The [Zoom Help Center](https://support.zoom.us/hc/en-us) has many articles and videos available.

Leaders follow these steps to prepare for the module:

1. **Determine Zoom Account to be used.** It must be a “Pro” pro account in order to support two-hour meetings and use of the breakout rooms feature. Check with Regional staff or LREDA chapters if you do not have access to a Zoom Pro account. If using someone else’s Zoom account, be sure to check the meeting settings to allow for breakout rooms and co-hosts. Also, check settings for the location of recordings (see #5 below). Find more information about [co-hosts](https://support.zoom.us/hc/en-us/articles/206330935-How-Do-I-Use-Co-Host-) in the Zoom Help Center.
2. **Create the Zoom meetings**. At least two weeks before the module begins, email the meeting links to renaissance@uua.org to be posted to the module pages on UUA.org. It’s also helpful to email all participants the same information prior to the start of the module (and a reminder the day before each webinar).
3. **Create a shared folder** and send link to renaissance@uua.org to be posted on each session page. Webinar recordings are posted in the shared folder as well as documents and final projects.
4. **Practice leading meetings.** Leaders should set up a “training” meeting well before the first webinar to practice starting the meeting, sharing screen, creating breakout rooms, etc. Review [“How to Manage Breakout Rooms”](https://support.zoom.us/hc/en-us/articles/206476313-Managing-Video-Breakout-Rooms) in the Zoom Help Center.
5. **Review the Optional Slides.** Slides are included in the online materials for leaders and can be used at the leaders’ discretion. Slides include text, images, chalice lightings, etc. but do limit facetime due to screen sharing.
6. **Remember to record all webinars**. The recording will likely be saved on the computer of the person signing in (“local recording”).  Designate one leader to start the recording each time (and the other leader should remind them!). After each webinar, upload the recording as well as the saved chat box (optional but recommended) to the folder so that participants have immediate access. Review the [“how to record”](https://support.zoom.us/hc/en-us/articles/201362473-Local-Recording) information in the Zoom Help Center.

**Discussion Forum**

Each session includes a discussion forum in which participants are asked to post both before and after each webinar. Participants (and leaders!) should subscribe to comments in the Discussion Forum in each session. To post on the forum, click on the post and add your comments (do NOT add a new post). If you’d like to respond to a particular comment, look for the “reply” link below that comment (there’s also a “like” button and other options). Be sure to save!

The posts are set up by the Renaissance office; if leaders would like to add posts during the module, contact the Renaissance Office at renaissance@uua.org. Leaders have administrative rights and can add posts themselves, but the Renaissance office is happy to do this. Leaders should post their own introductions before the first webinar and should also review/respond as needed to posts from participants.

**Leader Responsibilities**

* Meet in advance with co-leader to plan and practice using the webinar features
* Provide links for Zoom meetings and the shared folder to renaissance@uua.org at least two weeks before the start of the module
* Download leader guide and all related materials from the Leader Materials section of the private module pages.
* Send welcome email at least two weeks in advance to participants (see sample below)
* Respond to questions and posts in the Discussion forum as needed. Monitor that participants are posting on a timely basis; participants will not get credit for the module if they do not post in the forum. Leaders can alternate responsibility for responding to posts, or they can respond. Decide ahead of time how to handle this.
* Submit the [online leader evaluation form](http://www.uua.org/careers/re/renaissance/evaluation-forms) within one week in order to receive credit for leading the module and remind participants to submit their [evaluation](https://www.uua.org/careers/re/renaissance/participant-eval-form).
* If applicable, supervising/coaching the Leader in Training and completing [Leader in Training evaluation form](http://www.uua.org/careers/re/renaissance/leader-in-training-eval-form)

**Sample Welcome Letter for Online or Hybrid modules**

Date:

Dear Friends:

We, [names of leaders], are really looking forward to leading the Online [name of module] Renaissance Module which begins very soon. We look forward to getting to know you as we explore [something about the module topic].

**Webinar Dates**

We will gather from [start/end time with time zone] for [number of] online sessions on these dates: [list dates].

On [date and time set by team], we will host a Zoom 101 session so that we can all become familiar with the Zoom format that will be used during all of our online sessions.

Attendance is expected for all sessions. An occasional session may be rescheduled as the will of the group dictates. Sessions will be recorded for later viewing.

**To get access to module materials and Webinar links online:**

You will have access to a private section of UUA.org for the module. There you will find all the required course materials, meetings links for each session and access to a closed forum for use by participants to post responses. In order to access these pages, you need a UUA.org account username.

If you don't already have a **UUA.org account**, please go to [www.uua.org](http://www.uua.org/), click "Create Account" in the upper right corner, and create an account. We recommend using something like firstname.lastname instead of “1st Parish DRE” so that the group can easily identify you (and in case you move to another congregation!).

Please email your username to renaissance@uua.org; include the name of the module in the subject line. You will be added to the group membership list and be able to access the module pages. Remember to login each time.

**Module Welcome Page**: [module home page URL]

Goals of the Module

Because there are so many facets to the overall responsibility of a religious educator, it is imperative to keep in mind the big picture of the role. It is easy to get bogged down in a maze of administrative details or to see this as the limit of what the religious educator is capable of offering to the congregation. Learning effective management and organizational strategies will help the religious educator gain the perspective needed to achieve a healthy balance among all the elements of religious education leadership. Capitalizing on one’s energy for the work and acquiring a solid foundation in the management skills that are needed will free up the time needed to strengthen other aspects of religious education leadership.

**Goals of this module:**

* To set the administrative duties in the context of the larger portfolio of religious education leadership
* To appreciate the importance of strong organizational and management skills in administration
* To survey effective means for educating, engaging and appreciating those who share in faith development
* To explore strategies for healthy communication, decision making and delegation.

Effective management and organizational skills are critical to the administrative role. A

**Areas to be explored**

* Being a professional consistent with official employment documents and the guidelines of [LREDA](http://www.lreda.org/) (Liberal Religious Educators Association)
* A collegial and collaborative staff dedicated to right relations
* The art and science of orienting, recruiting and appreciating volunteers
* Policies and procedures to ensure a congregation that is safe for all.
* Healthy and effective means of communication
* Normalization of conflict and guidelines for resolution
* Delegation that helps to manage the time of the religious educator and volunteers
* Learning about a range of decision making strategies and when to use each appropriately.
* Using technology more effectively to store and easily access relevant data

**Weekly Expectations**

* Post your responses to the Reflection Questions in the Forum
* Read and respond to the Forum posts written by your colleagues
* Review articles for the Reader
* Preview handouts
* Communicate with the leaders about any questions or concerns you may have

**Webinar software & Technical requirements:**

You will need a webcam and headset for audio; being able to see each other is critical to building sense of community and a headset minimizes the ambient noise which can be distracting to other participants. Previous participants have reported technical challenges when using a tablet or iPad, so a laptop or desktop is encouraged. You may also want to have a phone handy in case you need to call in instead of using computer audio.

The webinar platform is Zoom, which you can download from [www.zoom.us](http://www.zoom.us/).

Please be sure to test your technology in advance of each session. There will be a practice session one week before class starts for 30 minutes. It will begin at the regular time of class and allow anyone who wants to test their equipment to try it out with one of the facilitators.

**Finally:**

Completion of this module entitles you to the same “credit” as an in-person module and counts towards your Renaissance certification or RE Credentialing portfolio. The expectation is that you will attend all of the online sessions, complete all Discussion Forum postings, do the reading, participate in the webinars, and submit an [evaluation](https://www.uua.org/careers/re/renaissance/participant-eval-form) within one week after the module ends.

We look forward to “seeing” you on [date] as we embark on this great learning journey together!

[Leader Names, email addresses and cell phone numbers]

# List of Handouts

Session 1

Handout 1, Covenant

Handout 2, Schedule, Goals, and Objectives

Handout 3, Introduction to Renaissance and RE Credentialing

Handout 4, Preparation for Module Evaluation

Handout 5, Reflection Questions

Handout 32, Planning for Action

Handout 6, Creating & Sharing Our Stories

Handout 7, The Professional, Politics and Power

Handout 8, Template for Memorandum of Agreement

Handout 9, Template for Half-Time Job Description

Handout 10, Guidelines for Evaluation

Session 2

Handout 11, Gaining Perspective

Handout 12, Creating Covenants

Handout 13, Healthy Communication

Handout 14, Avoiding Negative Triangulation

Handout 15, Faith Development Portfolio

Handout 16, Tasks in Areas of Responsibility

Session 3

Handout 17, Responsibilities of the RE Committee Checklist

Handout 18, Developing Policies and Procedures

Handout 19, Process for Collegial Consultation

Session 4

Handout 20, Guidelines for Right Relations

Handout 21, Conflict Continuum

Handout 22, Cash Register Story Questions

Handout 23, Risk Management

Session 5

Handout 24, How Decisions Are Made/Who Decides?

Handout 25, Cost Benefit Analysis   
 Handout 26, Control/Impact Analysis

Handout 27, S.W.O.T Analysis

Handout 28, Organizational Strategies

Handout 29, LREDA Code of Professional Practices

Handout 30, About Delegation

Handout 31, Delegation Role Plays

Handout 32, Planning for Action

# 

# Leader Resources

## Leader Resource 1: Sample Letter to Participants

Dear Colleagues,

We are excited at the prospect of leading together and sharing the Administration as Leadership Renaissance Module (add dates and zoom info.)

No matter how part-time the job or how small the program, a coordinated, well managed and smoothly running program stems from competent administration. The amount of time religious educators have for the other responsibilities in their portfolio depends largely on how well they understand the procedures that are fundamental to administration. Whether you are brand-new or an experienced leader, we hope to guide you toward greater proficiency in this important aspect of our ministry.

Expectations

Although other areas of religious education leadership are mentioned, only those topics listed below will be covered during the 15 hours of the module.

Criteria for receiving credit for the module:

* Attend all sessions
* Complete an online Evaluation Form within one week of the conclusion of the module.

Handouts and Reader

* Please download and print the file Handouts for Administration Module found on the Module Resources page at <http://www.uua.org/careers/re/renaissance/56010.shtml>). The handouts are the reader for this module, so please read through them thoroughly before the module and jot down notes and questions.

We are looking forward to our time with you,

Names and email addresses of co-leaders

## Leader Resource 2: Pie Chart Graphic

****

**How big is each piece of your faith development pie?**

## Leader Resource 3: Cash Register Story Answers

\_\_\_\_ 1. A man appeared after the owner had turned off his store lights. Answer: ? (The story says a “businessman”)

\_\_\_\_ 2. The robber was a man. Answer: ? (We don’t know if there was a robber)

\_\_\_\_ 3. The man did not demand money. Answer: F

\_\_\_\_ 4. The man who opened the cash register was the owner.

Answer: ? (We don’t know if it was a man)

\_\_\_\_ 5. The store owner scooped up the contents of the cash register and ran away. Answer: ?

\_\_\_\_ 6. Someone opened a cash register. Answer: T

\_\_\_\_ 7. After the man who demanded the money scooped up the contents of the cash register, he ran away. Answer: ?

\_\_\_\_ 8. While the cash register contained money, the story does not state how much. Answer: ? (The story doesn’t say it contained cash)

\_\_\_\_ 9. The robber demanded money of the owner.

Answer: ?

\_\_\_\_ 10. The story contains a series of events in which only three persons are referred to: the owner of the store, a man who demanded money, and a member of the police force. Answer: ? (There could be 5 people – the businessman, the man who appeared, the owner, the police, and the man who sped away)

\_\_\_\_ 11. The following events in the story are true: someone demanded money, a cash register opened, its contents were scooped up, and a man dashed out of the store. Answer: ?

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## Leader Resource 4: Song Sheet and Readings

### HYMNS

Hymn #389 Gathered Here

Gathered here I the mystery of the hour.

Gathered here in one strong body

Gathered here in the struggle and the power

Spirit, draw near.

Hymn #413 Go Now in Peace

Go now in peace, go now in peace

May the spirit of love surround you

Everywhere, everywhere, you may go.

Hymn 396 I Know This Rose Will Open

I know this rose will open

I know my fear will burn away.

I know my soul will unfurl its wings

I know this rose will open

Hymn # 123 Spirit of Life

Spirit of life, come unto me.

Move in my heart all the stirrings of compassion.

Blow in the wind, rise in the sea;

Move in the hand, giving life the shape of justice.

Roots hold me close; wings set me free;

Spirit of life, come to me, come to me.

Hymn #402 From You I Receive

From you I receive, to you I give,

Together we share, and from this we live.

Song: Listen, Listen, Listen

Listen, listen, listen, to my heart song (Repeat)

I will never forget you; I will never forsake you (Repeat)

Listen, listen, listen, to my heart song (Repeat twice and fade on third)

Song: I Am Committed to You

I am committed to you, for you are committed

To all I believe in. I honor the truth in you,

While I search within for the truth in me,

In you, in me, in you….(fade on this line)

Hymn # 1011 Return Again

Return again. Return again.

Return to the home of your soul. (Repeat 2 lines)

Return to who you are,

Return to what you are,

Return to where you are born and reborn again (Repeat 3 lines)

Hymn #1053 How Could Anyone Ever Tell You

How could anyone ever tell you

You are anything less than beautiful

How could anyone ever tell you, you are less than whole

How could anyone fail to notice

That your loving is a miracle

How deeply you’re connected to my soul.

Hymn #1018 Come and Go With Me

Come and go with me to that land

Come and go with me to that land

Come and go with me to that land

Where I’m bound (Where I’m bound) Repeat.

There’ll be freedom in that land

There’ll be freedom in that land

There’ll be freedom in that land

Where I’m bound (Where I’m bound) Repeat

There’ll be justice…

There’ll be singin’…

### WORDS FOR INGATHERING AND CHALICE LIGHTING

Come in, come in,

Come in to this sacred place,

a place made sacred by our gathering in it.

Have compassion for everyone you meet even if they don’t want it

What seems conceit, bad manners, or cynicism

is always a sign of things no ears have heard, no eyes have seen.

You do not know what wars are going on down there where the spirit meets the bone

by William Miller, from The Ways We Touch

May the chalice we light

Inspire us to use our powers

To heal and not to harm,

To help, not hinder,

To bless, not curse.

We light this chalice to rekindle our Flame of Truth.

We light this chalice to replenish our Spirit of Love.

We light this chalice to rededicate our Energy of Action.

May the light which is before us nurture and sustain the light which is within us.

For every time we make a mistake and decide to start again,

We light this chalice.

For every time we are lonely and let someone be our friend,

We light this chalice.

For every time we are disappointed and we choose to hope,

We light our chalice.

In the flame from this chalice

we find the light of faith, the glow of hope, and the warmth of service.

May we ever grow in faith, hope and service as we kindle our own lights from its spark.

May this flame be to us a symbol of the torch that is passed from hand to hand, and life to life –

Of caring and concern and the passion for involvement

which have marked the women and men of our liberal faith

for many generations.

From separate lives, from different paths, we have come.

From separate joys and sorrows we have come.

We have come to make a common life.

And so it is that we expand our joys

and share the burdens of our sorrows.

We have come to watch the ripples of our lives intersect.

And when the ripples stop and peace and stillness have come

We see reflected our community.

What we share this day is sacred.

All gatherings when people meet and touch, celebrate life.

The laughter we share this day is sacred.

Joy and sorrow that rise from love and are shared are sacred.

The stillness we share this day is sacred.

We come to find meaning in our time together.

To grow together in wisdom and love.

Our lives are made up of small moments:

Our gathering here is just such a small moment.

May we affirm and celebrate the moments that we share.

It is a blessing to be.

It is a blessing to be here.

It is a blessing to be here now.

It is a blessing to be here now, together.

To this place we come to share…to learn…to speak…to listen,

And to grow together in the spirit of peace and harmony and love.

May the peace of flowing water be with us; may the beauty of starry skies be with us; may the warmth of companionship be with us; and may the miracle of this world in its fullness bless us this day and each day of our lives.

Welcome to this time of seeking and finding, for it is in our coming together here that we celebrate who we are and who we yet shall be.

### CLOSING READINGS/MEDITATIONS

May we find within ourselves the courage to be who we are.

May we know when its time to listen and when it is time to speak.

May we trust ourselves to be the ones

To find the words that need to be said or to do what needs to be done.

May we trust one another and know there are many ways to go through life.

May we know that though we cannot change some of what life gives to us, we can choose how we deal with what we are given. *Barbara Hamilton Holway*

People say, “What is the sense of our small efforts?”

They cannot see that we must lay one brick at a time, take one step at a time.

A pebble cast into a pond causes ripples that spread in all directions.

Each one of our thoughts, words and deeds is like that.

No one has a right to sit down and feel hopeless.

There’s too much work to do. *Dorothy Day, adapted*

In the end it won’t matter how much we have, but how generously we have given.

It won’t matter much how much we know, but rather how well we live.

And it won’t matter how much we believe, but how deeply we love. *John C. Morgan*

The wonder everyone sees in everyone else they see, and the wonders that fill each minute of time forever; It is for you whoever you are—it is no farther from you than your hearing and sight are from you. Walt Whitman

Let us be still an instant and remember the thoughts we have shared this morning. As we extinguish this flame, let us remember our ties to each other and look forward to being together again.

May our hearts and minds be opened to the power and the insight that weave together the threads of our experience and help us remember the Wholeness of which we are a part.

We come together seeking a reality beyond ourselves that binds us in compassion, love, and understanding to other human beings, and to the interdependent web of all living things.

For a few moments, let us seek quiet - not the quiet that is the absence of noise,

For there is always noise. Rather let us look for stillness as of a friend listening.

Let us pause for a few moments to listen for the stillness that rests beneath the confusion and complexities of our lives.

Remember to respond with silence now and then.

Say nothing. Listen.

Wait for something to come out

For which only silence can make room.

Let us breathe out our hopes for the world of the future.

Let us breathe in the gifts that they brought to us.

Let us breathe out the gifts we have to give to this world.

It must be borne in mind that the tragedy of life doesn’t lie in not reaching your goal. The tragedy lies in having no goal to reach. It isn’t a calamity to die with dreams unfulfilled. It is a calamity not to dream. It is not a disaster not to be able to capture your ideal. It is a disaster to have no ideal to capture. It is not a disgrace not to reach the stars. It is a disgrace to have no stars to reach for. Not failure but low aim is sin.

*Dr. Benjamin Mays*

We must love them both; those whose opinions we share and those whose opinions we reject. For both have labored in the search for truth and both have helped us in the finding of it.

Thomas Aquinas

### WORDS FOR EXTINGUISHING THE CHALICE

We extinguish this flame,

But not the light of truth,

The warmth of community,

Or the fire of commitment.

These we carry in our hearts

Until we are together again.

## Leader Resource 5: Sample Closing Worship

**Closing Reading** From the Holy Quiet of This Hour by Rev. Richard Gilbert Minister Emeritus, Rochester NY

Reader 1

As we prepare to end our time together, let us pause in the blessed silence of this moment to catch our collective breath. There are times when we seem overwhelmed with what we have to do and the limited time to do it. We know full well all the burdens which are ours to bear; they press relentlessly down upon us. The journey may seem arduous; we wonder if we are capable of making it. The paths we have to follow disappear into the woods. At such a time we reach down into the depths of us into a region we sometimes do not remember lives within. And when we do we are reminded simply – to take the next step.

Reader 2

We are not bound to do everything now; we must not complete the journey by sunset; we are not required to be all things to all people; to us does not fall the administration of the universe. We are simply invited to take the next step. Perhaps it will be small and uncertain; perhaps we take it hesitantly, not knowing if we dare; perhaps we take it boldly in hopes the next steps will be easier. However we move into the radical uncertainty of what lies before us, let us remember – all we must do – is take the next step, and it will be enough. Pause…join me in a responsive reading.

**Check Out**

Invite those who wish to share a sentence that crystallizes their experience of the module and the group.

**Responsive Reading (screenshare)**

The Way is long *All*  Let us go together.

The Way is difficult *All*  Let us help each other.

The way is joyful *All* Let us share it.

The way is ours alone *All* Let us go in love.

The way grows before us *All*  Let us begin.

**Extinguishing the Chalice**

We extinguish this flame, but not the light of truth,

The warmth of community, or the fire of commitment.

These we carry in our hearts until we are together again.

## 

## Leader Resource 6: Module Topics/Goals

## 

1. The role that power and politics plays in the work of religious educators.
2. The importance of clarity in official documents.
3. Identify criteria for effective supervision and evaluation.
4. Review congregational governance and polity
5. Explore guidelines for healthy communication
6. Effective responses to triangulation
7. The importance of working collaboratively
8. The importance of a Committee on Ministry and its role in the congregation
9. Responsibilities of the RE Committee
10. Developing policies and procedures
11. The role of good management skills in the area of administration
12. Managing risk in the faith development program and the larger congregation
13. Conflict management style awareness
14. The importance of normalizing conflict and using conflict management techniques
15. Decision making approaches
16. Organizational skills
17. Healthy boundaries for religious education leaders
18. Use of technology
19. Delegation

# SESSION 1: Welcome and Covenant

Session-at-a-Glance

**Welcome and Covenant 20 minutes**

**Orientation 10 minutes**

**Sharing Our Stories 30 minutes**

**BREAK 5 minutes**

**The Professional, Politics and Power 20 minutes**

**Official Documents 15 minutes**

**Evaluations 15 minutes**

**Closing 5 minutes**

**Total Time: 2 hours**

**Goals (copy into chat box)**

This session will:

* Orient the group to the module and share a covenant
* Use personal narratives to get acquainted
* Reframe the role that power and politics plays in the work of religious educators
* Emphasize the importance of clarity in official documents
* Identify criteria for effective supervision and evaluation.

**Learning Objectives**

Participants will:

* Feel prepared to engage fully in the module
* Know what content to expect in the module
* Establish a group covenant.

**Welcoming and Covenant (20 minutes)**

**Materials**

* Chalice, candle and matches or LED-battery operated candle
* Handout 1, Covenant
* Slides 1 - 4 (plus slide for opening hymn)

**Preparation**

* Have slide presentation and web browser ready to share on screen.

**Description**

Show the second slide and welcome participants. Have an opening reading to share. Light the chalice and invite participants to look around the screen and take in one another’s faces, noting that while some are friends or acquaintances, others are brand new to us. Say:

*This group will become an online learning community for the next (two days, week, etc.) and will get to know one another very well. We will share wisdom and reflections with one another, and together enhance the knowledge and skill we each have to lead and administer religious education programs in our congregations. And we will begin at the very beginning, with who we are.*

Invite each person to share their name, congregation, congregation size (both RE program and overall) and where it is located. (Leader note: jot this information down so you will have it to refer to during later sessions)

Once introductions are done, bring up Handout 1, “Covenant” in Word and share your screen. The practice of establishing a covenant is essential for groups that come together for a limited time. Read the covenant together (or assign reading parts) asking individuals to read the various parts. Afterwards, ask participants if there is anything they would add; if so, record directly in the covenant document immediately. Post covenant in the shared folder for the module.

RECORD SESSION

**Orientation (10 minutes)**

**Materials**

* Handout 2, Schedule, Goals, and Objectives
* Handout 3, Introduction to Renaissance and RE Credentialing
* Handout 4, Preparation for Module Evaluation
* Handout 5, Reflection Questions
* Handout 32, Planning for Action

**Preparation**

* Participants should have downloaded the handouts prior to the module; be prepared to send link to hand outs via the chat box in case someone can’t find them. Be ready to share on screen and in chatbox
* Renaissance Module list <https://www.uua.org/careers/re/renaissance>
* Scheduled Modules <https://www.uua.org/careers/re/renaissance/schedule>
* RE Credentialing webpage <https://www.uua.org/careers/re/credentialing>
* Evaluation <https://www.uua.org/careers/re/renaissance/evaluation-forms>

**Description**

Quick review the features of the meeting platform, including the chat box, breakout rooms, muting, raising hands, etc.

Review the schedule of the module (Handout 2), Let participants know you’ll be taking a very brief (5 minute) break halfway through each session. Point out the Collegial Consultation activity in Session 3 and ask participants to prepare for this ahead of time by identifying an issue or situation they are facing for which advice and counsel from colleagues would be helpful. (Also have some examples prepared in the case more examples are needed).

Referring to Handout 3 and the Renaissance Module and RE Credentialing webpages, give a brief overview of the Renaissance program and RE Credentialing as well as a quick rundown of other upcoming modules (<https://www.uua.org/careers/re/renaissance/schedule>).

Moving to Handout 4 and the Evaluation webpage, explain that Renaissance module evaluations, for participants as well as leaders, are online. In order to receive credit for the module, it is the responsibility of the participant to submit the evaluation within one week after the module concludes. Note that the handout is provided for participants to take notes as the module progresses. Technical issues about the meeting platform and discussion board should be communicated to the leaders. If participants perceive a problem with facilitation or group dynamics, encourage them to speak directly to one of the leaders as soon as possible so that the situation can be remedied.

Introduce Handout 5, Reflection Questions, by saying something like:

*Whether or not you are enrolled in the RE Credentialing Program, it is a good practice to write a brief reflection shortly after attending any learning experience. Time is allotted after each session for you to get started on the reflection questions (and to raise other questions or issues not directly related to the session topic that come up for you\*) by posting them on the discussion board.*

Encourage participants to use their reflections for:

* a newsletter article (to keep their congregation informed about their professional development),
* a report to the board (to ensure their congregation’s leadership knows that they are putting their professional expense line to good use), and/or
* their credentialing portfolio (to keep a record of module and provide a short reflection to show how the module influenced their work).

*\*Including things that would usually go in the parking lot or bike rack.*

Introduce Handout 35, Planning for Action, by saying something like:

*You may want to refer to the very last handout (#35) throughout the module. It is a good place to jot down ideas that you may have and want to come back to. Using it throughout the module will certainly make the evaluation at the end easier.*

Ask for volunteers to lead openings/closings. If not all slots are filled after this - ask individual participants to take on specific openings/closings.

**Sharing Our Stories (30 minutes)**

**Materials**

* Handout 6, Creating and Sharing Our Stories
* Slides 5-7

**Preparation**

* Read through passages and select one.

**Description**

Introduce this section by reading, or having a volunteer read, one of these brief passages:

I will tell you something about stories, [he said], they aren’t just entertainment. Don’t be fooled.

They are all we have, you see…

You don’t have anything if you don’t have stories.From *Ceremony* by Leslie Marmon Silko.

or

Wherever a story comes from, whether it is a familiar myth or a private memory, the retelling exemplifies the making of a connection from one pattern to another: a potential translation in which narrative becomes parable and the once upon a time comes to stand for some renascent truth. This approach applies to all the incidents of everyday life: the phrase in the newspaper, the endearing or infuriating game of a toddler, the misunderstanding at the office. Our species thinks in metaphors and learns through stories.—Mary Catherine Bateson

or

Their story, yours and mine -- it’s what we all carry with us on this trip we take, and we owe it to each other to respect our stories and learn from them.—William Carlos Williams

or

We are lonesome animals. We spend all of our life trying to be less lonesome. One of our ancient methods is to tell a story begging the listener to say-and to feel- ‘Yes, that is the way it is, or at least that is the way I feel it.’ You’re not as alone as you thought.— John Steinbeck

Say something like:

*We begin our session with stories because deciding what to share may lead to unexpected insights about who we are as religious educators. When we hear the stories of others, we may gain greater appreciation, a wider perspective, and a broader context in which to recognize how we are connected to those with whom we share this work.*

Explain that participants will create their story using a three part process, starting with an appreciative inquiry exercise, followed by time to reflect on the role mentors play in their story, and ending with a brief summary of how they came to the specific role they have now. Allow five minutes for each part of this process. Participants will weave together these three elements into a story that they are willing to share with others in five uninterrupted minutes.

1. **Appreciative Inquiry (5 minutes)**

With slide 5, introduce the first element, appreciative inquiry. Appreciative inquiry is essentially the art and practice of asking questions...powerful questions. Self-assessment through these questions is an important part of growing professionally. Say something like:

*The traditional approach to assessment is to look at what is wrong or broken or weak. When we look for problems we find them and emphasize them and amplify them. In effect we get the answers to the questions we ask, “What’s wrong with me?”*

Appreciative Inquiry comes from a very different perspective—the perspective of strength and capacity. Ask participants to take the next few moments **(4 minutes or less)** and reflect on the following questions and jot down the words and phrases that come to mind:

* What makes you effective in carrying out administrative responsibilities?
* What specific personal qualities have contributed to your success in administering a faith development program?

1. **Mentors (5 minutes)**

Advance to slide 6 and invite one of the participants to read the following from Handout 6:

*Albert Schweitzer wrote in Memories of Childhood, “I do not believe that we can put into anyone ideas which are not in him already. As a rule there are in everyone all sorts of good ideas, ready like tinder. But much of this tinder catches fire, or catches it successfully, only when it meets some flame or spark from outside, from some other person. ...Thus we have each of us cause to think with deep gratitude of those who have lighted the flames within us. If we had before us those who have thus been a blessing to us and could tell them how it came about, they would be amazed to learn what passed over from their life into ours.”*

Say something like:

*You are in a position of leadership and each of us has come to that role with a range of experience, different gifts, strengths and challenges. Nearly everyone who arrives at this place has in her or his narrative a story about a mentor or someone who has had an enormous influence on their development.*

Ask participants to take a few moments (4 minutes or less) and think about those individuals who have been mentors, asking themselves:

* What was it that “passed over” from them into your life and has remained with you?
* What impact did that gift have on you professionally?

1. **Path to Leadership (6 minutes)**

Advance to slide 7 and ask participants to think about and jot down the sequence of events that resulted in their present position.

Share slide 7 and ask participants to take about five minutes to create a story by weaving together the responses from the previous three exercises. The story is one that they are willing and able to share with others in three uninterrupted minutes. When everyone has created their story, use the Zoom breakout room feature to organize the participants into groups of 3, making sure that individuals from the same congregation are in different groups.

**4. Small Group Discussion (10 minutes)**

Instruct participants that should quickly set a timekeeper and each tell their story in the allotted 3 minutes and then switch speakers. Explain that there is no time during this exercise for comment/feedback regarding the stories.

**5. Large Group Discussion (3 minutes)**

Re-gather in the large group and invite responses to the following questions :

* Were there any surprises or unexpected insights from hearing another person’s story?
* What general observations would you make about this process?

**FIVE MINUTE BREAK**

**The Professional, Politics and Power (20 minutes)**

**Materials**

* Handout 7, The Professional, Politics and Power
* Slide 8

**Description**

Show slide 8 and/or ask participants to look at Handout 7, explaining that this section is intended to provide a new perspective on the use of these fundamentally important words: professional, administration, politics, and power. Say something like:

*People in religious education often think of themselves as being outside the realms of “politics” and “power.” Accepting that being a DRE is a leadership role in a congregation is vitally important and enables you to best serve the congregation as a whole. Accepting the power of this position and learning to work “politically” need not imply either strident aggressiveness or underhanded manipulation. Looking at these words from a slightly different perspective enables you to feel more comfortable and therefore more effective in your role.*

**Large Group Discussion (10 minutes):**

Begin a discussion of the words professional, administration, politics and power. Ask participants to share any thoughts or comments they had when reading the handout before the module. Referring to Handout 7, begin by asking how many participants are members of the Liberal Religious Educators Association (LREDA). Cover these points if they do not come up during the discussion.

**Professional:** What is the value of belonging to a professional organization? Point out the link to the Professional Guidelines and encourage participants to explore this further on their own.

**Administration:** The word *administration* comes from the same root word as *minister*, to serve. One out of many of the responsibilities of a religious education professional is administration. An administrator is one who plans, organizes, and manages the activities of an organization to accomplish its goals over the long run. Knowing the roots and definitions of these words can help us to understand this important role as an important element of this vital ministry.

**Politics:** The original definition of politics centers on public discourse and deliberation to achieve commonly agreed on goals by those with similar as well as diverse points of view. At its core, the word politics is neutral.

**Power:** There is a quiet power that comes from being comfortable in one’s role as well as from holding the position. Acknowledging this power and learning to use it wisely is part of becoming an effective religious educator.

Ask the group:

* What impact might these new perspectives have on them in their work?

**Small Group Discussion (10 minutes)**

Use the Zoom breakout room feature to form groups of three/four with individuals from similar sized congregations or programs. Referring to slide 19–22 and the section on Handout 7 *…If You Are the DRE*, ask the group to discuss the list and reflect on these questions:

* Why might these items be included in this list related to “Professionals, Politics, and Power”?
* How are these items relevant to your particular situation?
* How might acting on these have the potential to lead to increased professionalism?
* Are there other items you would add to the list?

**Official Documents (15 minutes)**

**Materials**

* Handout 8, Template for Memorandum of Agreement
* Handout 9, Template for Half-Time Job Description

**Description**

Lay leaders may make decisions about and create official documents based on their own personal experience in the corporate world, non-profits or other settings. They may be unaware of the importance of creating official documents for staff other than ordained ministers and may be unfamiliar with the resources from the UUA that illustrate or suggest best practices found on the [UUA website](http://www.uua.org/careers/re/re-search-process)

Remind participants of the documents they posted online (job description, contract or memorandum of agreement) as well as Handouts 8 and 9. Allow a few minutes for participants to compare their contract or memorandum of agreement to the template. Say something like:

*A contract is a legally binding document. Both the congregation, represented by the Board, and the religious educator are ethically bound to abide by the conditions of this agreement. If the congregation is one in which the minister hires and fires, other criteria may apply. A memorandum of agreement may or may not be legally binding; check the status in your state.*

Next, ask participants to compare their job description with the template on Handout 9. Say something like:

*While the job description is not a legally binding document, it is important that religious educators have such a document attached to the memorandum of agreement or contract.*

Ask participants to reflect for a few minutes and note for themselves possible changes that would strengthen their current documents.

**Performance Evaluations (15 minutes)**

**Materials**

* Handout 10, Guidelines for Evaluation
* Slide 9

**Description**

Referring to Handout 10, explain that an appropriate evaluation process is a forward-looking, positive effort to examine the planning and work of a congregation with the aim of identifying and praising areas of strength and developing strategies for improvement. Ideally, lay people and the professional staff collaborate in performing the work of the congregation. In an effort to deepen the mutuality of relationships and strengthen collaborative efforts, it is wise to examine the process and the partners including professional staff, congregational lay leaders, and the congregation’s membership. [Assessing Our Leadership](http://www.uua.org/sites/live-new.uua.org/files/documents/mpl/assessing_leadership.pdf) is a valuable online tool for congregational assessment (navigate to the site and share on screen). Suggest that participants review it and share it with staff colleagues and appropriate lay leaders (such as the Board, a Personnel Committee, or a Committee on Ministry).

In most instances, the governance structure determines the reporting structure which in turn, impacts the evaluation process. Show slide 11 and ask participants to share the following information and record responses in the chat box (Leader note: anytime you ask participants to record something in the chat box - read it aloud for those participants who might not be in a position to read the chat):

* To whom does the DRE report in your congregation?

Say something like:

*There are several successful models for reporting and supervision in our congregations. If the parish minister is chief of staff or team leader, the congregation should expect that the staff will develop collegial and collaborative relationships as well clear guidelines about the parameters of the reporting relationship. The language in the contract or memorandum of agreement must reflect the kind of model the congregation wishes to promote. Because of the complexity of the relationship, it is not in the best interests of the religious educator to be supervised or unilaterally evaluated by the Religious Education Committee.*

Next, ask participants to think about the evaluation process in their congregation and raise their hands in response to these questions:

* Does your congregation have a clear process in place?
* Is the process actually followed?
* How many have had an individual evaluation (versus a program evaluation)
* How many are reviewed annually? Semi-annually? Never?
* Was your most recent evaluation helpful in furthering your professional development?

Ask those who raised their hand for the last question to briefly share their experience. Conclude the discussion by saying something like:

*There are many governance structures in our Association which determine reporting, accountability and evaluation. But no matter what the explicit structure is, it is ultimately best practice to make sure that authority and accountability are clear and well documented—in personnel policy manuals, in employment contracts, in job descriptions, in letters of agreement, and in some cases, in a congregation's by-laws. These explicit, written agreements regarding authority and accountability in a congregation then become the basis for evaluation and assessing the ministries of the congregation. The more inclusive the process is, the more likely it is to get a holistic view of the accomplishments and the areas that may need improvement.*

**Closing (5 minutes)**

**Materials**

* Handout 4, Preparation for Module Evaluation
* Handout 5, Reflection Questions
* Slide 10

**Preparation**

* Have a closing reading ready

**Description**

Ask participants to post questions for the Parking Lot/Bike Rack in the discussion forum and let them know you will respond as appropriate. Ask if there are any closing thoughts about this session.

Show slide 12 and remind participants to post their responses to the reflection questions after the session ends. Use the questions found on Handout 5: (and in the discussion forum)

* Do the official documents and the evaluative process in place for me reflect best practices
* What avenues are open to address the need for change in the process and the document?
* What do I understand about how my degree of professionalism is informed by my new understanding of politics and power?

*Ask participants to have drawing paper and marker or colored pencils handy for an activity in the next session (Congregational Dance).*

Suggest that participants make notes about the session on handout 35 to prepare for the online evaluation. Remind them of the start time of the next session and suggest that they review Handouts 11–16 used in Session 2. Ask the designated individual/s to lead the closing words.

# SESSION 2: The Religious Educator in the Congregation

Session-at-a-Glance

**Opening 5 minutes**

**The Congregational Dance 20 minutes**

**Covenants 20 minutes**

**Healthy Communication 15 minutes**

**BREAK 5 minutes**

**Triangulation 15 minutes**

**Faith Development Portfolio 35 minutes**

**Closing 5 minutes**

**Total Time: 2 hours**

**Goals (copy into chat box)**

This session will:

* Introduce the metaphor of “the balcony view” to gain a perspective on the informal and formal structures in congregations
* Review congregational governance and polity
* Reframe the role that power and politics plays in the work of religious educators
* Explore guidelines for healthy communication and effective responses to triangulation
* Set administrative responsibilities in the context of the larger portfolio of the religious educator and provide tools to be a more effective administrator.

**Learning Objectives**

Participants will:

* Create a visual representation of their congregational “dance floor”
* Share experiences related to governance and polity with colleagues from congregations of similar size
* Examine the possible effects of creating a covenant between the religious educator and the congregation
* Role play healthy communication and effective responses to negative triangulation
* Gain an understanding of the tasks required and how they spend their time.

RECORD SESSION

**Opening (5 minutes)**

**Materials**

* Chalice, candle and matches or LED-battery operated candle

**Description**

Welcome participants to Session 2 and invite the designated volunteer to lead a short opening. Briefly review the schedule for this session and make any needed announcements.

**The Congregational Dance (20 minutes)**

**Materials**

* Handout 11, Gaining Perspective
* Slide 11
* Diagrams or descriptions of governance brought by participants
* Drawing paper, markers, regular and colored pencils

**Description**

Explain that organizational leadership experts Heifitz and Linsky have used the metaphor of a dance to gain a better perspective on organizations. There is the view from the dance floor itself, as well as the view “from the balcony” where it’s possible to gain a different perspective on the complex relationships which are not always obvious from the middle of the dance floor. The purpose of the next exercise is to help participants get a clearer understanding of the formal and informal structures in the congregation and who their partners are in this “dance.”

Ask participants to sit comfortably, take a deep breath and close their eyes for a brief guided meditation, saying something like:

*Imagine that you are on a balcony overlooking your congregational “dance floor”. As you scan the dance, look for paid staff, members of committees, lay leaders, children, youth and adults...those with formal leadership roles, informal leaders, those with informal and formal power... notice how they are in relation and communicating...or not. Who is dancing every dance? Who are the wallflowers? Whose dance cards are full? Who is sitting out most of the dances? Who may not be dancing but is enjoying the music?*

Invite participants to take about ten minutes to create a representation of what they saw on the congregational dance floor from their perspective from the balcony using their own drawing supplies.

Re-gather in the large group and have participants put aside their drawings for a few minutes. Show slide 13 and ask participants to refer to Handout 11 and any notes they may have taken before the module. Introduce the notion that governance is the system by which a congregation exercises its authority. A congregation may use any system to govern itself; it may change systems frequently or entirely ignore the systems it claims as its own, but it will continue to exercise authority. Ask participants:

*What is the purpose of establishing a governance structure in a congregation?*

Record responses on newsprint and bring up these points if they are not mentioned:

* Provides a framework that insures all members are represented
* Allows for transfer of leadership with continuity
* Clarifies and justifies authority to take action
* Makes lines of authority clear and accessible to individuals inside and outside the congregation
* Adds transparency to decision making
* Protects leaders by establishing a basis for insuring their actions
* Enables the congregation to form a legal entity and apply for not-for-profit religious status (tax deductibility of pledges and other assets)
* Allows congregation to find insurance and establish financial accounts and credit.

Ask participants to identify the model of governance in place in their congregations as well as the size of the congregation. Record these on in the chat box.

Share the information that in recent years, many congregations have adopted or more frequently adapted the Carver model of Policy Governance®, also used by the UUA Board of Trustees and district or regional boards. Governance is not one size fits all. Simply selecting elements identified with Policy Governance® without doing the necessary work of creating trust and understanding among the members of the congregation may result in a lack of clarity about supervision and reporting and perhaps a breakdown in the system built on an insufficiently strong and appropriate foundation. A “best practice” is for the Board to involve the congregation in the discernment and development process of any form of governance. Drop these links into the chat box for more information: <https://www.uua.org/re/tapestry/adults/newuu/workshop5/leader-resource-1>

<https://www.uua.org/re/tapestry/adults/resistance/workshop6/182368.shtml>

and

<https://www.uua.org/leadership/learning-center/governance/policybased>.

If a congregation is not using the Carver model of Policy Governance®, they most likely are using **congregational polity**, a system of [polity](https://en.wikipedia.org/wiki/Ecclesiastical_polity) in which every [local church](https://en.wikipedia.org/wiki/Local_church) congregation is independent, sovereign, or "[autonomous](https://en.wikipedia.org/wiki/Autonomy)". Its first articulation in writing is the [Cambridge Platform](https://en.wikipedia.org/wiki/Cambridge_Platform) of 1648 in [New England](https://en.wikipedia.org/wiki/New_England).

Ask participants to describe their understanding of congregational polity, referring to Handout 11. What are the four key principles of congregational polity?

• The right of the church to admit members in accordance with its own stated qualifications;

• The right of the church to select its own leadership;

• The right of the church to control its own property; and

• The right of the church to enter freely and voluntarily into association with other churches. -Adapted from Tapestry of Faith Adult Program Faith Like a River

Finish the discussion of governance and polity by having participants use the Zoom breakout room to form groups of three based on congregation size. Continue using Handout 11 and invite them to share their representation of their “balcony view” and their governance model, answering the following questions:

* What are the similarities and differences between what you saw from the balcony such as the informal lines of communication, and the more formal structures that are in place in your congregation?
* How does your congregation regard the role of the UUA staff and the UUA Board as it relates to congregational polity?
* What impact does their stance have on you as a staff person?

**Covenants (20 minutes)**

**Materials**

* Handout 12, Creating Covenants
* Slide 12

**Description**

Introduce the topic of covenants by saying something like:

*Governance is the framework or structure in which we do the work of being in religious community. The Cambridge Platform which provided for independence and defined polity also affirmed the importance of congregations coming together. We are all familiar with our Principles, the preface to which states, “We covenant to affirm and promote...” So it is too, that within the governance structure of our congregation we seek covenantal relationships. Engaging in the process of covenanting is useful in answering several important questions about the relationship of the religious educator, the congregation, the minister, and the Religious Education Committee. This may be a simple process of putting into words what everyone already agrees to, or it may illuminate difficult issues that need a structured process of resolution.*

The focus for this discussion is on covenants between the religious educator and the congregation and the congregational covenants of right relations; staff covenants will be covered in the next session.

Show slide 15 and ask participants:

* How many of you have a religious education covenant with your congregation?

Then ask how many have a congregational covenant of right relationships? Ask a few volunteers to share their experience as you review Handout 12.

**Healthy Communication (15 minutes)**

**Materials**

* Handout 13, Healthy Communication
* Slide 13

**Description**

Introduce this section with the quote from, saying something like:

*Do you remember the famous line from the Paul Newman classic, Cool Hand Luke - “What we got here is a failure to communicate”? Let‘s hope we never have to say or hear that infamous line!*

Modeling healthy communication is critical to being successful in our role as religious educators. Ask participants to review the guidelines for healthy communication on Handout 13 and any notes they took before the module. Advance to slide 16 and ask if there are other practices they would add to this list. Review both pages of this handout and record any additions in the chat box.

As Leaders, it is our role to display a high level of Emotional Intelligence. From the UUA Leadership Lab,

Emotional Intelligence includes:

* Forbearance, e.g. having self-control, especially when provoked.
* Presence and functioning, i.e. a high level of self-awareness with an alignment between the body and the mind.
* Knowing and taking responsibility for one’s own functioning in the system.
* Modeling humility when a mistake is made.
* Modeling grace when another makes a mistake.
* Being aware of what one’s emotional triggers are.

Often, authors in the area of leadership use the phrase “Having a Non-Anxious Presence.” This means being fully present, and having a high level of Emotional Intelligence. As time allows, have participants share some examples of how they modeled either healthy communication or a non-anxious presence in their congregation. For more information: Mark Berstein video on Non Anxious Presence <https://www.youtube.com/watch?v=fizHe1Fqyvo>.

**FIVE MINUTE BREAK**

**Triangulation (15 minutes)**

* Handout 14, Avoiding Negative Triangulation
* Slide 14

**Description**

Ask participants to define the word “triangulation.” According to the dictionary, it’s most commonly used to express a situation in which one person will not communicate directly with another person, but will communicate with a third person, which can lead to the third person becoming part of the triangle. The concept originated in the study of dysfunctional family systems, but can describe behaviors in other systems as well, including work.

Point out that as with other words, triangulation is a neutral term; there can be situations that are definitely triangulation which have a positive purpose and often a positive outcome. Ask for examples of positive triangulation in a congregational or other setting.

More frequently however, triangulation in congregational setting is a negative experience. Advance to slide 17 and handout 14, ask participants to share an experience they have had or know about that they would describe as negative or toxic triangulation. Allow time for discussion. The guidelines on the handout may be useful in responding to triangulation:

1. Have you talked directly about this with the person?
2. If the answer is no, encourage the person to do that.
3. I feel uncomfortable talking about this with you but it seems important to you so I’d be happy to have the staff person in question get in touch with you.
4. If the person indicates a reluctance to speak directly to the person, encourage them to speak to someone from the Committee on Ministry.
5. If the person is reluctant to do either of these things say something like: I can’t be helpful in solving the problem because our staff covenant prevents me from continuing the conversation. If you can find a way for you to convey your message so that the person in question can respond, it’s more likely that you can find a solution to the problem or address your concern.

**Faith Development Portfolio (35 minutes)**

**Materials**

* Handout 15, Faith Development Portfolio
* Handout 16, Tasks for Areas of Responsibility
* Slide 15

**Description**

Administering a program is one of the areas of responsibility of a religious educator within the larger Faith Development portfolio. No matter how part-time the job or how small the program, the congregation expects that things will be coordinated, organized and run smoothly. The amount of time DREs have for the other roles in their portfolio depends largely upon how well they understand administration and the management procedures that are a fundamental part of that role.

There is some risk in creating a hierarchy for the portfolios as each one is equally important to the congregation; this module focuses on providing tools to be a more effective administrator of the program. Recognize that there is an organizational component or administrative function connected with all the ministries within the congregation.

Review Handout 15 and the four major areas of responsibility (philosophical, educational, administrative, and theological) to make sure there is clarity on the distinctions between and among them. Ask participants what they would add to each category and record on newsprint.

Say something like:

*We often hear that religious educators wished there was more time for the creative parts of the job. Creativity takes many forms and the administrative ministry of religious education carries with it many opportunities for innovation. An effective administrator works with others to create structures or systems which work effectively.*

Invite participants to spend around five minutes to create a list of everything they do in a typical week—a full seven days. While there are times of the year that are more labor intensive than others, particularly around start up, holidays, special events or end of the year, for this exercise they should choose a more typical week.

After five minutes, ask participants to locate Handout 16 and have them place the items on their list in the appropriate area of responsibility.

Display slide 18. Remind participants that the blocks on the handout do not represent equal periods of time spent. There may be many more tasks listed in one of the areas of responsibility than another but that does not necessarily mean that the tasks take more time. Encourage participants to take this into consideration when making the proportional pie charts.

Ask participants to take a blank piece of paper and draw a circle on one side. Using their designation of areas of responsibility on Handout 16, have them create a pie chart that represents how much of their time is spent on each area in your portfolio. Label each one either P, E, A, or T for the headings of the columns on the handout. When they are finished, repeat the same exercise but this time allocate the time as the minister, RE Committee or congregation **assumes** they spend their time.

When they are done, lead a discussion about the exercise, asking:

* Were there any surprises for you in this activity?
* Are there any discrepancies among the areas?
* How would you like to change the way the pie is divided? What would it take to balance it?

Suggest that when they get back home, a good minister/RE Committee and DRE discussion might start with the pie chart exercise:

* How does the RE Committee spend its time?
* How could it spend it more creatively?

This is also useful for a youth group to get clarity on how they are balancing the different elements of youth programming.

Conclude this by saying something like:

*This exercise was included to raise your awareness about something that may be otherwise ignored—the possible difference between our perception of our roles and the way others may see them. It can also inspire motivation for appropriate changes in how you spend your time and in how you might educate others to see the reality of your responsibilities. Acknowledge the percentage of time spent on administration and understand that it is only one part of your entire portfolio.*

**Closing (5 minutes)**

**Materials**

* Handout 4, Preparation for Module Evaluation
* Handout 5, Reflection Questions Slide 19

**Preparation**

* Invite participant who has previously volunteered to lead closing words.

**Description**

Ask participants to post questions for the Parking Lot/Bike Rack and let them know you will respond as appropriate. Ask if there are any closing thoughts about this session.

Show slide 19 and remind participants to post their responses to the reflection questions after the session ends. Use the questions found on Handout 5: and in discussion forum

* What are the implications of where I am in the congregational dance from the vantage point of the balcony?
* What are the implications of the governance model and congregational polity on me as the religious education professional?
* As a result of this session, what new understanding do I have about my administrative role in the larger portfolio I hold and my place in the congregational dance?

Suggest that participants make notes about the session to prepare for the online evaluation. Remind them of the start time of the next session and suggest that they review Handouts 17–19 used in Session 3.

Remind participants to prepare for the Collegial Consultation by identifying an issue or situation they are facing for which advice and counsel from colleagues would be helpful.

Ask the designated individual/s to lead the closing words.

# SESSION 3: Partners in Faith Development

**Opening 5 minutes**

**The Staff Team 25 minutes**

**The Religious Education Committee 30 minutes**

**BREAK 5 minutes**

**Collegial Consultation 50 minutes**

**Closing 5 minutes**

**Total Time: 2 hours**

**Goals (copy into chat box)**

This session will:

* Highlight the importance of working collaboratively and being an empathic member of the staff team
* Discuss the importance of a Committee on Ministry and its role in the congregation
* Explore the responsibilities of the RE Committee
* Review a process for developing policies and procedures
* Introduce the “Collegial Consultation” process.

**Learning Objectives**

Participants will:

* Engage in a staff team “triage” exercise
* Learn how to strengthen the role of and empower the members of the religious education committee
* Practice developing a policy or procedure
* Experience a problem solving strategy specific to the individual participant in the area of administration or management.

RECORD SESSION

**Opening (5 minutes)**

**Materials**

* Chalice, candle and matches or LED-battery operated candle

**Description**

Welcome participants to Session 3 and invite the designated volunteer to lead a short opening. Briefly review the schedule for this session and make any needed announcements.

**The Staff Team (25 minutes)**

**Materials**

Handout 12, Creating Covenants from Session 2 Preparation

Slide 16

**Description**

In theory, the mission for staff teams is to promote Unitarian Universalism and nurture the next generation of Unitarian Universalists. Because of the variation in the ways congregations govern themselves, there is no fixed idea of who comprises the leadership team of any particular congregation. Commonly it includes the parish minister, religious educator, administrator and depending on the circumstances, the music director. Regardless of the structure, it is to the advantage of each congregation to capitalize on the gifts of each member of the team. One of the important factors in developing a sense that “we’re in this together” is being empathetic to the other members of the team.

* 1. **TRIAGE ACTIVITY (15 minutes)**

Introduce the next activity by asking participants to define triage. As needed, explain that triage is the task of Emergency Room staff team assessing patients who arrive in the emergency room to determine who should be seen by a staff person and in what order. Congregational staff teams may indeed have emergencies that have to be dealt with, and there is also triage needed to figure out how to respond to the questions, concerns or issues that come to one or another of the staff team. This activity will give participants the opportunity to practice “triage” as part of a staff team:

**Large Group Discussion:**

1.Invite participants to call out questions or concerns that are likely to come to church staff members – allow five minutes for this. One of the leaders should type ideas/suggestions that come up into the chat box.

2. Assign roles to participants.

* Parish Minister
* Religious Educator
* Administrator
* Music Director

3. Via discussion, ask participants to decide who each idea/suggestion would come to first. Then as a group, decide who is responsible for each of the questions, issues or concerns and how it should be handled (such as:)

* Consult with staff team. Handled by individual.
* Handled unilaterally by individual staff.
* Consult with Staff Team Decide on best response.

Show slide 20 and lead a discussion with the larger group asking:

*What insights, if any, did you have into how the dynamics of a staff team might be changed or improved if there were opportunities to share around these kinds of issues?*

* 1. **COVENANTS (5 minutes)**

While the governance model in a congregation may include a supervisory and/or reporting structure, the model does not preclude mutual accountability. Establishing a covenant among the members of the staff team is one way to define accountability within the staff team. It is important for a staff group to engage in a process that results in a document that states what the staff group will affirm and promote. Engaging in the process will increase the odds that the document will be successful in guiding the actions of all members. It is useful in answering several important questions about the relationship of the religious educator, the congregation, the minister, and the Religious Education Committee. This may be a simple process of putting into words what everyone already agrees to, or it may illuminate difficult issues that need a structured process of resolution.

Ask participants how many have a staff covenant. Invite a few volunteers to share their experience. Point out that Handout 12 on creating covenants from the last session lists the elements of a strong covenant and guidelines for when and how to revisit the covenant. This same process can be used when a staff group is creating a covenant.

Examples of staff covenants can be found in the Reach list archives; search for “staff covenants”. Stress that while it may be interesting to see covenants created by others, *it is critical that those who are covenanting engage in the process together.*

* 1. **REPORTING AND SUPERVISION (5 minutes)**

There are many practices around reporting and supervision that are employed by congregations. While there is no one “right” way, having the DRE report to the RE Committee should be avoided. The relationship between the religious educator and the RE Committee is at its best a collaborative one in which the roles are clearly defined, regularly reviewed, and modified as necessary, it is usually not in the best interests of the congregation to have the RE Committee supervise or unilaterally evaluate the religious educator. If the model of governance is one in which the parish minister is chief of staff or team leader, it is important to work at developing a relationship among the staff that is collegial so the language in the official documents should reflect the kind of working model the congregation wishes to promote. Ask participants to describe the reporting structure in their congregation and record on newsprint. If some of the following are not represented in the responses of the participants, suggest them as possibilities:

* Subcommittee of the Board
* Small group drawn from the Board, Personnel Committee and Religious Education committee
* Small group from the congregation appointed by the Board with nominees suggested by the religious educator and the Board
* Small group consisting of the parish minister, the chair of the religious education committee and a member of the Committee on Ministry

Whatever the explicit structure, authority and accountability must be clear and well documented—in personnel policy manuals, in employment contracts, in job descriptions, in letters of agreement, and in some cases, in congregational by-laws. These explicit, written agreements regarding authority and accountability in a congregation then become the basis for evaluation and assessing the ministries of the congregation.

**The Religious Education Committee (30 minutes)**

**Materials**

Handout 17, Responsibilities of the RE Committee Checklist

Handout 18, Developing Policies and Procedures

**Description**

There are different ways to structure the volunteer groups that are responsible for faith development. Whatever the structure in the congregation, there are core responsibilities that lead to effective programming for children, youth, and adults, and in making the best use of space, resources, and personnel.

The Committee should be composed of at least three members in the smallest fellowship; as the program grows, the Committee should be larger. At some point, usually in mid to large congregations, it becomes more effective to operate as a council of sub-groups, each charged with a portion of the total task. It is wise to have rotating three-year terms to provide continuity for the program and to avoid the necessity of rebuilding the Committee each year. The size of the Religious Education Committee is determined not only by the number of people necessary to carry out the various tasks, but also by the richness of human resources necessary to build a strong program for all. Ideally, the Committee will represent the diversity of the total fellowship/ congregation.

1. **RESPONSIBILITIES OF THE COMMITTEE (10 minutes)**

Invite the participants to locate Handout 17 and any notes they may have taken before the module. In order to keep this section moving along, you may wish to alternate going over each of the sections, or ask volunteers to help out. The purpose is not to share individual answers to the questions but rather to make sure that the participants have an opportunity to ask clarifying questions. In particular, point out those areas that may require having policies and procedures in place.

Say something like:

*Depending on the size of your existing committee, their current responsibilities, and the bylaws which govern the congregation, you may find that there are many more areas of responsibility on this handout than could possibly be covered by your REC. However, doing this review and sharing it provides the opportunity for the committee to give some consideration to these questions as part of a visioning process or as part of an annual review. You may be serving a congregation that is involved in transition and it may be trying to go along with an outmoded organizational pattern that could be improved if it stepped back and looked at these questions.*

After reviewing the last area, Nurture of the Committee, share this reading: (or ask a volunteer to read)

*Committees are groups, not individuals, and our faith is that interpersonal exchange and shared responsibility not only generates better decisions for our group and lightens the load, but is also more rewarding personally as members spark each other with commitment and enthusiasm. It means the committee must meet regularly for this to happen at least once monthly. Regular meetings are essential to plan, perform, and evaluate, yes; but more than that, the meetings provide the opportunity for the “profound” aspect to emerge.*

*When people work together regularly in a fellowship setting that encourages them not only to get the job done but also to care about each other, then the religious--rather than simply the housekeeping--dimensions become manifest. And when the committees take on personal as well as business concerns, and engage in priority setting, then the religious process of identifying what is worthy--what we as people need from our congregation or fellowship--humanizes a task-oriented committee into a group religious adventure. It is then that we transform the committees from mere engines of duties into a profoundly human dance.* From *The Profound Committee* by Vern Barnet

1. **POLICIES AND PROCEDURES (10 minutes)**

Invite the group to brainstorm a list of areas around which the RE Committee should develop policies and record in the chat box. Then select one of the areas for which a policy is needed and quickly go through the process on Handout 18 to clarify how the work can be distributed and completed.

1. **FINANCIALS (10 minutes)**

Remind participants of the financial documents they posted online. Say something like this:

*There is an important principle around finances. Our congregations and its ministries are better served if a budget is driven by priorities rather than waiting to see what comes in during the annual canvass and then distributing it.*

Use the Zoom breakout room to break into small groups based on size of congregation.

Ask participants to review the questions in the “Financials” section of Handout 17 and share their experiences with each other.

Re-gather in the larger group and invite questions or comments that came up in the small groups. Offer these key points in closing:

* The operating budget for the faith development program, approved by the Board and voted on by the congregation, should provide sufficient funds to run the program and should be tied to the mission of the congregation
* The RE Committee should not be responsible for raising funds to cover operating expenses. Fundraising may be appropriately undertaken for special projects, social justice, outreach or service trips by the youth group and members of the congregation, but the faith development program should be fully funded by the congregation
* The compensation for the religious education staff should not be part of the RE program budget.

**FIVE MINUTE BREAK**

**Collegial Consultation (50 minutes)**

**Materials**

Handout 19, Process for Collegial Consultation

**Description**

Introduce the consultation activity by saying something like:

*It is a rare religious professional who does not experience a difficult situation or thorny problem for which the advice and counsel of a colleague is useful. In the first session, we invited you to be thinking of situation facing you that might benefit from the insights, advice and counsel of others to help you gain a better or different perspective to find a solution. Before we engage in this consultation, please take a few moments to review (or write) the description that you can read to the others in your small group so that your consultants understand what it is you need in order to come to a workable solution or approach to the problem or issue.*

Remind the participants that this is not to be an opportunity to whine or gripe but a chance to come up with creative solutions or strategies. After everyone has finished writing their issue, review the process using Handout 19. (Look over handout together prior to break out rooms and remind participants that the method is essential during this activity and they will benefit from following it.).

Use the Zoom breakout room to form groups of three and make sure that each group has a watch or other device to time each section and to take breaks as appropriate during the exercise. Be sure representatives from the same congregation are in different groups; if appropriate, consider size of congregation when forming groups.

Ask for any questions before consultations begin; remind groups that the total time for the consultation is 35 minutes.

When the consultations are complete, re-gather the larger group and spend about five minutes discussing the exercise. Invite comments about the value of the process and/or how this process could be used in their own congregation.

**Closing (5 minutes)**

**Materials**

Handout 4, Preparation for Module Evaluation and Handout 5, Reflection Questions Slide 21

**Preparation**

Identify a volunteer to lead the closing words.

**Description**

Ask participants to post questions in the Parking Lot/Bike Rack in the forum and let them know you will respond as appropriate. Ask if there are any closing thoughts about this session.

Show slide 21 and remind participants to post their responses to the reflection questions after the session ends. Use the questions found on Handout 5: and in discussion forum

* What gifts do I bring that contribute to the effective collaboration of the staff group? If there are impediments to creating a collegial environment, what steps seem reasonable in addressing this issue?
* To what extent is the Religious Education Committee responsible for the program? How does their level of ownership affect my work? What strategies do I want to employ to increase their level of ownership if that is needed?
* How useful was the problem solving strategy and are there ways it can be used with groups and committees in my congregation?

Suggest that participants make notes about the session to prepare for the online evaluation. Remind them of the start time of the next session and suggest that they review Handouts 20-23 used in Session 4. Ask them to complete the Conflict Continuum on Handout 21 before the next session.

*Remind participants to complete the Intercultural Conflict Styles Inventory (*<http://www.icsinventory.com/>*) and watch* [Feldman’s Theory of Differentiated Leadership](https://www.youtube.com/watch?v=RgdcljNV-Ew) *before the next class. Leaders need to have done this self-assessment prior to the next session as well.*

Ask the designated individual/s to lead the closing reading.

# 

# SESSION 4: Management Skills

**Opening 5 minutes**

**Management Intro 10 minutes**

**Self-Management 15 minutes**

**Conflict Continuum 10 minutes**

**Conflict Management**

**Cash Register Story 15 minutes**

**BREAK 5 minutes**

**Management & Resolution 20 minutes**

**Risk Management 35 minutes**

**Closing 5 minutes**

**Total Time: 2 hours**

**Goals (copy into chat box)**

This session will:

* Appreciate the role of good management skills in the area of administration
* Survey the steps needed to manage risk in the faith development program
* Learn about your internalized conflict management style and with awareness, learn to use alternative styles.
* Understand the importance of normalizing conflict and using conflict management techniques

**Learning Objectives**

Participants will:

* Appreciate the role of good management skills in the area of administration
* Explore their internalized conflict management style.
* Discover some tools that can help with risk management & congregational safety.
* Practice developing policies around conflict management

RECORD SESSION

**Opening (5 minutes)**

**Materials**

* Chalice, candle and matches or LED-battery operated candle
* Opening reading

**Description**

Welcome participants to Session 4 and invite the designated volunteer to lead a short opening. Briefly review the schedule for this session and make any needed announcements.

**Management Intro (10 minutes)**

**Materials**

Slide 17

**A. Introduce the topic of management :**

Say something like:

*Management is a function that must be exercised in any organization; leadership is the relationship that can energize a relationship. Religious education professionals are responsible for both functions but it is foolhardy to believe that you can accomplish them on your own. Approaching the management of risk, conflict and volunteers as a team effort not only safeguards the boundaries of the religious educator but also enriches the religious and spiritual development of our children and youth by the range of skills, aptitudes and qualities found when two or more are working together toward the same goals.*

**B. Volunteer Management**

*A large part of managing a religious education program is spent on basic tasks related to the management of volunteers. There is no one best way to recruit, orient, support and recognize volunteers. It is a good idea to consider whether the process in place in the congregation is a coherent one that has the potential to create a culture of active participation by a wide range of adults as well as youth in the congregation. There is an entire Renaissance module on this topic called Teacher Development that delves deeply into the topic of volunteerism.*

**Large Group Discussion**

Engage participants in a 5 minute conversation around management as a team effort. What strategies have the participants successfully used to gain buy-in from other staff and volunteers?

**SELF-MANAGEMENT (15 minutes)**

**Materials**

Intercultural Conflict Style Inventory

Video: <https://www.sophia.org/tutorials/intercultural-conflict-styles-and-inventory--2>

Info: <https://s3.amazonaws.com/woca-s3/telligent.evolution.components.attachments/13/1637/00/00/00/00/65/20/Intercultural+Conflict+Styles+for+AFS+%26+Friends.pdf?AWSAccessKeyId=AKIAJC2S635RRRB3EOPQ&Expires=1536340402&Signature=olE9tYKdC1w0xv%2bEA2KZPeU%2b0ss%3d>

[Feldman’s Theory of Differentiated Leadership](https://www.youtube.com/watch?v=RgdcljNV-Ew)

Slide 18

**Description**

Read this quote from Arthur Brooks, president of the American Enterprise Institute

*“The most important management task is learning how to manage yourself. You can't manage other people unless you are managing yourself. You can’t help other people to control their emotions, such that they can be really productive, such that they can work together in teams, such that they can maximally fulfilled and creative unless you are doing that for yourself and so the first management task is self management. Self management is being a leader to yourself.”*

Then say something like:

*Often in our volunteer trainings we reinforce with our volunteers that the children in their classrooms will pick up on whether they have had a bad day, whether they are prepared, or on the flip side, whether they are in a calm space and comfortable in their ability to be present and maybe ready to have some fun. This is also true for you in your leadership role with the volunteers. If you are prepared and calm in yourself, your volunteers are more likely to be as well.*

Previously we discussed the phrase “Non-Anxious Presence.” As we discovered, being a non-anxious presence does not mean that you play the piano while the ship is sinking. It means that you are differentiated\* enough to experience the stress of the moment , acknowledge it, and do what needs to be done about it without it being able to overwhelm you.

**Large Group Discussion:**

Let’s talk about ways that can help us handle the stress of working in a congregation. Does anyone do anything that particularly helps them?

**CONFLICT CONTINUUM (10 minutes)**

**Materials**

Handout 20, Guidelines for Right Relations

Handout 21, Conflict Continuum

Slide 19

**Description**

Introduce the Conflict Continuum by reminding participants that as religious leaders in congregations, it is imperative that we are aware how we each contribute to the resolution or escalation of conflict that may arise. Remind participants of the Conflict Continuum on Handout 21 that they completed before this session and invite a few comments on the exercise and any insights they may have gained from it. Suggest that this may be a useful tool to use with the congregational REC, the Board or other groups with which they work.

Discuss these questions found on slide 24:

* What insights from the results of your responses on the Conflict Continuum might be of value in being more effective in conflict situations in the future?
* What value do you think there would be in sharing this exercise with other staff? With others in the congregation?

Re-gather in the larger group and say something like:

*Many times conflict may arise simply because we do not hear each other. Not just hear the words but actually listen to what the person is saying. What are some of the things we do instead of actually listening?*

Offer these if they are not mentioned by the group: interrupting, directing, bossing, threatening, moralizing, offering “shoulds,” “oughts,” or “fixes,” lecturing, judging, blaming, shaming, stereotyping, withdrawing, distracting, interrogating, humoring, diagnosing, denying…

Conclude this section on conflict management by saying something like:

*By being proactive about policies around conflict management and resolution, we will not prevent conflicts for they are inevitable; however, we can more predictably determine that conflicts are less likely to be sharply divisive if everyone is aware of the rules of engagement. Congregations become stronger and healthier to the extent that there are clear and widely publicized policies of what is expected of members and their relationships with one another and those who work on the congregation’s behalf.*

Ask participants if they had any further insights from the Intercultural Conflict Style Inventory that you discussed earlier.

**CONFLICT MANAGEMENT (45 minutes)**

**Materials**

Handouts 22 Cash Register Story Questions

Slides 20

Leader Resource 3, Cash Register Story Answers

**Description**

1. **THE CASH REGISTER STORY (15 minutes)**

Read “The Cash Register Story” below. Be sure to explain that you will read it only once and will not answer any questions.

*A businessman had just turned off the lights in the store when a man appeared and demanded money. The owner opened a cash register. The contents of the cash register were scooped up, and the man sped away. A member of the police force was notified promptly*.

Invite participants to find Handout 24 Cash Register Story Questions and allow two minutes for participants to quickly answer the questions individually.

**Large Group Discussion (10 minutes):**

Bring participants back from their small groups and reveal the correct answers found on Leader Resource 4. Show slide 23 and ask the group:

* What is the relevance of this story to the topic of conflict?

**FIVE MINUTE BREAK**

**2. CONFLICT MANAGEMENT AND RESOLUTION (20 minutes)**

An important element in conflict resolution and normalization is complete and accurate communication; an important role for the religious professional is to create policies around communication. Ask participants to name the congregational issues around which they have already created policies or guidelines and record these in the chat box.

Say something like:

*By creating policies in advance you present the assumption that conflict is an ongoing and very normal part of congregational life. Visitors and members who are informed about these policies or guidelines will know what the expectations are in these areas. Using the Purposes and Principles to create conflict management and resolution guidelines may give you a sense of what it means to use UU values as the foundation for your work.*

**Small Group Discussion (15 minutes):**

Use the The Zoom breakout room to form small groups, if possible, with people they have not yet worked with. Explain that they will have approximately 15 minutes to begin the process of developing policies around conflict. Direct the groups to review Handout 25 together and check items that contain language from which you might write policies or guidelines for managing and resolving conflict. For example, using the first principle we could begin with, “Because we value the inherent worth and dignity of each person, we will...” What follows should express concrete actions that are clear, concise and unambiguous.

**Large Group Discussion (5 minutes)**

When the groups have finished, invite them to look at the example at the bottom of the handout where this strategy is used with children and youth. In some cases, the religious educator has initiated this process before the adults have dealt with the issue for adults. Ask participants if this has happened in their congregations.

**Risk Management (35 minutes)**

**Materials**

Handout 23, Risk Management

Required reading:<https://www.uua.org/safe/handbook>

**Description**

Introduce the topic of risk management saying something like:

*When we make our spaces and relationships safe for the most vulnerable among us, it makes our spaces and relationships safer for everyone. Working with the most vulnerable of our populations, typically the youngest and eldest members of a congregation can place them and us in risky situations. Risk management is the responsibility of the entire congregation. As respected leaders, we must do what we can within our responsibility to be proactive in creating policies to reduce or prevent risky situations rather than waiting to react to a crisis.*

In addition to the required reading, <https://www.uua.org/safe/handbook>, there are a number of resources that are available to help congregations create policies to protect children, youth and adults. [Balancing Acts](http://www.uua.org/safe/children) is a manual written by Rev. Deborah Haffner available on the UUA website. The [Safe Congregation Handbook](http://www.uua.org/safe/handbook) is also available online o; it contains an extensive list of resources, including

free safety resources from [Church Mutual Insurance Company](https://www.churchmutual.com/index.php/choice/risk/page/intro/id/21). (Leader note: drop these links into the chat box.)

**Group Read (10 minutes):**

Ask participants to look at Handout 23 and any notes that may have taken before the module. Explain that the purpose in reviewing the handout together is not to answer all the questions but to make them aware of the areas of concern that have been identified. The goal is to raise awareness and go back to the congregation and share these questions.

**Large Group Discussion (25 minutes):**

Invite participants to type in the chat box ways they have sought buy-in from the congregation or congregational leaders for this or other ventures.

Typically congregations place a higher priority on some aspects of safety than others - which ones get the attention in your congregation?

Does your congregation have a safer congregation team? If so, what is it’s purview? What constituent groups are represented by the members of the team?

**Closing (5 minutes)**

**Materials**

Handout 4, Preparation for Module Evaluation

Handout 5, Reflection Questions

Slide 25

**Preparation**

Identify a volunteer to lead a closing reading.

**Description**

Ask participants to post questions in the Parking Lot and let them know you will respond as appropriate. Ask if there are any closing thoughts about this session.

Show slide 25 and remind participants to post their responses to the reflection questions after the session ends. Use the questions found on Handout 5: and in the discussion forum

* What insights did I gain from the results of the Intercultural Conflict Style Assessment?
* What changes would increase my overall effectiveness in normalizing and managing conflict?
* What is the congregation doing well to manage risk? What could it be doing a better job at? Who are your allies to cause positive change in this area?

Suggest that participants make notes about the session to prepare for the online evaluation. Remind them of the start time of the next session and suggest that they review Handouts 24- 32 used in Session 5. Before the next session, remind participants to watch the following YouTube videos: [Life on the Mobius Strip by Parker Palmer](https://www.youtube.com/watch?v=Qo00-zidiTQ&feature=youtu.be) and [Rocks, Pebbles and Sand Story](https://youtu.be/v5ZvL4as2y0).

Ask the designated individual/s to lead the closing reading.

# SESSION 5: Integration and Application

**Opening 5 minutes**

**Decision Making 20 minutes**

**Organizational Strategies 30 minutes**

**BREAK 5 minutes**

**Creating Healthy Boundaries 15 minutes**

**Delegation 20 minutes**

**Planning for Action 10 minutes**

**Module Review 10 minutes**

**Closing 5 minutes**

**Total Time: 2 hours**

**Goals (copy into chat box)**

This session will:

* Learn about various approaches to decision making and their relative effectiveness.
* Offer examples of organizational skills and uses of technology
* Consider the importance of creating healthy boundaries for religious education leaders
* Explore ways to improve and/or expand the use of technology
* Present the theory and teach the skills of delegation
* Review all elements of the module
* Provide an opportunity to integrate the elements of the module into an action plan.

**Learning Objectives**

Participants will:

* Engage in an approach to decision making and teach others the approach.
* Learn organizational skills and explore the use of technology
* Reflect on the importance of creating healthy boundaries
* Role play the skills of delegation
* Develop a personal plan of action.

RECORD SESSION

**Opening (5 minutes)**

**Materials**

* Chalice, candle and matches or LED battery operated candle
* Opening reading

**Description**

Welcome participants to Session 5 and invite the designated volunteer to lead a short opening. Briefly review the schedule for this session and make any needed announcements.

**Decision Making (20 minutes)**

**Materials**

Handout 24, How Decisions Are Made/Who Decides? Handout 25, Cost Benefit Analysis,

Handout 26, Control/Impact Analysis, and Handout 27, S.W.O.T Analysis

**Description**

Looking at Handout 24, spend about five minutes reviewing the various types of decision making participants may be faced with in their leadership role; invite responses from the participants related to the horizontal continuum of the handout. Make this point if not mentioned by participants:

* The amount of time, number of people involved, and sense of ownership among constituents all increase as one moves along the continuum toward consensus

After the review of the handout, review the list of issues and ask which method of decision making is most appropriate for each one. If time allows, ask if anyone has run into difficulty by using an inappropriate style of decision making and invite a few participants to briefly share their experience.

Ask participants to take out Handouts 25-27 along with any notes that may have taken before the module. Use the The Zoom breakout room to form three smaller groups and assign each group one of the approaches to decision making – cost/benefit analysis, control/impact analysis or S.W.O.T. analysis – and give each group a sheet of newsprint. Instruct the groups to spend ten minutes reviewing the appropriate handout to be sure that they understand the concept and then to use the model to analyze the designated scenario. Have the groups to designate a scribe and a reporter(s) who will explain the concept to the larger group. After ten minutes, allow each group no more than five minutes to present their scenario and analysis technique to the other groups. After each group presents, invite participants to suggest other ways they might use this approach.

**Organizational Strategies (35 minutes)**

**Materials**

Handout 28, Organizational Strategies Appendix: Online Resources

Slide 21

**Preparation**

If not using slides, list technology use questions in the chat box.

**Description**

Ask participants to look at Handout 28 and any notes they may have taken before the module. Display slide 26 and review these points:

* 1. **To Do List** - A key factor in successfully administering and managing a program is the ability

to set priorities, but that means knowing what it is that needs to be done. Ask participants how many have a “to-do” list? Invite those who feel they have a good system in place to share with the group. What form does their “to-do list” take? When and how do they review it? After several people have shared, make the point if it has not already come up that knowing what needs to be done is the first step in identifying priorities and managing time and resources effectively. Remind participants that groups like the RE Committee can also benefit from this practice.

* 1. **Establish priorities**—Review these three strategies:
     + 1. **Eat That Frog**

Say something like:

*There’s an old saying to the effect that if you wake up in the morning and eat a live frog, you can go through the day knowing that the worst thing that can possibly happen to you that day has already passed. In other words, the day can only get better! In his book Eat That Frog!, Brian Tracy suggests that you undertake the most difficult, least appealing task first thing so you know after that the worst has already happened. However, he also suggests that if you’re going to eat a frog, don’t spend too much time looking at it! That’s just a folksy way of saying don’t procrastinate by planning and strategizing about the job. Just do it! Otherwise, you are likely to talk yourself out of doing it at all and it will live to face another day.*

* + - 1. **Move Big Rocks**

Share this story with the group, .

*This story has been circulating for many years about a time management expert who when speaking to a group of students used the following illustration. He pulled out a one gallon, wide mouth Mason jar and set it on the table in front of him. Then he produced about a dozen fist sized rocks and carefully placed them, one at a time, into the jar. When the jar was filled to the top and no more rocks would fit inside, he asked if the jar was full and everyone answered "Yes."*

*He said, "Really?" and reached under the table and pulled out a bucket of gravel. He poured some gravel in and shook the jar so that the pieces of gravel worked themselves down into the spaces between the big rocks. Then he asked the group once more if the jar was full. By this time the class was on to him.*

*"Probably not," one of them answered. He reached under the table and brought out a bucket of sand. He started dumping the sand in the jar and it went into all of the spaces left between the rocks and the gravel. Once more he asked if the jar was full. "No!" the class shouted. Then he grabbed a pitcher of water and began to pour it in until the jar was filled to the brim. Then he looked at the class and asked, "What is the point of this illustration?”*

*Some offered suggestions. The truth this illustration teaches us is: If you don't put the big rocks in first, you'll never get them in at all." What are the 'big rocks' in your life?*

*Whatever they are, remember to put these BIG ROCKS in first or you'll never get them in at all. If you sweat the little stuff (the gravel, the sand) then you'll fill your life with little things you worry about that don't really matter, and you'll never have the real quality time you need to spend on the big, important stuff (the big rocks).*

* + - 1. **Covey Quadrants**

Steven Covey, author of the 7 Habits of Highly Effective People, created a quadrant system for determining priorities. The four quadrants are: Important and Urgent, Important and Not Urgent, Not Important and Urgent, and Not Important and Not Urgent. Invite the group to offer suggestions of the kind of things that might be found in each of the quadrants.

* + - 1. **Organizing Data**

Data takes many forms, most commonly paper, emails, and computer files; every one of these should have its place. Although we make every effort to reduce the amount of paper in our offices, it still exists. If you have a tower of paper somewhere in your office or on your desk, a simple system for handling it is like a RAFT that will help for smooth sailing to a better organized, clutter free workspace.

**R**–READ it **A**–ACT on it **F**–FILE it away **T**–TOSS it (recycle!)

* + - 1. **Using Technology More Effectively**

Invite the group to share which various technologies are used in their congregations and how faith development is served by that technology using the questions on the bottom of Handout 31. Tell participants that the Appendix contains a collection of online resources gathered from many sources. Remind the group that there are frequent threads and the archives from both the Reach list and the LREDA list as well as recommendations by regional and UUA staff.

**FIVE MINUTE BREAK**

**Healthy Boundaries (15 minutes)**

**Materials**

Handout 29, LREDA Code of Professional Practices

[Life on the Mobius Strip by Parker Palmer](https://www.youtube.com/watch?v=Qo00-zidiTQ&feature=youtu.be)

**Description**

Read the piece “The Only True Possession” to the group:

*I walked with my friend, a Quaker, to the newsstand the other night and he bought a paper, thanking the newsman politely. The newsman didn’t even acknowledge it.*

*“A sullen fellow, isn’t he?” I commented.*

*“Oh, he’s that way every night,” shrugged my friend.*

*“Then why do you continue to be so polite to him?” I asked.*

*“Why not?” inquired my friend. “Why should I let him decide how I’m going to act?”*

*As I thought about this incident later, it occurred to me that the most important word was “act...” My friend acts toward people; most people react toward them. He has a sense of inner balance that is lacking in most of us; he knows who he is, what he stands for, how he should behave. He refuses to return incivility for incivility because he would no longer be in command of his own conduct.*

*... Nobody is unhappier than the perpetual reactor. His center of emotional gravity is not*

*rooted within himself, where it belongs, but in the world outside him. His spiritual temperature is always being raised or lowered by the social climate around him, and he is a mere creature at the mercy of these elements. Praise gives him a feeling of euphoria, which is false. Because it confirms his own secretly shaky opinion of himself. Snubs hurt him, and the merest suspicion of unpopularity in any quarter arouses him to bitterness. A serenity of spirit cannot be achieved until we become the masters of our own actions and attitudes. To let another determine whether we shall be rude or gracious, elated or depressed is to relinquish control over our own personality, which is ultimately all we possess. The only true possession is self-possession.*

by Sidney Harris from *Pieces of Eight*

While it is not an easy task to keep the words and actions of others from determining our behavior, it is critical for those in roles of religious leadership. If we give the message that we can be so easily swayed by others, we lose credibility as models for our faith. We started this conversation last session when we talked about self-management and differentiated leadership.

**Large Group Discussion**

Part of the pre-work for this session was watching the Parker Palmer You Tube Video, Life on the Mobius Strip.

* + What resonance does this video have for you?
  + What insights did you have as you watched it?

**Community Read**

In addition to the personal work we do to maintain healthy boundaries, the professional organization for religious educators, LREDA (Liberal Religious Educators Association), holds all members to the high standard found in the LREDA Code of Professional Practices. Have individuals read each of the sections found in Handout 29.

**Delegation (20 minutes)**

**Materials**

Handout 30, About Delegation and Handout 31, Delegation Role Play

Slides 22-25

**Description**

Say something like:

*One of the important ways we maintain healthy boundaries is to step away from tasks that do not require the expertise or presence of a professional. Delegation involves passing responsibility for completion of work to other people. In this section, we’ll examine the reasons you should delegate, how to delegate, failure to delegate and what should not be delegated.*

Show slide 28 or share your screen and using a word document, type in the answers that participants offer to questions.

Brainstorm with the large group on why we need to delegate; record answers in the chat box. Leaders may want to point out some of the following if not generated by the participants:

* + Increases effective time management
  + Taps other people’s knowledge, skills, abilities, and characteristics
  + Shares responsibilities
  + Decreases costs
  + Avoid becoming indispensable
  + Help church members develop
  + Reduces stress and burnout
  + Increases proactive leadership, decreases reactive responses.
  + The No.1 reason that we as church staff and leaders need to delegate is that delegation helps increase the commitment to the RE program and the church. It is worth all the effort!

Say something like:

*We just created a list of the reasons why we should delegate and no one disagreed in theory. Why, then, in spite of all those advantages do you think so many religious educators are reluctant to delegate? What do you think might be some of the reasons for that?*

Invite answers from the group which may include some of the following:

* Lack of time
* I really enjoy
* Fear of surrendering control
* Fear of becoming dispensable
* Volunteers are not up to the job

Ask participants to take out Handout 30 and review the “triple A” criteria for delegation, saying something like:

*When you come to grips with the fact that you actually can delegate, consider the “triple A” criteria for effective delegation—assignment, authority, accountability.*

Show slide 29 and ask participants to briefly share examples of something they successfully delegated that included the “three A’s.” Next, ask for volunteers to read each of the seven steps in effective delegation found on Handout 30.

Say something like:

*It is important to know what and how to delegate. It is also wise to consider those tasks and projects that should not be delegated.*

Advance to slide 30 and have the group brainstorm a list of what should not be delegated; have one of the leaders record the responses in the chat box. Mention these if they do not come up:

* Tasks that include access to confidential information
* Managing conflict around the program
* Ensuring that risks are as minimal as possible.

**Small Group Discussion:**

Ask participants to take out Handout 31, Delegation Role Play. Use the Zoom breakout room feature to form pairs and select a scenario to role play an effective example of delegation. When all pairs are done, discuss the activity briefly in the larger group.

To close the section on delegation, read, or ask a volunteer to read, “Waitressing in the Sacred Kitchen” by Rev. Meg Barnhouse:

*I love for a waitress to call me “Hon.” It’s comforting. She doesn’t know me and I don’t know her, but we fit into well-worn, ancient categories: I am the Hungry One and she is the One Who Brings Nourishment from the Unseen Source. When I was younger, I worked as a waitress in Philadelphia and New Jersey. I learned useful things while serving food to strangers. I know how to rush around with my hands full, thinking about six things at the same time, which has stood me in good stead as the working mother of two small sons. I know that people are not at their best when they’re hungry. That knowledge helps me to understand world events. If the citizens of the world were well fed, we’d have fewer wars and less mayhem.*

*The most helpful thing I grasped while waitressing was that some tables are my responsibility and some are not. A waitress gets overwhelmed if she has too many tables and no one gets good service. In my life, I have certain things to take care of: my children, my relationships, my work, myself, and one or two causes. That’s it. Other things are not my table. I would go nuts if I tried to take care of everyone, if I tried to make everybody do the right thing. If I went through my life without ever learning to say, “Sorry, that’s not my table, Hon,” I would burn out and be no good to anybody. I need to have a surly waitress inside myself that I can call on when it seems everyone in the world is waving an empty coffee cup in my direction. My Inner Waitress looks over at them, keeping her six plates balanced and her feet moving, and says, “Sorry, Hon, not my table.”* from The Rock of Ages at the Taj Mahal: Unquiet Meditations

**Planning for Action (10 minutes)**

**Materials**

* Handout 4, Preparation for Module Evaluation,
* Handout 5, Reflection Questions
* Handout 32, Planning for Action
* Slide 31

**Description**

Review any questions that have been posted to the parking lot/bike rack and respond as appropriate.

Remind participants to post their responses to the reflection questions after the session ends using these questions on Handout 5:

* If I were to delegate tasks from each of my major areas of responsibility, what might be the effect on the community and their commitment to faith development? What parts of my work do I absolutely want to keep for myself?
* What opportunities for being more creative in my administrative role are available at this time? What is needed to prepare those with whom I work for a change in this area?

Invite participants to spend a few minutes after the session reviewing their notes and reflections from all sessions of the module, considering any adjustments or changes they would like to make as a result of what they experienced over the course of the module. Ask participants to complete Handout 32 to develop an action plan and post on discussion board. Remind participants that in order to receive full credit for the module, all assignments must be posted before they complete the final evaluation (one week after the module ends).

**Module Review (10 minutes)**

**Materials**

Leader Resource 6, Module Topics/Goals

**Description**

Using the topics listed in the background and at the beginning of each session, share a reminder of what the module has covered. Invite additional questions, etc.

**Closing (5 minutes)**

**Materials**

Handout 4, Preparation for Module Evaluation Handout 5, Reflection Questions

Leader Resource 4, Song Sheet and Readings

**Preparation**

Review Leader Resource 6 with co-leader and make changes or additions as needed.

**Description**

Ask participants to post their responses to the reflection questions. Remind them that they have a week to complete the evaluation online and once submitted, they will receive a certificate of completion from the Renaissance Office within ten days.

Lead a closing reading, making sure to affirm participants for their participation. As appropriate, include acknowledgement of those for whom this is the 5th module; you may also wish to affirm first timers as well as anyone who has completed all modules.