

UNITARIAN UNIVERSALIST ASSOCIATION of Congregations



Leap of Faith

A Pilot Project of the
Unitarian Universalist Association

2010-2011 First Cohort Evaluation Report

Conducted by

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I. INTRODUCTION

“Leap of Faith: Becoming the Religion for Our Time” was created as a pilot of the Unitarian Universalist Association of Congregations (UUA) in mid-2010 to “implement a pilot that supports congregations poised for significant numerical growth by facilitating learning communities and mentoring relationships among healthy congregations.” With a budget of \$163,000 for the first year (including evaluation expenses), the program sought to pair eight “aspiring” congregations with eight “mentoring” congregations in the hope that “participating congregations will demonstrate statistically significant growth in membership and qualitative improvements in ministry and pilot effectiveness.”

The Leap of Faith (LoF) pilot objectives were laid out as follows:

- Develop congregational leadership skills necessary for culture change.
- Develop compelling congregational narratives that sustain growth in years to come.
- Develop cross congregational relationships of learning, counsel and support.
- Develop strong working relationships between participating congregation and UUA staff.

During the first few months of the program, eight congregations were identified by UUA Congregational Life Staff based on the following criteria:

1. Metrics of Growth in recent years
2. Excellent ministerial leadership
3. Culture of boldness and innovation
4. Reputation of congregational health and generosity
5. Compelling sense of mission and/or clear purpose
6. Vital worship experience
7. Vital spiritual development/faith formation
8. Strong staff team
9. Adequate infrastructure to support growth
10. Lay leadership embraces this opportunity
11. Relationship with and awareness of surrounding community

Priority was given to congregations regionally accessible to one another so that travel and communication costs could be minimized. Congregations were asked to assemble a team of five leaders to include the full time settled minister, senior lay leader, religious educator, and key change agents in the congregation. The participating congregations were also asked to (1) participate in a launch conference in New Orleans in October 2010, and (2) covenant to active participation, documentation and evaluation, and assistance to future congregations.

In October 2010, two consultants, Susan P. Curnan and Della M. Hughes,¹ were engaged as evaluation and learning partners for the duration of the pilot (slated for three years). They participated in the launch conference and introduced their appreciative approach to evaluation as a working

¹ Curnan, Professor and Center Director, and Hughes, Sr. Fellow, work at the Center for Youth and Communities, Heller School for Social Policy and Management at Brandeis University.

partnership designed to help prove and improve the pilot's effectiveness and how evaluation could be used as a management and learning tool. They also introduced use of a logic model to identify who the pilot is designed to serve and the long-term expected impact, as well as shorter-term outcomes, strategies and underlying assumptions.

The evaluation of LoF began with the development of a logic model for the pilot. The evaluation and learning team worked with the LoF Steering Committee over the course of three sessions to finalize it. The logic model was then introduced to congregations by members of the Steering Committee. While it did serve effectively as the basis for the evaluation design, it came too late to shape the first cohort's work.

Eleven of 12 congregations participating in the Leap of Faith (LoF) pilot were interviewed for the evaluation. Interviews were conducted with ministers and Board Presidents, where possible, and often included one or two lay leaders who had been involved in LoF.

The interviews were designed to get the minister and key lay leaders involved in the LoF pilot to reflect on past year's accomplishments, challenges and lessons learned and to gather feedback and recommendations for improving the pilot and for next year's group. *Note that this evaluation did not involve interviews of the LoF Steering Committee, so this report includes only participants' perspectives.*

Questions linked to the LoF logic model included:

- How has participating in LoF affected your congregation? What do you think your congregation got out of the experience and what changes have you noticed?
- What do think were the key elements to your experience and to changes made?
- What did you learn about the role of leadership?
- What did your congregation gain from being part of a mentoring-aspiring congregation partnership?
- What are the key elements of a successful mentoring/aspiring congregation partnership?
- What were some of the challenges to this relationship?
- What were some of the challenging aspects of participating in LoF?
- What recommendations do you have for LoF leadership and for the next group of participants in LoF?

Across the board, congregations were glad to have participated in LoF and believed that it was a good idea, had merit, and was worth continuing. One congregation noted that by strengthening connections between congregations, LoF is "good for the movement." Another aspiring congregation put it this way, "We came to realize that our problems were not only ours... that others were struggling with similar problems. Not only did we realize we were not alone but that there were ways we can work together to solve our problems." Although congregations also noted frustrations and challenges along the way, the majority of congregations felt it was worth the effort. Several congregations expressed gratitude to the UUA and partner congregations for all the hard work, effort and commitment that was clearly demonstrated. An aspiring congregation explained that those leading the pilot both at the UUA and within the congregations were "there in mind, body and spirit and were clearly committed to the program and its goals."

The following, Section II, synthesizes participant responses about the benefits of participation in LoF and changes made since being engaged. Section III provides an overview of what pilot participants think is necessary for launching a successful LoF change initiative. Section IV summarizes the LoF congregations' ideas regarding critical elements for successful implementation. Finally, Section V

concludes with congregations' recommendations for improving future LoF initiatives and Brandeis Team reflections.

II. EVALUATION FINDINGS

Benefits of Participation and Positive Outcomes

Congregations interviewed cited an array of benefits and positive outcomes that resulted from participation in Leap of Faith. Aspiring congregations noted **intangible benefits of participation** that affected the health and vitality of the congregation. In addition, aspiring congregations shared that visiting their mentor congregation encouraged them to make **tangible changes** to support growth. Some of these tangible changes were immediate, concrete and specific; other changes were longer-term changes that were still in process during the time of the interview. In a few cases, aspiring congregations noted changes in thinking that affected the broader culture of the congregation. Mentoring congregations also gained from the experience. This section ends with a summary of how mentoring congregations benefited and what they learned from participating in Leap of Faith.

A. How did participation in LoF affect the health and vitality of their congregations?

Aspiring congregation teams interviewed talked at length about the **intangible benefits of participation** that affected the health and vitality of the congregation. Though difficult to measure and quantify, many respondents explained that these intangible benefits had the most profound affect on the congregation and were the most important outcomes of the Leap of Faith initiative. These intangible benefits included: 1) the impact of the invitation 2) moving from talking to action, 3) enlivening and motivating lay leaders, 4) deepening relationships, 5) boost in motivation and confidence, 6) the realization that there is no one right pathway, 7) an affirmation of what they were doing well and the importance of appreciating differences, 8) increased awareness of the role of history and oppression, and 9) learning to take risks.

▪ THE IMPACT OF THE INVITATION

Several aspiring congregations noted that the simple act of being invited to participate was a positive experience for their congregation because it demonstrated that they were a church the UUA was willing to invest in. The invitation showed belief in the congregation and where they were headed. One respondent noted, "This psychologically did a lot. We were not denominationally very involved, and so it mattered that others were paying attention to what we do." Other congregations were motivated by the boost of confidence that came with the invitation. They were encouraged by "the UUA message that they had an eye on us and thought we had the potential to do this." A respondent from another congregation felt that the invitation was critical to beginning the process of self-reflection and evaluation. "It was great to have someone ask us to take a look at ourselves. Evaluating ourselves from a critical perspective. What we would like to work on."

The invitation to participate also impacted mentoring congregations in positive ways. One congregation felt that the greatest benefit came from being asked to serve as a mentor. "It was a great pat on the back to be asked to do this. It's energizing to be told that you're doing something well." Another noted that being chosen as a mentor brought a new sense of perspective to the staff and leadership of the congregation. "The recognition that we were a successful congregation made us take a hard look at what we do and how we do it. We all grew in appreciation of our success." Most mentoring congregations echoed this general sense of accomplishment and achievement at being selected for this pilot.

- **MOVING FROM TALKING TO ACTION: THE PUSH TO SET GOALS**

All of the aspiring congregations shared how participating in LoF moved them to the next level of action no matter where they were on their journey. For some this meant a growing energy to be proactive about growth rather than “just talking about growing or sitting and waiting for it to happen.” Another aspiring congregation noted that their style of decision-making had been more intuitive and that participating in LoF encouraged them to look more strategically at what they were doing and where they wanted to go in more formalized ways. Several congregations noted that LoF provided an opportunity to organize around a common goal or adaptive challenge and then to do things in common. Taking this time to “pull the wagons around” and reflect and go through the process of determining a common goal and adaptive challenge helped congregations to “stay on track and not just let it drop because adaptive challenge can be tough to navigate.”

- **ENLIVENING AND MOTIVATING LAY LEADERS**

A critical benefit that all aspiring congregations noted was the way that participation in LoF “enlivened” and “motivated” lay leaders to become more involved and committed to the congregation. Though difficult to measure, many aspiring congregations felt this was a significant benefit of participation in LoF. For example, one congregation had a former Board member on the periphery, who came back from the New Orleans conference “all fired up” and has since taken a leadership position again. Another aspiring congregation noted that several LoF team members who were newer to the congregation “made huge learning curves. LoF brought them into the inner circle of the congregation faster.” In another example, three members of the LoF team also participated in a Build Your Own Theology class within their congregation. This process deepened their knowledge about being a Unitarian Universalist and increased their commitment to become future leaders in the congregation.

- **DEEPENING RELATIONSHIPS**

Particularly in the cases of strong matches between mentoring and aspiring congregations, congregations experienced a deepening of relationships and connection to the broader UU community. One aspiring congregation explained, “It was good for our community to connect on a personal level with other UU churches. Its one thing to know they’re out there, but another to have a real human connection. It’s easier if you have a question to reach out and connect once you have had a meeting face-to-face.” Several congregations noted that they had built stronger connections and friendships across congregations both with lay leadership and between ministers. One congregation noted, “Our churches have relationships they didn’t have before. We are more likely to call on each other or seek each other out at UUA events.” In another example, an aspiring congregation was hiring consultants and proactively called their mentor church for advice on how to select consultants. The mentor congregation connected them with a lay leader from their congregation to talk it through. The mentor congregation noted, “This experience opened up communication between our churches. Now there is a relationship there to draw upon and so we are more likely to pick up the phone to call each other.”

Most congregations fully expected that the relationships formed through LoF would be lasting. One minister stated, “[Our mentoring congregation] is stuck with us now!” This aspiring congregation has invited their mentor to visit to help them continue to work on things. In the meantime, they have kept lines of communication open through questions, phone calls, and emails. Several other congregations have planned or are talking about similar reciprocal visits. In most cases, the relationship between congregations is still going on, as one lay leader described: “We definitely don’t see this as something that is finished. Individual staff and lay leaders are in regular contact through email and Facebook. Personal contacts were made at the site visit and ideas continue to be shared.”

- **BOOST IN MOTIVATION AND CONFIDENCE**

Although most aspiring congregations noted that positive changes may have happened without the LoF, the experience did provide a boost in motivation and confidence that led to things happening more quickly and with fewer missteps. One congregation noted that the site visit to their mentoring congregation motivated them to take action immediately upon return. Another congregation noted, “Many of the changes we made may have happened on their own. But if we take a balcony view, I don’t think it would have happened so quickly. The boost we got from this experience and from the UUA message that they had an eye on us and thought we had the potential to do this, that made a difference.” Another aspiring congregation explained that though they could have taken action without LoF, the experience helped them and led them to use appreciative inquiry and formalize some of their goal setting, which led to more immediate action steps.

In particular, the LoF experience boosted congregations’ confidence in talking about taboo or difficult topics. For example one aspiring congregation returned from the site visit and tackled the “sacred cow” issue of space and the building. Seeing first hand the possibilities for using space gave this aspiring congregation the strength to talk about their own building and the fact that it was not conducive to their vision of growth. Discussing moving from the historic building had previously been a taboo subject and so had blocked productive discussions about how space issues were affecting the quality of experience. After the site visit, Board and lay leaders were able to initiate creative discussion about the building and space and found that “bold thinking began to happen” as a result.

Other difficult and taboo topics that aspiring congregations were able to open up for creative discussion included being more explicit about spiritual and religious beliefs in the community, being more direct and bold in fundraising efforts, and being more aware of the role of history and oppression and how this impacts the ability to be truly welcoming of multi-culturalism.

- **REALIZATION: THERE IS NO ONE RIGHT PATHWAY**

An unanticipated benefit of the LoF experience was the realization that there was not a single pathway toward effective growth. Several aspiring congregations noted that they went into the process expecting to gain very specific information from their mentor congregation about how to tackle a specific goal, only to find that the way their mentor congregation had addressed that same goal or issue would not work for their congregation. Three aspiring congregations noted that they went to the site visit to learn how to change or improve a certain area, such as developing satellite churches or improving social justice responses, and realized that what their mentor congregation was doing, though effective, “didn’t fit with our community” or “wasn’t going to work for us.”

Aspiring congregations found a great deal of freedom in learning that growth and change required a lot of trial and error based on specific local circumstances. What works in one congregation may not work in another and that “that is ok.” One aspiring congregation put it this way:

“There are different ways to approach growth and outreach to community. One expert says this, one congregation says this, one book says this. It’s all different things and a congregation can get stuck in paralysis when there are all these different possible pathways and you are not sure which one to take. It was helpful to go to a congregation and see it in action and in context. Each pocket of our congregation (social action, financial stewardship, governance) had gotten stuck at the crossroads wondering how to do these most effectively. We were then able to see from our mentor congregation that it is ok to just pick what you think might work and try it out. We learned there is no magic to it and no one right answer. They just tried something on their own and if didn’t work, then they moved on.”

▪ AFFIRMATION OF WHAT DOING WELL AND APPRECIATING DIFFERENCES

Another unanticipated benefit of the LoF experience for aspiring congregations was the opportunity to reflect on the things they were already doing well. It was affirming to go to churches as lively and vital as the mentor congregations and see reflections or differences that also highlighted the unique strengths of aspiring congregations. One aspiring congregation noted that during the site visit they realized that “at some level we were already doing a lot of the things we saw during the site visit. We realized it was more about tweaking what we do than about wholesale re-vamping, and this was affirming.”

Several congregations noted that discovering differences across congregations was also valuable learning. One congregation explained, “When you go into this, you have to remember that you are going to see things you don’t agree with and that is ok. We also need to learn to be ok with the fact that there are things we are not going to agree about and there are some things we will not want to bring home and duplicate and this is also valuable learning.”

There was a growing sense of appreciation from many congregations of the unique strengths in each congregation and the ways congregations could all learn from one another. Though coming face-to-face with differences in history, demographics, size, use of space, and theological feel, several congregations noted that they were able to reflect more clearly on what they most appreciated about their congregation, rather than on simply what needed to change.

▪ INCREASED AWARENESS OF THE ROLE OF HISTORY AND OPPRESSION

In the cases where congregation matches encompassed differences in history, demographics, region, culture, and current challenges, congregations gained an increased awareness about how history and local context shape a congregation. Several congregations noted that an important part of the learning process was becoming more aware of the impact of history and the role oppression as critical to more fully understand a specific congregation’s challenges in context and to become better equipped at becoming truly welcoming of difference. One aspiring congregation noted that it was important for differences in culture to be explicitly addressed. For instance, a girl who had recently joined this UU church found that several families in her community would no longer allow her into their house. Community attitudes and prejudices have had a profound impact on the congregation and need to be understood in order to more clearly see the strengths and challenges of this congregation in context.

“I had a pronounced realization that how people see sanctuary is dependent on where they sit... People of elite classes see a beautiful church and a culture that appeals to them. Other cultures see a monument to oppression. We need to see those differences and grapple with those in ways that are positive so we can grow positively and be truly more inclusive and multi-cultural and this takes responsibility.”

Another respondent explained,

“[Our mentor congregation’s] history is so different from ours. It was important to get out of the place where I’ve lived for so long to be able to see more and to see cause and effect over time... This understanding of seeing how history has shaped communities and congregations and individuals is important to becoming really truly welcoming and multicultural church. Understanding this intellectually is one thing but having the emotional intuition to see it, understand it and do something about it – it takes practice to develop it – to really see the impact of history and oppression in the here and now. It shakes you up and makes you uncomfortable. It is not an enjoyable experience... [Our mentor congregation] has a painful history around oppression and because it is still visible in the

monuments and attitudes of people of today, they are more open and able to talk about it... They are clear about history and the impact it has had. They highlight it and bring it to the people... They are able to say, 'See how we hurt one another when we treat each other like we are not all connected.'"

These congregations that came face-to-face with the power of prejudice and oppression noted that awareness was the first step in more fully appreciating differences and increasing one's ability to sit with the discomfort of the effects of oppression. One respondent noted, "We need to hold both the wonderful and the painful together" and in doing this we can reduce the tendency to "cover up and deny our collective heritage" in oppressing others. This process of becoming more aware of where a group is privileged and where a group is oppressed makes it possible to "see more clearly and to take responsibility for historical connection to oppression." This, in turn, makes it easier to "see how we may still close out and oppress others."

▪ **LEARNING TO TAKE RISKS**

Many aspiring congregations also noted that LoF encouraged them to take risks and to persevere. One aspiring congregation explained that since participating in LoF, they were more willing to "go out on a limb and make change," and that they returned from the site visit ready to "re-evaluate how we have done things and traditionally employed resources. No longer are we saying, 'This is the way we have always done it.'" Another congregation was reminded that there is much to learn from failing. Their mentor congregation was not afraid to own their failures and learn from them, and this was inspiring. A respondent from the leadership team of the aspiring congregation explained, "[Our mentor congregation] is always trying things, and if they don't work they don't give up or feel badly. They learn from it and move on."

In another example, one aspiring congregation noted, "LoF emboldened us not to give up so easily." In the past, the congregation had tried some new programming ideas and when it didn't take hold, they lost confidence and thought, "we don't have the magic. We can't do this." During the site visit with their mentor congregation, the team noticed that though they had done a lot of things right, like ensuring solid lay leader champions to assist in ensuring programming took hold, the critical element seemed to be that the mentor congregation "stuck to it." This experience convinced the aspiring congregation team that they *did* know what to do. They just needed to go back home and persevere and believe that it could grow into a more exciting part of their programming over time.

B. Changes Made Since Being Part of the Leap of Faith Initiative

Although most congregations interviewed had not yet experienced significant growth in numbers, congregations had made changes that supported and encouraged growth. Some of these changes were immediate, achievable changes made upon return from site visits. Other changes were longer-term changes connected to goal setting and addressing adaptive challenges. In addition, several congregations noted that they had experienced paradigm shifts in thinking and noticed changes in the culture of the congregation that respondents attributed to the LoF experience.

▪ **IMMEDIATE CHANGES**

All of the aspiring congregations interviewed noted that visiting their mentor congregation gave them encouragement and motivation to take some immediate actions upon their return. Congregations noted that they wanted to build on the momentum and enthusiasm of the goal setting and site visit process by making some immediate and achievable changes that could be "celebrated" and would "show some movement." Immediate changes occurred in the following areas: 1) Increasing use of congregation's mission and UU values, 2) Membership, 3) Religious Education, 4) Staffing and 5) Programming. Examples of specific changes made included:

- 1) Increasing knowledge and communication about UU beliefs and congregation's mission
 - Created a short guiding statement (a shorter version of our covenant/mission) to use for publicity and that individuals could memorize and be able to better and more clearly explain what our church is all about.
 - Across committees, developed more proactive explanation of who we are, what we believe, and connection to UU history with focus on what we are teaching rather than what we are not teaching.
 - Followed the example of the mentoring congregation that had a clear mission made up of three simple words that were easy to remember. The mentor uses those words everywhere and incorporates them into every aspect of the church. We took that idea, adapted it, and began using our three words in materials and services.
 - Offered training to key lay people in UU theology so can more effectively articulate who we are and what we believe.
 - Created guiding statements/mission statement that can be used to more effectively explain who we are and what we are about.
 - We're launching an 18-month strategic planning process using consultants. This was directly inspired by Dallas.
- 2) Membership
 - Raised some expectations for membership process including requirement classes before
 - Created new volunteer position for membership and recruitment
 - Welcome visitors earlier in more formalized way by adding a drop-in Exploring UU class for guests who are not ready to commit to bi-monthly class.
 - Improved marketing and design of membership packets and folders.
 - Put together a consistent and clear set of steps for handling visitors and new members. Created or changed our brochures, materials, new member classes.
- 3) Religious Education
 - Reinvigoration of young adult programming started immediately upon return from site visit
 - Piloting a theme-based month of ministry to move toward further integration of RE into all services in church
 - Created new volunteer positions for RE registration to more effectively and efficiently welcome new members' children into RE program
- 4) Staffing
 - Created new position of religious education assistant and hired at 20 hours per week.
 - Created new position of membership assistant to assist Director of Congregational Life.
 - Split Administrative Position into two part-time positions to more effectively manage staff departures and increase continuity over time.
- 5) Programming
 - Re-vamped Young Adult group based on ideas learned at site visit. We now have 20-30 people attending our Young Adult meetings.
 - Ramping up Small Group programs in our congregation and attempting to re-invent that part of our church life based on ideas and inspirations gained at site visit.

▪ LONGER-TERM CHANGES IN PROCESS

Aspiring congregations noted that additional changes, sparked by participation in LoF, were in process and required a longer period of time to achieve and measure results. As one minister noted, “some changes take longer and are part of a journey.” Being a part of LoF helped motivate aspiring congregations to begin or continue journeys of change or improvement and may have helped aspiring congregations move further and faster than if they had been journeying on their own. In addition, participation in LoF improved congregations’ skills in anticipation and more effective forward planning for longer-term changes. For example, one aspiring congregation saw some of the stretches in their mentor congregation’s systems similar to the stretches they too were experiencing, and this reaffirmed the importance of staying on top of growth. The minister noted “we have done our best work when our staff was not overburdened. We knew we needed to get in front of the growth. We ended up fundraising in the middle of the year to fund the assistant DRE position. LoF was an inspiration not to wait. To anticipate and keep moving the ball down the field.” Several congregations also noted that that feedback from mentor congregations, reduced missteps and mistakes along the way in making longer-term changes.

Congregations noted longer-term change processes in the following areas: 1) technology and communications, 2) physical space, and 3) governance and leadership.

1) Technology and Communications

- Improving technology in our worship space. Participation in LoF encouraged us to proactively apply for a grant of \$6-7 k that has been awarded and will allow us to take what we learned from our mentor congregation around audiovisual and technology for worship.
- Consulting with church sound technician who works for one of the larger churches in our area to assist in technology plan for communications with the congregation.
- Experiencing first hand how mentor congregation used technology was a “kick in the pants” for one aspiring congregation. Created a new communications committee, creating Facebook presence, and motivated to accomplish technology goals that congregation has only been thinking about.
- Upgraded sound system and is now looking into using video monitors to give a more close-up, engaged view for all who attend services.

2) Physical Space

Several congregations noted that seeing the physical space of their mentor congregation opened up their thinking about space. In particular, for congregations that had more typical, historic worship space, the creative use of space by mentor congregations inspired discussion about how to change and expand space to better meet growth needs and create a vital worship experience. In several cases, this led to forward thinking about capital campaigns for physical space and thinking more strategically about what to do with resources. One minister explained, “Now, we have the opportunity to create more of a long-term vision around space.”

3) Governance and Leadership

Several congregations discussed longer-term changes occurring in governance and lay and staff leadership. One respondent noted that these kinds of changes were taking longer and “we are still on the journey of deciding what governance model is going to work best for us, but I think we are further along than if we hadn’t participated in Leap of Faith.” Another congregation shared that they had learned about the importance of letting staff lead. Several congregations noted the importance of staffing for growth and coupling this with

connecting with lay leaders. One respondent noted that vital, effective programming that works over the long haul ultimately needs to be member-driven. This congregation was re-invigorated to encourage member-“champions” to grow programming as a key aspect to these longer-term changes taking hold and successfully leading to growth.

- **PARADIGM SHIFTS IN THINKING/ CHANGES IN CULTURE**

The majority of aspiring congregations interviewed noted that LoF led to changes in the questions they were asking as a congregation. Rather than ask, “Do we really need to do this?” congregations were now saying, “We know we want to move in this direction, how are we going to get there?”

Several congregations noted that participation in LoF led to paradigm shifts in thinking and changes in culture. One respondent explained, “Now we’re asking the right questions. We weren’t asking the right questions in the beginning and now we can see that. We knew we wanted certain outcomes and now we have a clearer understanding that you get there by asking the right questions – how to get to those outcomes? Often there are steps along the way.” Another ministers put it this way; “Our questions are now more about how than if. That was a shift for us.”

There were other changes in thinking that respondents attributed to the LoF experience. One respondent interviewed noted a growing “shift in recognition that we are not just about ministering to self. Visiting [our mentoring congregation] created a change in thought for us... that we have as a priority to reach out to the community. This recognition has changed our focus and increased our motivation to intentionally move in that direction.” Another congregation interviewed noted that the desire to be ahead of the growth was now becoming a part of the culture of their church. Members of the leadership team had more awareness of the growth process they were in and were making decisions based on this increased awareness. Another congregation shared that working actively and in common on the congregation’s adaptive challenge led to new and more intentional ways of working together across committees. This led to a deepening of relationships and synergies in plans.

In several cases, visiting mentor congregations broadened what was possible. One minister explained, “To be onsite with a church who had gone through the transition we were facing helped us to think bigger. We have always been more linear in our strategic planning where we do this and then this and then this. [Our mentor congregation] faces challenges as they go. We were exposed to a different way of strategic planning and that shook up our thinking and gave us other palates from which to paint from.”

- **BENEFITS TO MENTORING CONGREGATIONS**

Although in many instances it was unanticipated, mentoring congregations indicated areas where they benefitted from participation in LoF. A common theme was that in preparing for the site visit, leaders had a chance to come together, reflect on their accomplishments, and “get on the same page.”

- “The value-added for staff and lay people was the introspection about what we have done, what we used to do and what we do now and to see the journey between those points.”
- “Leap of Faith created good conversation within our team. Hearing stories about our visioning and pathway over time was an educational process. Many had arrived at the church in past two to three years and were now hearing about developments from 10-15 years ago. It provided important historical context. All of us were sharing in the re-telling of our journey. The process highlighted all the problems we had to resolve. It led to candid and open conversations about successes and problems.”
- “Going through the process of preparing our presentations brought about the greatest change to our congregation. In explaining what we do to someone else, we have to take a close look at it. We have to know why we’re doing this. Looking so closely at this helped us see areas where we were succeeding and areas where we may have gotten a bit off track. It was an affirmation that we’ve been spending our time on the right stuff.”
- “The experience gave our own leaders a chance to get on the same page. To talk with each other and reflect as a group on what we were doing.”

In addition to the experience of taking stock of their journey, most mentors reported learning things from the aspiring congregations that they are now putting into practice in their own congregations. This was anticipated by some and came as an unexpected surprise to others.

- “Leap of Faith definitely exceeded our expectations. We didn’t expect to get as much out of it as we did. We learned the importance of a Membership Coordinator. [The aspiring congregation] has a full-time position with a much broader role. After a one-on-one meeting, our part-time Membership Coordinator has changed the way she does certain things and the way she views the scope of her job based on what she learned. The two Membership counterparts were able to compare notes and both learned a lot from each other.”
- “In working with [the aspiring congregation], we saw a way of doing things that made us rethink some of our assumptions.”
- “We were the mentor; they had specific issues they wanted to learn about, but we learned from them as well. They had ideas to share and we have put into practice things that they taught us.”

“[Being a mentoring congregation gave us the opportunity to see] how many people think this church is their church. So many jumped at the chance to present, interact, and offer their home. There was active participation across the board. We had 15 visitors here, and members and staff stepped up to every opportunity we put in front of them.”

III. SETTING THE STAGE: CREATING THE CONDITIONS FOR SUCCESS

All of the congregation teams interviewed shared what they believed were the key elements of success for the LoF initiative. In synthesizing the information gleaned across the interviews, it became clear that there was a process for setting the stage and creating the conditions for success. These elements included the following: 1) commitment and readiness for change, 2) matching congregations effectively, 3) providing adequate time to prepare and launch the pilot, 4) creating an effective learning community and the role of the New Orleans Conference, and 5) clarifying the

learning model: mentor vs. peer-to-peer. The following section takes a closer look at these conditions that proved necessary to launch a successful pilot and ensure success for the congregations.

▪ **COMMITMENT AND READINESS FOR CHANGE**

Both mentoring and aspiring congregations indicated that the desire to change and grow needed to be present at the outset in order to get the most out of LoF. “Leap of Faith is not going to give you incentive to grow,” one respondent noted. “You have to have the incentive to grow already. You need to deal with that yourself. For churches committed to grow and to the UU message, this [pilot] will work.” As one minister described it: “It’s necessary for participating congregations to have a spirit of adventure, an openness and eagerness to learn, an attitude of exploration.”

For some congregations this meant going through the difficult process of realizing that they were not growing. For those churches, LoF came at the right time and positioned them for a successful experience. “Leap of Faith ... came at the right time for our congregation and that is key to what any congregation will get out of it. We were moving in a direction of getting out to the community very slowly and, for me, with some impatience. The learning goal concept motivated us and allowed everyone to connect around a common focus and this was huge.” Another congregation experienced a similar sense of readiness: “We had just undergone some deep relationship work as a congregation, including listening circles which strengthened us and a re-covenanting process. This made us poised to do deep work together and make the most of the Leap of Faith pilot.”

In addition to a sense of readiness, LoF also required a high level of commitment from both members of the mentoring pair. The pilot involved a lot of work, and many respondents noted that it was important for both congregations to feel it was worth their time to be involved versus “just a lot of extra work.” As one respondent indicated, “You needed a buy-in from congregations that the work is worth it.”

▪ **MATCHING CONGREGATIONS**

It was not surprising to learn that the pairing of congregations was an important factor in the perceived success of the pilot. We received a wide range of opinions in regards to the question of what makes a successful match. A number of congregations felt that it was most important for paired churches to be “on the same page” in terms of challenges and goals. Aspiring congregations learned the most from mentors that had experienced similar problems or issues and found a way to work through them. One minister explained about her match: “What we wanted to learn was something our mentor could offer in strong, quality ways.” Another respondent noted that “some differences are important but if a congregation is looking at what the mentoring congregation is doing and saying, ‘*We would never do that, what are we doing here?*’ That is not going to be an effective match.”

While some congregations desired to be matched with churches of the same size, culture, or geography, others felt that it was a benefit to be challenged by the match. As one participant suggested, “In the end it may have been good for us to be paired with [our mentor congregation] as it took us out of what was comfortable and known.” An East Coast church that was paired with a congregation from the South originally thought it would not be a good match. “We expected geographical and cultural differences, but they fit us more than we thought. It opened us up to the possibility that you learn from anybody.” Another congregation talked about a similar cross-cultural exchange. “Leadership from their congregation enlightened some of our New England team members about the diversity to be found in the South. The conversation transcended the nuts and bolts of how our Churches are run.”

Taking the opposite point of view, another congregation was very displeased with the size match of their pairing. “A mid-size congregation should not be paired with a large congregation because they are dealing with totally different issues.”

The logistics of matching congregations also created some challenges for certain participants. For example, one congregation felt that matching churches that were geographically close (4-6 hours) would be helpful. “We wanted to take a bigger team to [our mentor congregation] to get more breadth and depth, but couldn’t afford to fly this big a group. It was a 10-12 hour van ride.” Another participant saw another benefit to pairing congregations that were geographically close. “There are eight congregations within [the metropolitan area]. It might be more effective if congregations were geographically close... an inexpensive way to do more together.”

Churches that were asked to share a mentor generally did not welcome that situation. “When we found out that two congregations had been paired with our mentor, there were some uneasy pieces we had to work through. We were left with uncomfortable feelings.”

As mentioned above, the level of commitment also affected the success of some pairings. One aspiring congregation experienced the discouraging situation of having their mentor drop out of the pilot.

Having our mentor drop out impacted us negatively. If we didn’t have such a strong team, we would have given up. It was disheartening, being “left at the altar”. The feeling that they didn’t want to work with us—which we heard second hand—had its affects. Transparency in the process is key and commitment on both sides is needed or it leads to bad feelings. Congregations need to think hard before committing to being a mentor.

▪ **ADEQUATE TIME TO PREPARE AND LAUNCH PILOT**

One of the most consistent areas of constructive criticism from congregations was that they were not given adequate time to prepare and launch LoF. This concern extended to deadlines and requests throughout the pilot.

Comments from participants:

- “We need longer lead time (ninety days or more), especially for a busy church. We did it in less than sixty, but it really pushed and stretched our staff.”
- “We were invited as a mentor in September 2010 and thought it was to start in October 2011. We were surprised it was October 2010. The ramp up was too short. Congregations need more time on these things.”
- “A large church needs 6 months to 1 year to be ready to launch this.
- Pilot organizers need to pay attention to the liturgical calendar and how the church calendar operates.”
- “Time constraints made it difficult for us to feel like a success. We felt we weren’t meeting UUA expectations because we couldn’t meet all deadlines and requests.”
- “We were challenged by the time crunch – e.g. Requests during Easter time, need to pay attention to budget cycle. There are better times than other to learn from each other, to make things happen in successful ways.”
- “Requests for information, key tasks, and deliverables felt last minute. It would be helpful to have expectations planned out month by month so congregations know what to expect.”

Although most participants felt that ultimately they were able to get the work done in the time allotted, there was a general sense that a longer time of preparation would have allowed them to maximize the potential for success.

- **CREATING A LEARNING COMMUNITY: ROLE OF NEW ORLEANS CONFERENCE**

Most interviewed congregations felt that certain aspects of the New Orleans conference were inspiring and had great potential for setting the stage and introducing the philosophy of the pilot. Participants felt “the energy from the community at the conference was important. The feeling of being a part of something was motivating and inspiring.” All participating congregations indicated that the highlight of the conference was the opportunity to meet with other congregations and begin to form learning communities. “We really wanted to get to the site visit, so for us in New Orleans the most important part was meeting our mentor there. It was invaluable to start developing rapport. Our two ministers were fantastic and created groundwork for a successful and useful site visit. Face-to-face time in New Orleans was critical and we would have liked more time.” Another congregation spoke of the time they spent walking around New Orleans in the evening with their matched congregation to be very beneficial to relationship building: “The mentoring relationship got off to a great start... just walking around the city of New Orleans, talking and getting to know each other. I can’t imagine how the magic of the weekend would have happened without that great beginning.”

Across the board, participants felt that not enough time during the conference was devoted to that effort. “Of our two full days there, only one hour was given to sit down with partner congregations. This was the most productive time there – learning about aspiring congregations. They should switch the ratio completely so the bulk of time is spent with the church you are going to be in a relationship with.” This thought was echoed by several participants who felt that the conference included too much “didactic teaching” with not enough time for questions and dialogue. There was general agreement that one overarching speaker was not able to address the needs and learning goals of all congregations. “Developing the philosophy through the keynote was great, but there were too many hours of it, and not enough time for dialogue.”

One congregation team thought more time needed to be spent defining what growth meant in the context of LoF, given that growth is a word often used within the UU community and yet carries multiple definitions and goals behind it.

Though frustrated with their desire for more clarity around the learning community philosophy, most congregations were supportive of the philosophy and understood some level of confusion was inherently part of the process of creating a learning community and addressing adaptive challenges. At the same time, they felt there were not enough concrete information describing what a learning community looks like and how to go about the process of creating one. As one respondent noted, “It is a good philosophy but in the future, there needs to be more structured explanations of what this is and how to do it. It is true, there is a movement in UU to adaptive leadership but we need more concrete information about how to do adaptive leadership. You can’t just explain away each of the difficulties we were having by saying, ‘that’s adaptive leadership.’ That leads to frustration.”

- **CLARIFYING THE LEARNING MODEL: MENTOR MODEL VS. PEER-TO-PEER MODEL**

One of the more wide-ranging responses we received from participants was their perception of the learning model. It seemed that most congregations, whether they were assigned to be the mentor or the mentee, approached the process from a peer-to-peer model. These congregations felt that mutuality of learning was critical and many respondents emphasized that all churches could learn from the other and teach each other. But some congregations felt very strongly that the

relationship should be mentor/aspiring with strictly defined roles for each. This perception affected the quality of some of the matches... it greatly enhanced those that were on the same page, but hindered those that did not approach the relationship with the same model in mind.

Comments that supported peer-to-peer model:

- “It became obvious right from the start that this was not a situation of the benevolent aunt shepherding the clueless nephew. [The aspiring congregation’s] problems stemmed from their success. They weren’t a congregation in trouble. We learned a lot from them. It was a mutual experience.”
- “There was acknowledgement that [the mentoring congregation] wanted to learn from us too.”
- “We learned we had as much to give them as they to us. We had a lot of common needs and problems. In some ways, they were in bigger transition—looking for a new Director of Religious Education and Minister—and so they had things to learn from us to.”
- “It would be great instead to be in an ongoing peer-to-peer relationship, exchanging ideas back and forth. Peer learning would better create a learning culture.”
- “The mentor-mentee model assumes one has so much more going than the other, versus that we are just different.”

Comments that supported the mentor/aspiring model:

- “We did not feel that we were peers with [our mentor congregation], but that was fine with us. We wanted to learn. [Our congregation] has a healthy enough sense of its own gifts. We were ok with learning and didn’t feel like a “lesser” congregation. We may not have had anything to teach [our mentor], but we would certainly be fine with serving as a mentor to a congregation that could learn something specific from us. Congregations are not always going to be able to teach each other things in equal ways.”
- “The model of our site visit was definitely more teacher/learner. During more informal conversations and social times we definitely related as peer-to-peer, but while we were there, they were teaching us, and that’s what we wanted and that’s what they expected. We weren’t there to offer them anything in exchange for what they were giving us.”
- One respondent did not agree with the rhetoric of “we’re all the same... we’re all here to learn from each other” and felt that the mutual learning experience that was stressed in New Orleans was not an accurate portrayal of the purpose of the pilot. This respondent did not want to “diminish the role of the mentor,” explaining that “These congregations are paired with mentors for a reason,” to learn from the mentoring congregations experience, because they had already successfully navigated the process.

It was shown through interviews that congregations that approached the process with the same learning model experienced high levels of success and got what they wanted out of the pilot. Those congregations that wanted to learn were most often paired with those that wanted to teach. Congregations that were more interested in a mutual learning experience were also paired together. It was unclear if this was by coincidence or design. Our researchers found only one instance where the paired congregations approached LoF from opposing learning models. In this case, the match was not successful, and the teams never really came together in a meaningful way.

IV. IMPLEMENTATION LESSONS

Once the stage has been set and the groundwork laid through addressing the above conditions for success, congregations interviewed also noted key implementation lessons learned. Congregations

learned these implementation lessons as the pilot unfolded and they went about the tasks of achieving the overarching goals of LoF. These implementation lessons also proved critical to launch a successful pilot and ensure success for the congregations and included the following: 1) creating congregation LoF leadership teams, 2) understanding roles and expectations, 3) the importance of identifying adaptive challenges, 4) the site visit, 5) pilot administration and leadership.

▪ **CREATING CONGREGATIONAL LEAP OF FAITH LEADERSHIP TEAMS**

A common thread in our interviews was that a strong leadership team from within the congregation was critical to the success of LoF. It was indicated by several congregations that a designated lay leader was the best choice to lead the team. “It’s really important to have someone in that role to discipline different efforts, to stay on scope and on track and keep pushing forward. It’s easy to get off track. The right person in that role can keep things moving forward.” One respondent noted that it was “important that the team leader not be the minister. It is a lot more effective to have a layperson. If you leave it to professional clergy, it’s not going to work as well. It needs to be a collaborative effort. The lay leader is critical.” When choosing a lay leader to head the team, congregations should look for someone with the right set of skills.

- “It’s important to have a chair of Leap of Faith at the congregation level who is very organized and committed and can carry it along and help others stay on task. We were lucky to have this in our chair.”
- “The leader of our [LoF team] was highly motivated, organized and persistent, and kept us all on track. And that makes a difference.”

Many congregations indicated that the most effective team was a combination of staff and lay leaders. Several participants noted that it was not necessary to require the Board President to be a part of the team, when other lay leaders may have been a better fit. All in all, congregations agreed that the LoF leadership team was a “wonderful opportunity for lay people. Involve as many as you can.”

▪ **UNDERSTANDING ROLES AND EXPECTATIONS**

Perhaps the largest challenge and most consistent criticism of LoF were the clarity of expectations and the parameters of the pilot. Most congregations did not feel they had a clear understanding of LoF and its requirements before going into it. This caused uncertainty and confusion about the roles of both mentors and aspiring congregations and what was expected of them. Respondents unanimously agreed that this was not made as clear as it could have been before or during the conference in New Orleans.

Many participants felt that the conference in New Orleans did not do a good job in explaining to congregations what the pilot was about. Mentors did not have a good sense of what they had agreed to. As one respondent noted, “We were not given clear direction on what we were to have done. We needed more clarity and specifics on expectations. It was unorganized in the beginning. We did not have a good sense about how this was going to work, and would have liked more specifics on the model for moving forward.”

Participants felt that the following areas should have been clearly communicated ahead of time, and then briefly reviewed at the New Orleans conference:

- The philosophy of the pilot and its purpose and key objectives
- The purpose of the kick-off meeting
- A clear definition of both a learning community and an adaptive challenge

- Requirements of both mentors and mentees
- A mentor “job description”
- Suggestions for a successful site visit
- Best practices
- A calendar of expectations and dates presented at the beginning for proper planning
- Clear parameters of budget and procedures for reimbursement

▪ THE IMPORTANCE OF IDENTIFYING ADAPTIVE CHALLENGES

Identifying the learning goal or adaptive challenge was stated to be of critical importance for aspiring congregations. They needed to be able to identify their core issues and articulate them to the mentoring congregation. As one participant noted, “It’s important to have a good, well-articulated adaptive challenge. Consider asking the mentor church to have one too. This helps you focus on what you need to do so you don’t just have general conversations. You need to ask constantly: Where is this going? How does it relate to our adaptive challenge?” Another congregation appreciated the freedom and latitude of the pilot in defining their own learning goal or adaptive challenge. “This was where we needed to be.”

In general, it was agreed that the meeting in New Orleans was essential for identifying adaptive challenges. “Our big contribution at the meeting,” noted a respondent from a mentoring congregation, “was helping [the aspiring congregation] identify what the core problem was. Once the core issue was established, we were able to spend time reflecting on that in preparation for the site visit.”

It was agreed that LoF organizers could have done more in helping churches understand the concept of an adaptive challenge, particularly at the New Orleans conference. As one participant described:

One of the main topics of the conference was adaptive challenges. That’s a fairly sophisticated concept. The organizers did not give a good summary of what an adaptive challenge was. It was clear that some congregations did not have a clear understanding of this and they were not given the opportunity to prepare for this learning ahead of time. It appeared that a majority of congregations at the conference had never heard of adaptive challenge and didn’t know what it was. If a reading list was given out ahead of time, congregations would have a chance to prepare and reflect on what they face as a community.

It was found from the interviews that aspiring congregations that had a clearly defined adaptive challenge that was also shared and understood by the mentoring congregation were able to move forward in more effective and focused ways to support and encourage changes aimed at growth.

▪ THE SITE VISIT

All congregations agreed that the site visit was the highlight of the pilot and should be considered the hallmark of LoF. According to one respondent, “The site visit is and should be the heart of the Leap of Faith pilot. Just being around [our mentoring] congregation was a positive virus that infected our team and left us energized and excited.” Another participant echoed this sentiment: “The site visit is key. You can learn a lot through phone calls and emails, but being there in person is so important.” There was a general sense that seeing another congregation in person, meeting the staff, and touring the physical space led to new ideas, increased motivation, and a stronger sense of moving forward. Participants agreed that you “have to go there to get a feel for the place and build relationships and learn from one another in a hands-on way.”

Although most congregations indicated that they had not received any direction about how the site visit should be organized, many congregations were able to put together an agenda that was well-received by the aspiring congregation. The following elements were identified as most important for a successful site visit:

Pre-planning by aspiring congregation

One congregation described their process of preparation: “We put a lot of effort into preparing for the site visit: brainstorming, refining our learning goals, ultimately choosing a list of five specific learning areas and communicating those to [our mentor] ahead of time. We did research on these areas ahead of time. Because of that, we were able to get the most out of the site visit.” Their mentoring congregation echoed this feeling: “From the very first meeting, [the aspiring congregation] was specific about what they wanted to learn, who they wanted to meet with, and what questions they had. We asked them to send us some background and history of their congregation. They did all their homework ahead of time.” This advanced planning on the part of the aspiring congregation allowed the mentor to prepare a more effective and beneficial site visit.

Pre-planning by mentoring congregation

Respondents indicated that the mentoring congregations should have a very clear idea of what areas the aspiring church wanted to learn about and prepare presentations, panel discussions, or conversations around those specific areas. A mentoring congregation to be highlighted was described in the following way: “[Our mentoring congregation] organized a fabulous visit. They took it seriously. They organized lay leaders that we were specifically interested in. We got to meet them and do some in-depth talking. We were lucky that they did such a great job. Not all congregations might have organized such a wonderful visit. Leap of Faith may want to come up with specific guidelines for what makes for a great site visit. And if they do, they should talk to [our mentor congregation]!” One congregation created the agenda for the visit by proactively asking both aspiring congregations what was most important to them and to their development. What did they want to learn and gain from the experience? These questions guided the creation of the agenda for the site visit.

Opportunity for peers to meet and compare notes: Most congregations agreed that it was important for lay leaders or staff in similar jobs to connect and share ideas and stories. A lot of mutual learning took place during these one-on-one sessions. In several cases, the relationship between these peers has continued beyond the scope of the LoF pilot.

Time for casual, social interaction: Several congregations noted that “unstructured work time” such as lunches, dinners, social time, etc. was critical to the development of the relationship and the continued sharing of ideas and experiences. During these times, ministers, staff, and lay leaders continued talking about similar interests that pertained to the life of the church.

Welcoming Environment: One mentoring congregation made creating a welcoming environment a top priority and was very successful in creating a welcoming environment for their guest. “We picked them up at airport, making sure they had a nice meal the first night and a detailed agenda for our time together. We made sure they felt taken care of. And they appreciated what effort we put in.”

Follow up and reflection: Several congregations noted that time for the leadership team to reflect and share stories *after* the site visit was important to the process. “We invested the

majority of our time getting ready for the site visit and reflecting on what we learned after the site visit. The visit itself was a small part of the process within the congregation.” Another congregation gathered a larger group together two weeks after the site visit for brainstorming and sharing based on the visit. In addition to the large group sharing, each person from this aspiring congregation wrote a personal reflection about the trip. These efforts contributed to the momentum that began at the site visit and gave a sense of moving forward.

▪ **PROGRAM ADMINISTRATION AND LEADERSHIP**

Although congregations noted frustrations and challenges along the way, the majority felt it was worth the effort and that UUA administration and leadership were clearly committed to the LoF initiative. An aspiring congregation explained that those leading the pilot at the UUA were “there in mind, body and spirit and were clearly committed to the program and its goals.”

At the same time, most of the congregations interviewed did note that administration of LoF needs strengthening, particularly around communication. Communication was described as ‘too complicated.’ The technology (Google Docs, for example) did not work as it was planned and created frustrations on the part of LoF teams. “[You] need to make it work for the people you are serving so they can use the information. Not process for process sake.”

Additional concerns about communication included a lack of clarity, uneven dissemination of information and last minute requests that presented difficulties and hardships for congregations:

- “We needed clearer information on what is funded and not funded. It was hard to plan. The cost ran into thousands of dollars from the church budget – this needs to be planned in advance. We don’t have that kind of flexibility in our budget.”
- “It was tough to ask congregations to create a video in a week. We don’t all have tech. savvy members to do it. It typically falls on the Minister if don’t have member who can do it... and that is too much to ask.”
- “If the UUA wants videos, it is important to fund congregations to hire videographers. It was unfair to ask our congregant, who is a videographer, to do it without pay when he is unemployed right now.”
- “The turnarounds for requests have been too fast. Even this interview process is frustrating. We did not have a lot of notice and In June, the ministers go on sabbatical.”
- “We always seem to be on tail end of being told what was going on. We learned about evaluation in October. But some knew in August. The information didn’t seem to get out evenly and that was difficult.”

In addition, several respondents felt that UUA leadership needed to re-think and clarify the skills needed in a pilot management person at the UUA level. One aspiring congregation thought the UUA pilot management staff person should be a mentor to the congregations with the vision skills necessary to help congregations move toward the overarching goals of LoF. Most congregations also felt that more UUA staff time should be dedicated to administering the pilot so that congregations had more accessibility to UUA pilot manager when they needed help or support. One congregation team noted that the pilot manager seemed to be more of an office assistant who did not have the vision or technical skills to effectively support congregations. Several congregations also shared that they were not satisfied with the level of responsiveness for their requests for support, help or additional information.

Several congregations noted that UUA staff worked hard and were committed and yet felt that LoF was added to their responsibilities, and that UUA leadership might want to increase the level of investment in staff to support the initiative.

Several congregations also noted that documentation and evaluation efforts were challenging, particularly online and social networking requirements. One congregation team noted, “Posting pictures, providing feedback and information online... some of that happened but not much and if it did, we didn’t have the time to look at what others had shared and really digest it. It never manifested in way that they [UUA] had hoped. Not sure what the answer is but it is an issue. People come in with a wide range of technical abilities and interest in social networking way of learning and sharing.”

Another respondent spoke directly about the challenge of creating a learning community through social networking,

“There is so much emphasis on groups communicating this way and becoming involved in social networks that we are over-social networking. Unless we up set up a system for how to make this happen, to really expect people to take a lot time to do this, is not realistic... I have looked at my time when I am accomplishing things – and I realized, it’s when I am [not] social networking. It eats up too much [of my] time from working on real goals.

Another respondent wondered about simplifying documentation requirements to create conditions for success and ensure more even effort across congregations, “Maybe make it simpler, less ambitious on the technical side. Give some basic requirements like, once a month do x or four times do y. Set some minimum pieces around this and let others run with it if they want to. Otherwise it can feel overwhelming. Congregations want satisfaction of what we are doing well and setting achievable, realistic goals is an important part of this.” Minimum requirements might also address some of the negative feelings that occurred due to differences in congregations in terms of what they completed. One respondent noted, “We kept up on Google docs website for Leap of Faith. But we did not see very much on there from other congregations to learn from them, and that was disappointing.” Another congregation team explained that for them, unrealistic expectations led them to feel pushed and like they were not succeeding and that they had to make the decision to not meet each requirement if it meant derailing their change goals and overburdening staff and lay leaders.

This same congregation wondered if some of the cross-congregation learning might better occur after the year-long LoF process. They wondered about a closing conference to share lessons learned. In addition, several congregations supported the creation of case studies of several matched congregations to document what happened and disseminate as models for other congregations beyond the original LoF participating communities. One minister shared, “Case studies are extremely beneficial because they are real and you can see yourself reflected in the story. And you can also look for common threads across case studies to begin to better understand how to do this. And the concrete examples in the stories demonstrate how lessons learned played out in specific communities.”

V. RECOMMENDATIONS AND BRANDEIS TEAM REFLECTIONS

A. Recommendations from the LoF Pilot Congregations

Practical, operational suggestions and constructive comments made by both aspiring and mentoring congregations would be fulfilled by the creation of a “Welcome Packet” of information designed to introduce participants to the pilot and get them started. This packet of information should be given out *before* the Leap of Faith kick-off conference and briefly reviewed at the conference with time for congregations to ask questions and engage in dialogue about the pilot and its goals. It is our recommendation, based on information and comments gathered through out interviews, that the Welcome Packet contain the following elements:

- Leap of Faith mission statement: What is the purpose of the pilot? What are its goals and objectives?
- More clarity on what growth means (is it just numbers) and how there are different ways to get there.
- Clearly defined expectations and goals for the participants in the pilot. What specifically is expected of aspiring congregations? What is expected of mentoring congregations? What level of commitment is required for participants to be successful in LoF?
- Mentor Job Description (if the Mentor/Aspiring congregation model continues to be used): What does it mean to be a mentor? What are they required to do?
- Adaptive Challenges: A thorough definition of what an adaptive challenge is and a list of guidelines for how aspiring congregations can identify their adaptive challenges.
- Kick-off Conference: Define the purpose of this initial conference. What can participants expect to accomplish? How can they best prepare for the conference?
- Calendar of events and deadlines: Information for congregations on what is due and when.
- Policies and Procedures: Information on budget guidelines, reimbursement procedures, and any other logistical information needed to navigate the pilot.
- Site Visit: Guidelines and suggestions for creating a successful site visit.

1. RECOMMENDATIONS FOR LEAP OF FAITH LEADERSHIP

- Dedicated UUA staff to provide adequate support and follow-up for congregations seeking help and additional information
- Documentation and evaluation: Simplify reporting requirements/ social networking component and consider adding end of year learning retreat and the development of several case studies to document and disseminate lessons learned
- Awareness of time commitment, level of effort and cost for both mentoring and aspiring congregations to implement LoF and achieve success. Set realistic goals and requirements
- Consider continuing in some way beyond first year as a way to extend learning and opportunities for growth over time. One year is too short a time period for concrete changes and growth to occur.
- Create hybrid models of LoF to open it up to more congregations and provide additional less expensive/resource intensive ways for sharing and connecting across congregations

as it was clearly a worthwhile investment. For example, less intensive versions of local LoF networking within a smaller geographic area.

2. RECOMMENDATIONS FOR MENTORING CONGREGATIONS

Several mentoring congregations discussed the fact that **cost of building relationships is the time it takes to do LoF with intention**. As one respondent noted, “It is part of the gift and also a big burden on hosting congregations.” These congregations recommended building in weekly time over at least an eight week period for Minister and LoF pilot manager to meet to plan the site visit. LoF was very expensive in terms of staff and lay leadership time and money spent. Factor this into the calendar for the year.

Other mentoring congregations felt it was critical to spend time talking to aspiring congregation in advance to **gain clarity on their adaptive challenge, goals, and learning needs**. They recommended interviewing aspiring congregations and listening to their story and once having a clear understanding of the adaptive challenge and leaning goals to **work collaboratively to determine an effective learning model** that will work for aspiring congregation (e.g., didactic teaching versus problem solving sessions versus dialogue session).

Another clear recommendation was for mentoring congregations to **take the opportunity to document their congregation’s narrative** as it is being shared with aspiring congregation and as part of the planning process. This was a significant benefit to mentoring congregations. Many of them cited they now had a coherent narrative of growth and change to share over time as leadership and membership grows and change, which will add to continuity and continued forward movement.

Seize opportunities for cross-congregation learning when it presents itself...

3. RECOMMENDATIONS FOR ASPIRING CONGREGATIONS

Congregation teams interviewed had many parting words to inspire the next round of aspiring congregations to make the most of the LoF initiative. In particular, we heard again and again that aspiring congregations should consider the following:

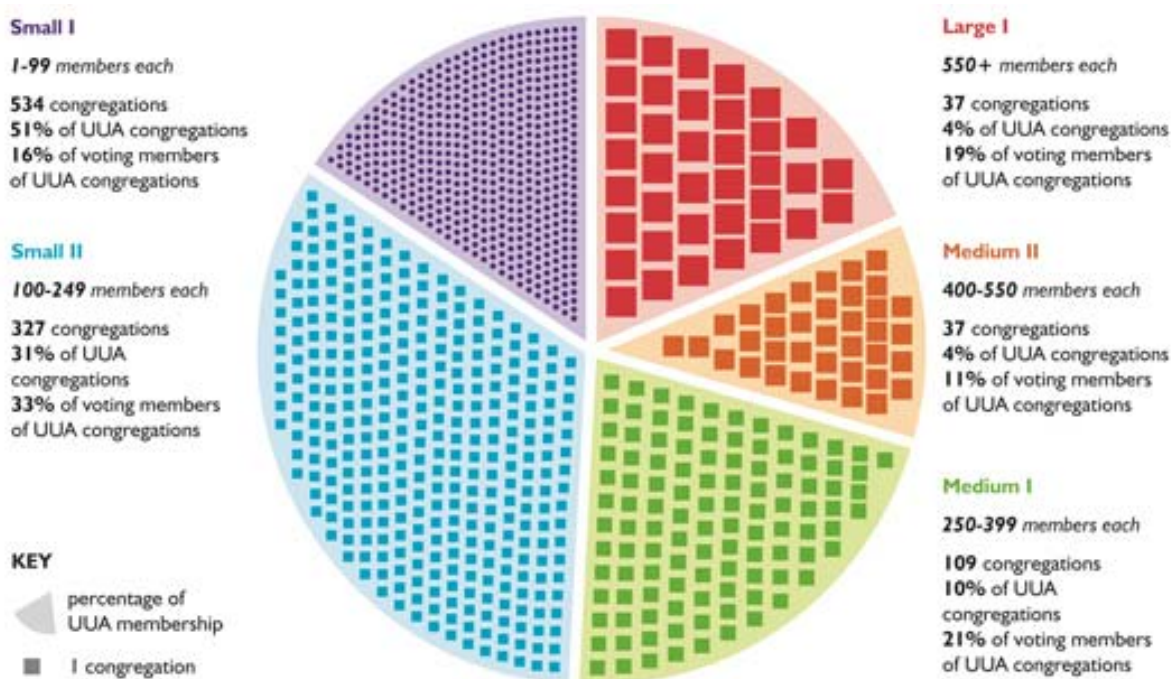
- Embrace the opportunity and make the most of it
- Get the right people on the team – people who are excited
- Think about who might be a strong fit to lead and manage the initiative
- Know you cannot predict where it will go.
- Keep an open mind. Be open to changing your perceptions. It may come out different than where you started.
- Gather input from key stakeholders about your adaptive challenge and then spend time clarifying and fine-tuning adaptive challenge and goals to help stay focused and on track.
- Think about ways to engage the whole congregation to create sustainability and continued forward movement.

B. BRANDEIS TEAM REFLECTIONS: UNFINISHED WORK

From our perspective the LoF pilot was initiated by the UUA at a critical time in the history of the world and of the UU specifically. The vision for the growth and change agenda articulated by the UUA leadership and in many congregations, and now concretized in the LoF logic model, is ambitious and necessary for “the UUA to flourish and for liberal religious values to permeate the culture.”

The work has begun and is unfinished. Though we are UU’s ourselves, we were initially unaware of the scope of the challenge. The article in the Winter 2011 edition of **UU World** on the size of UU congregations by Walton (see Exhibit 1 below) identifying the dimensions of the dilemma was instructive and the Minnesota lecture series including insightful and spirited articles by Robinson, Sewell, Southern, McNatt, Beldon, and Hardies provided both urgency for action and complexity with regard to the various analyses of what the “problem” to be solved might be and what might be the key to addressing them.

EXHIBIT 1
“MOST CONGREGATIONS HAVE FEWER THAN 100 MEMBERS,
BUT MOST UUS BELONG TO LARGER CHURCHES”²



With regard to next steps, cohorts and investments in LoF, our opinion is to keep going. The UU constituency is hungry for the UUA sense of belonging, recognition and inspiration. Giving voice and providing leadership and resources for connections has and will pay off! We also find that a more explicit focus on growth goals and scenarios would be welcome and helpful. Finally, since the UUA is investing in the Threshold Congregations pilot and other innovative ways of addressing its very real challenges, we recommend that evaluation efforts be extended to formally link outcomes and learning from these efforts to optimize impact.

² Christopher L. Walton, *What size are Unitarian Universalist congregations?* UU World, Winter 2011.

UUA LEAP OF FAITH PILOT LOGIC MODEL

MISSION: Congregations will demonstrate statistically significant growth in membership and qualitative improvements in ministry and pilot effectiveness.

FOR WHOM	ASSUMPTIONS <i>Moving From...</i>	STRATEGIES <i>Through...</i>	OUTCOMES <i>Through...</i>	MEASURES FOR SUCCESS	IMPACT <i>To</i>
<p style="color: blue; font-weight: bold;">Congregations that aspire to grow and are committed to learning from each other</p>	<ul style="list-style-type: none"> ▪ Our congregations have the capacity to change, grow and deepen their sense of mission and ministry. ▪ Our imagination for our faith’s potential is limited and new strategies for creativity and growth are needed. ▪ Many congregations have unnecessarily plateaued or are shrinking when they have the capacity to be larger and more vibrant. ▪ The UUA has an important role to play in reaching helping congregations reach their fullest potential. ▪ The UUA seeks to nurture and support the congregational capacity within our covenantal relationships. ▪ Skillful professional ministry is essential for development of healthy congregations. ▪ Effective learning follows curiosity and our teaching comes from deep experience. ▪ Growth is enhanced by culture changes that move congregations toward vitality and purpose. ▪ Effective multicultural ministry requires intention and learning. ▪ Congregational teams of ministers and lay leaders can create change in the congregation as a whole. ▪ Individual congregations have different needs for learning which requires flexibility and responsiveness. ▪ We measure what we value and that data is critical for improvement and making sound decisions. 	<ul style="list-style-type: none"> ▪ Develop congregational leadership skills necessary for culture change. ▪ Develop ability to challenge the congregation’s established ways of thinking and doing to successively develop and use more effective ways (adaptive capacity) <ul style="list-style-type: none"> ▪ Ability to change the congregational culture from mono- to multi-cultural (including race, ethnicity, sexual orientation, gender, class, age) ▪ Ability to provide leadership for effective UUA ministry ▪ Ability to create learning communities³ ▪ Ability to use data for improvement and making decisions ▪ Co-design learning, consulting, and support relationships among congregations using <ul style="list-style-type: none"> ▪ Face-to-face contacts ▪ Learning visits to congregation partners ▪ Digital media (Skype, conference calls, Facebook) ▪ Enhance the partnership of ministers and lay leaders through training and education <ul style="list-style-type: none"> ▪ Learning communities ▪ Narratives of each congregation’s journey of growth ▪ Regular communication <p>○ LoF leadership team will communicate what is being learned to the UUA</p>	<ul style="list-style-type: none"> ▪ Participating congregations work in common purpose to increase the effectiveness of Unitarian Universalism at the congregational, regional and national levels. ▪ Participating congregations view themselves as part of a larger whole. ▪ Participating congregations develop ongoing collaborative learning partnerships. ▪ Participating congregations are healthy and vital through improvements in ministry and pilot effectiveness. ▪ UUA staff apply Leap of Faith lessons to providing support to congregations so they can become healthy, vital and multicultural. ▪ Learning and evaluation become embedded as routine practice in congregations & UUA. 	<ul style="list-style-type: none"> ▪ Ministers and lay leaders report working in common purpose viewing themselves as part of larger whole and developing collaborative learning partnerships (surveys, interviews, observations and membership assessments of ministerial leadership) ▪ Congregations who participate in the pilot report improved vitality (#s and stories are collected through document review, interviews and climate survey of membership) ▪ Program level evaluations show growth and effectiveness (survey of participants, e.g., “course evaluation” and instructors interviews) ▪ Documentation of UUA dissemination of lessons and uptake of UUA congregations (survey) ▪ All pilot congregations and UUA use real time results of evaluation as a management and leadership tool for continuous improvement and growth (survey) 	<p style="color: blue; font-weight: bold;">UUA flourishes and liberal religious values permeate the culture</p>

³ Learning communities = groups of people working together to collectively enhance their capacities to create results they really care about (Senge)