

Report of the Congregations Come First (CCF) Team

January 26, 2008

The Congregations Come First (CCF) Team is a partnership of our UUA Board, District Presidents Association, Annual Program Fund Committee and UUA district staff and includes a parish minister and UUA national staff. As a task force of the UUA Moderator, the CCF Team has been charged to recommend systemic changes and influence culture and practices that will ensure a more equitable and effective allocation of resources to support our congregations in their missions. With no single center of authority and accountability, efforts to design and implement system-wide improvements uniquely challenge our greater Association. We are called to be good stewards of our resources. Our goal is to increase the effectiveness of our Association of Congregations.

After meeting several times, the CCF Team produced a concept presentation in the fall of 2006, which suggested a regional method of distributing and managing services to congregations and offered recommendations on a number of other matters related to equity and efficiency. We took pains to report first to our four partner groups, and to encourage dialog with each of them. We asked that District leaders (the District President, the UUA Trustee, the District Executive and the APF representative for the District) meet to discuss our concepts and decide how to share them with other leadership in their districts. Later our initial concept report was posted on the UUA website. We asked that the District leaders listed above provide feedback to the CCF in advance of our next meeting in February, 2007.

The feedback was voluminous. There were positive responses, and there was criticism. The CCF Team's concept presentation included significant changes in the system which some could see as threatening. Upon reflection we observed that our concept, though controversial, had sparked discussion and stimulated imaginations to consider how our system might be better.

It is evident that positive change is occurring in the system. We can be very effective in encouraging healthy change by asking questions and stimulating conversations. The remainder of this report addresses these changes and asks some questions for consideration by all of our leaders.

A Vision Consistent with Unitarian Universalist Values

We envision mutually supportive healthy congregations providing vital ministries to their members, their communities, and our world.

Effective and equitable structures and systems would advance this vision in accord with our covenant by:

- Increased connectedness and cooperation among congregations;

- Increased congregational participation in the life of our Association;
- Promotion of right relationship in funding systems and resource allocation; and
- A generous spirit of faithful stewardship.

Equitable structures and systems distribute resources so that no congregation is disadvantaged by location or historic arrangements.

Effective structures and systems provide appropriate, high quality, general and specialized services in a timely fashion in ways that yield positive impact on congregational health, vitality, and growth.

A deep sense of covenant leads to openness, accountability, innovation, and bountiful opportunities for UUs to apply their leadership, talents, and passion to the service to our movement.

The Promise and the Challenge

Here's what we're seeing: Significant innovation and initiatives are occurring, which increase the effectiveness of our Association's services to congregations, move us toward equity, and strengthen our covenant. We also see areas where we are "stuck" in old paradigms and patterns. Our observations lead us to raise specific questions about effectiveness, equity, and covenant.

Effectiveness

We affirm the UUA Administration and national staff for these initiatives in support of congregational effectiveness:

- + Articulating identity for our faith by creating the new DVD "Introduction to Unitarian Universalism"
- + Deepening our faith by publishing the new Tapestry of Faith curriculum online
- + Working to increase our rate of numerical growth by establishing a national growth plan, a growth consultation with ministers of the fastest growing congregations, and launching the new national marketing campaign.
- + Supporting ministers of color and the congregations that call them because diversity is key to our growth into the future.
- + Recognizing Breakthrough Congregations and helping others learn from them.

We affirm regional, district, and cluster initiatives to increase our effectiveness:

- + The five New England districts organized a regional conference on ministry and leadership in lieu of separate district conferences. This has become an ongoing event. Ballou Channing and Mass Bay District will be holding a joint spring event.
- + Metro NY, St. Lawrence, Joseph Priestley, and Ohio Meadville District staff worked together to create a successful new Leadership Institute.

- ✚ In several places, congregations have networked to develop statewide legislative ministries. California, Washington State, and Massachusetts have paid staff leading this.
- ✚ A new level of collaboration among our UUA, the district, and local congregations is helping our growth efforts.

and yet...

- ✗ We currently have just about 160,000 adult members, about the same number as 46 years ago. During that same time, the U.S. population has grown by 50%. In the last 20 years we have fared better, yet are still growing at a rate of just one person per congregation per year.
- ✗ In the last decade, 1.5% of our congregations (16), have accounted for 25% of our growth; about ½ of our congregations have grown and about ½ have declined.
- ✗ We have a part-time office for service to large congregations, but we have nothing comparable for midsize or small congregations, and yet congregations of all sizes are asking for more specialized services.
- ✗ While future-oriented organizations effectively develop and use networks -- multilateral collaboration that connects them not geographically, but according to interest and need -- we have little expertise in social networking or the technology that supports it.

and we wonder...

- ? How could we more effectively organize ourselves as we move into the future?
- ? What would the structure and accountability of our system look like to reflect growth as a priority?
- ? Will the initiatives listed above lead to systemic change?
- ? Are we changing quickly enough relative to changes in the larger society?

Equity

Looking at our Association landscape, we found several new ways district leaders have been working together to provide congregations with equitable access to financial, technical and personnel resources.

We affirm the following district initiatives:

- ✚ District presidents came together in the fall of 2006 to agree to an equal sharing of total benefits cost for co-employed staff. This action by the district presidents equalized the benefits costs among all our districts. In prior years, payment of the actual benefits costs was the responsibility of individual districts.

- ✦ The four districts of NRG [New Regional Group of St. Lawrence, Joseph Priestley, Ohio Meadville, and Metro New York], recognizing disparities of resources, developed and implemented a plan to share specialized staff in order to provide congregations equitable access to expertise.
- ✦ Several districts are investigating how to share district-focused software and IT support and systems.

and yet...

- ✗ In Southwestern UU Conference, a large geographic district, two full-time professional staff members and one full-time equivalent administrative position serve 76 member congregations and five emerging congregations. In the relatively smaller and more compact Joseph Priestley District, six professional staff (four full-time, two half-time) and two administrative (one full-time, one half-time) serve 64 member congregations and four emerging congregations.
- ✗ The ratio of district staff members per congregation ranges from 1:11 to 1:45.
- ✗ The amount that our UUA reimburses districts to support their offices ranges from \$23,000 to \$78,000 due to financial agreements dating back as far as 1982.
- ✗ -- On a "dollars per congregation" basis, the reimbursement ranges from less than \$500 to over \$1,600.
- ✗ -- On a "dollars per member" basis, the reimbursement ranges from less than \$4 to almost \$12 per member.
- ✗ While some districts are hiring additional specialized staff, another is requesting a line of credit from our UUA to pay its one staff person.

and we wonder....

- ? What if all congregations had access to resources in roughly the same ratio?
- ? What if all congregations had access to specialized staff and services based upon their needs rather than their location?
- ? Can we imagine a more equitable method to distribute money and other resources or share costs between and among districts?
- ? How would the structure and accountability of our system need to change for equity to be a reality?

Covenant

We affirm new collaborative efforts and partnerships, which remind us we are a covenantal faith.

Collaboration among congregations:

- + There are clusters working together for growth and/or starting new congregations in many areas: north Texas, Philadelphia, northern Connecticut and central Massachusetts.
- + Though their joint media campaign ended several years ago, the congregations in the Kansas City area continue to work together to develop new cooperative initiatives.
- + Ministers from congregations in Minneapolis and St. Paul collaborated to create a five-session lay theological education series, “Faithful Conversations”, for local lay leaders.
- + There are new social justice efforts that include one or more congregations in partnership with the UU Service Committee.

Collaboration across district boundaries

- + Prairie Star District’s online speakers/artists/musicians bureau is being expanded to the Central Midwest and Heartland Districts, in collaboration with the UU Musicians Network (UUMN).
- + St. Lawrence and Joseph Priestley districts are collaborating with the Annual Program Fund staff on joint requests for 2008 APF and district contributions.

Partnerships that cross traditional organizational boundaries

- + The Annual Program Fund Committee is creating new partnerships with groups including LREDA (the Liberal Religious Educators Association) and the staff of the Ministry and Professional Leadership staff group. The APF staff is consulting with Lifespan Faith Development about generosity and stewardship for children and youth.
- + In October 2008 the District Presidents Association and UUA Board of Trustees will work collaboratively to set ends (what good should be done for what folks at what cost) for our Association.
- + The Association-wide conversation on Excellence in Ministry is being guided by a new partnership that includes the Unitarian Universalist Ministers Association, UUA Board, Panel on Theological Education, the UUA Administration, and staff from Ministry and Professional Leadership.

Possible system-wide indicators of cultural change

- + Starting in 2004, increasing numbers of congregational presidents responded to Gini and Bill’s invitation to come to General Assembly. A growing number of presidents see their GA attendance as part of their congregation’s relationship to the Association.
- + Congregations throughout the Association stepped forward to create relationships in support of our Gulf coast area congregations that were affected by hurricanes Katrina and Rita, providing financial help, leadership support, chaplaincy and pastoral care, as well as hands-on assistance – the spirit of our covenant moving among us.
- + Significant language changes:
 - + More Unitarian Universalist leaders are talking about “**our** Association” rather than “the UUA” or “Boston.”

- + The UUA Board voted in 2004 always to describe General Assembly as “a meeting of congregations.”
- + Conversations among UU leaders reflect a growing understanding that our Association refers to the member congregations, not the board or staff.

and yet....

- ✘ At General Assembly 2004, two-thirds of the over 300 congregational presidents in attendance reported that they felt unconnected to neighboring congregations, the district, and our UUA; they felt isolated.
- ✘ When a large church partnered with the UUA to start a new congregation, some of the area churches worked to stop the initiative, concerned that a new congregation would compete for members.
- ✘ Congregations in one district were impacted when a large congregation chose to pay its APF contribution but not to pay its district dues after an unanticipated expense. A consequence of this choice was the unpaid leave of several district staff members.
- ✘ A congregational president knew of a neighboring UU congregation, three miles away, that was having difficulty with its annual canvass. The congregational president and his board discussed the troubles of the neighboring congregation without any sense whatsoever that they might offer any sort of assistance -- not necessarily financial, but moral support or perhaps stewardship resources based on their own recent successful canvass. This is not an unusual story.
- ✘ While the majority of congregations contribute fully to our Association and their districts each year, some congregations pay only a portion of their APF contribution and yet expect or need full services.

and we wonder...

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| <ul style="list-style-type: none">? What is the quality of relationship in our Association of Congregations?? Are our relationships covenantal or contractual?? How could we strengthen our connections?? What if we were an Association of Congregations in which all congregations embody our bond of connectedness with each other so that we advance our common purpose and no congregation is alone in its work?? While the number of positive examples is growing, do they represent systemic collaboration, or do they simply rely on the personalities and preferences of our current leaders?? How do we structure cooperation and covenantal relationships into our accountability? |
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What We Ask of You

- ✚ Consider and invite conversations about the questions raised in this report.
- ✚ Join the conversation at CCF workshops at the Large Congregation Conference and at General Assembly.
- ✚ Identify ways or methods by which we might live out our covenant more fully and with deeper meaning.
- ✚ Share your stories of how your congregation or district is addressing these values so that others might learn from your experiences.

Please send your comments to ccfcomments@uua.org.

The CCF Team:

- ▲ Gini Courter, UUA Moderator, Co-convener
- ▲ Rev. Harlan Limpert, Director for District Services, Co-convener
- ▲ Roger Comstock, UUA Trustee, Northeast District
- ▲ Nancy Heege, District Executive, Prairie Star District
- ▲ David Friedman, UUA Trustee, St. Lawrence District
- ▲ Rev. Bill Zelazny, District Executive, Ballou Channing District
- ▲ Joe Sullivan, District President, Southwestern Conference, a district of the UUA
- ▲ Elyse Reznick, District President, Joseph Priestley District
- ▲ Barb Brown, General Chair, Annual Program Fund Committee
- ▲ Laurel Amabile, Director, Annual Program Fund
- ▲ Rev. Mark Gallagher, Minister, Michael Servetus Unitarian Universalist Church, Vancouver, WA
- ▲ Rev. Stephan Papa, Special Assistant to the UUA President for Growth Funding
- ▲ Eva Marx (note taker), UUA Trustee, Ballou Channing District

Appendix

The Development of District Services and Prior System Studies

(How did we get into the situation we have today)

Prior to the consolidation that formed the UUA, the American Unitarian Association (AUA) had District Executives (DEs) in each District. The Universalist Church of America (UCA) was organized in State Conventions – each had a Superintendent. After consolidation, the UUA kept the AUA District organization and placed a full-time, UUA-paid District Executive in each District.

In 1970, all District Executives were terminated (on the same day) as the result of a severe budget crunch. Shortly thereafter six of the same men (they were all men) were rehired to establish the Interdistrict Representative system, with each staff member serving several districts. Four Districts chose at that time to hire and pay for their own staffers.

In 1982, the study referred to as “D2R2” was completed, calling for 12 regions of equal size and membership. It was not adopted.

In 1983, the UUA initiated a plan to install co-employed DEs in every District. Implementation was planned over a six year period. Most Districts shared costs with the UUA on a 50-50 basis. A few Districts paid a greater share. Sharing percentages and the basis for the “Other costs” figure were derived during negotiations, and were inequitable.

By 1990, all Districts had a District Executive on a cost-shared basis. Most were fulltime. Some shared that person with another District.

In the 1990’s Districts began co-employing additional staff referred to as Program Consultants. In most cases, the District paid 75% of the cost, while the UUA provided 25%. Duties vary according to District preference.

In about 1992, the District Presidents group began agitating for a voice. They first asked to be allowed to vote at GA. This plan was not approved by the delegates.

In 1997, Moderator Denny Davidoff convened the first Summit meeting of District Presidents, Trustees and DEs with the Moderator. Subsequent Summits were held in ’99, ’02, ’04 and ’05. The last summit authorized the effort now called Congregations Come First. During this time, several attempts were made to equalize services provided to the Districts and to rationalize the “Other Costs” figure. Also, the formulas for determining Fair Share and the District Grants were regularly reevaluated. No system has been found for the APF which has been considered fair by all.

Three other studies bore on the question of how to achieve the most equitable and efficient delivery of services from the UUA to its member congregations. These included: Structure and Services (2001), mainly focused on the location of staff; “To Be of Use” (2002), an effort to codify District services to congregations; and a Leadership Development conference (2003) sponsored by District Services which resulted in UUA efforts to catalog trainings done, and to try to fill the gaps. Rev. Harlan Limpert was hired to staff the UUA office of Lay Leadership Development.

Commentary

There have been many efforts to address the perceived inequities in this system over the years, starting as early as 1982. All of the past efforts have been ineffective in addressing these issues in large part because our organization has connected governance and service delivery at the District level. There is no group within our structure that has control over both governance and service delivery.

The structure of our UUA is complex. Districts were created at the time of merger of the American Unitarian Association and the Universalist Church of America through political compromise without regard to size, geography and number of congregations. Those same districts were empowered to elect members of our UUA Board of Trustees, and to share the burden of service delivery by our UUA to their member congregations. Independently, the General Assembly was empowered to elect the UUA President, Moderator and Financial Advisor; to elect membership in the Nominating Committee, the General Assembly Planning Committee, the Commission on Social Witness and Commission on Appraisal; and to reflect the will of our congregations in the governance of the Association. The Unitarian Universalist Ministers Association is an independent organization, though ministers serve on the UUA staff and Board and settled ministers have a vote at General Assembly.

The CCF Team was created to provide an eagle’s eye view of the system. The Team chose to focus on service delivery and funding, and not to deal with governance. Our view is long-term, extending back through seven administrations and forward for the next few. The problems we feel charged to address are the result of organizational decisions taken many years ago and not a reflection on the work of any one of the past administrations. In fact, much good work has been done and is being done despite the organizational obstacles we face.