

**Report to the UUA Board of Trustees
for its January 2009 Meeting
from the
UUA Ministry and Professional Leadership Staff Group**

**Office of the Director of MPL
Beth Miller, Marion Bell**

The Board of Review (BOR) met recently to review and update their rules in response to changes in MFC and RECC rules and attendant UUA Bylaws. I met with them to discuss the issue of including attorneys in the appeal process. You may recall that BOR Chair, Bob Bacon, told the delegates at GA that attorneys were allowed in the BOR appeal process, even though they were being eliminated in the MFC's updated fellowship review process. He later went back and discovered that this was not the case in the then current rules. BOR has incorporated this in Rule 12 which simply says: *Both the appellant and the Committee shall have the right to engage counsel throughout the appeal process.* They see this as granting permission rather than creating an expectation. This change will be brought to the January meeting for Board consideration.

The Religious Education Credentialing Committee (RECC) is considering a significant overhaul to its process for achieving RE credentials at all levels in response to concerns raised by DREs and ministers that their programs are too demanding. Changes will affect all three credentialing levels and, while still requiring appropriate competencies, should make it more accessible to RE professionals coming from diverse educational and career backgrounds and working in a vast variety of congregational settings. Proposed changes were drafted at their October and stakeholders are currently being consulted. You can expect rules changes to be presented for Board consideration later in 2009.

The UU Musicians' Network (UUMN) has developed a certification program (see: http://www25.uua.org/uumn/certification/general_info.htm). The UUA has agreed to administer the program similarly to how we support the credentialing of ministers and RE leaders. Beth Williams, RE Credentialing Director in MPL, is the UUA MPL staff person working with the UUMN on this, although Erik Wikstrom, Music and Worship Resources Director, is the UUMN's liaison with the UUA for other purposes. The UUA has taken financial responsibility for approximately 50% of the program this fiscal year (FY09) and intends to accept 100% in FY10.

The Panel on Theological Education's (POTE) Excellence in Ministry Summit was held 12/10-13 in Seattle. Wayne Arnason and Emily Gage represented the MFC, along with Burton and Jackie as the Board members on the MFC. This was a far ranging discussion using open space technology with over sixty participants representing the UUA Board and staff, the theological schools, professional organizations and other UU stakeholder groups, as well as guests from beyond the UUA community. Dan Alshire,

President of the Association of Theological Schools, was keynote speaker and Susan Beaumont, Alban Institute senior consultant, facilitated. You will learn the very exciting outcomes of this gathering from your board members who participated.

Dreaming Big, the program for 20 potentially excellent larger church ministers funded by the grant to POTE from Shelter Rock, had its first retreat in Concord, MA, the first week in November. While there were logistical issues due to construction at the Concord church, the program itself was very well received and deemed helpful by participants. Their feedback was quite positive and showed great consistency about what needs to be adjusted for the next retreat in St. Paul (2/7-10/09). In addition to six retreats, participants have reading assignments, a listserv to share their thoughts and challenges, and each one has a mentor minister who is a larger congregation senior, lead or co-minister. We are very excited about the potential of this program.

The Service of the Living Tradition at GA will be on Friday evening, 8:30 – 10:00 p.m., to accommodate the UU University. The schedule will be very tight Friday evening, but we will make it work. Mary Harrington is preaching. The music director has not yet been named. We will follow the same format as last year with all honorees submitting photographs ahead of time to be shown on the large screens when their names are called and responsive litanies instead of walking, receiving certificates, and shaking hands with UUA leaders.

Ministerial Credentialing

David Pettee, Christine May, Mohammed El-Khatib, Kim Wilson

Since the October 2008 Board meeting I have visited with students from Bangor Theological Seminary, Andover Newton Theological School, Pacific School of Religion and Starr King School for the Ministry. I will be meeting with administration and faculty representatives of Seattle University in mid-December.

Not a surprise, given the turbulent financial environment we have been in, money issues have become increasingly paramount for many seminarians. I am seeing an increase in requests for financial support. Some of the RSCC's are noticing a drop in interest while others are very busy. It is difficult to know if the economy is a factor but intuitively I have to think it is does.

Much of my time this fall has been spent being attentive to the logistical details of the upcoming 'Excellence in Ministry' conference being held in Seattle immediately following the MFC meeting in San Francisco.

Kim Wilson has been working closely with me, Sofia Betancourt and Alicia Forde to continue to develop Diversity of Ministry Team internship sites. We now have five such sites: All Souls Washington, DC; Annapolis, MD; Oakland, CA; West Shore, Cleveland, OH; and Rockville, MD. Our main challenge now is that we have a very small pool of qualified candidates –two, maybe three to our knowledge.

The Ministerial Internship Manual was updated over the summer and released in early September and seems to be well received. In keeping with the trend toward web-based resources, the Manual will be updated every August which will keep it up to date with regard to any MFC changes.

Closing on a more personal note regarding my commitment to anti-racism, anti-oppression and multiculturalism, since the last Board meeting, I also put the finishing touches on an article about my family legacy with slavery that will be published in *New England Ancestors*, and have had further anti-racism training in Seattle with others who share a common familial legacy as mine, and experienced further reconciliation between my family and the descendants of a man that had been enslaved by my family at the Prudence Crandall Museum in Canterbury, CT.

Religious Education and Music Leadership Credentialing **Beth Williams, Paula Welling**

Religious Education Credentialing Program

There are currently thirty-four active participants in the program: nine are seeking Masters Level, eighteen are seeking Credentialed Level, and seven are seeking Associate Level. The number of active participants is down from thirty-nine reported in the last quarter and from forty-six reported one year ago. At its October 2008 meeting, the Religious Education Credentialing Committee (RECC) credentialed one religious educator at the Credentialed Level. In addition one religious educator was credentialed at the Associate Level in this reporting period. This brings the total of credentialed religious educators at all levels to fifty-one. Three applicants were accepted into the program, three participants withdrew from the program, and one participant was put on Hold status. We said goodbye to RECC chair Gail Forsyth-Vail and look forward to supporting temporary chair Kirk Loadman-Copeland until a new chair is appointed. Before beginning their last meeting the RECC got an opportunity to meet many of the religious educators attending the LREDA fall conference. In conversation these religious educators explained to the RECC what barriers existed in the RE Credentialing Program to prevent them from entering and completing the program. These conversations elicited serious examination

by the RECC of the credentialing program and what might be done to break down these barriers. We look forward to supporting the RECC in this work.

Renaissance Module Training for Religious Educators

Five Renaissance module trainings were conducted in the last reporting period, with eight additional modules scheduled so far for the remainder of the fiscal year. A “leader-in-training” program has been initiated to develop new leaders for specific Renaissance modules. One leader has been trained so far and two are in the pipe line.

Music Leadership Credentialing Program

As part of the transition of the UU Musicians Network (UUMN) Certification program to the UUA Music Leadership Credentialing Program, all candidate data was transferred from the UUMN offices to the UUA where it was posted to the UUA document management system. This allowed the Leadership Development Board (LDB) of the UUMN to more easily complete annual evaluations on the current candidates. Six candidates are expected to complete the program during the current fiscal year. Rules and UUA Bylaw changes required for transitioning this program to the UUA with a UUA Board appointed Music Leadership Credentialing Committee were completed and are submitted to the UUA Board under separate cover. The LDB has developed procedures for a final evaluation for these candidates. A UUA webpage supporting the Music Leadership Credentialing Program is currently in development.

Transitions Office

John Weston and Emily Schwab

The Recession of ‘08-‘09 is having a noticeable effect on ministerial search and settlement. Only 45 congregations are in search of a settled minister; this is approximately a third fewer than the annual average number of congregations in search in the previous three years. Similarly, congregations are the beneficiaries of only meager ministerial interest: 21 are receiving 6 or fewer names, 14 between 7 and 12 names, 6 between 13 and 19 names, and only 4 over 20 names. The effect of this low activity on the ensuing interim ministry placement process is anyone’s guess.

Ministerial Development

Jory Agate, Margaret Montore

Addictions Ministry

The Addictions Ministry Committee will meet in Boston in February. They are gathering material to launch a website and planning workshops for GA and Ministry Days. They are expanding their committee with youth and people of color.

Dreaming Big

The first of 6 retreats was held in Concord, MA in November with 20 participants from around the US and Canada. The topics for this first retreat included identity, growth and self-care for large church ministers. Our next retreat will be held in February in St. Paul, MN.

First Year Ministers' Seminar

There are 49 new ministers in this year's "class" and so far 28 are registered for a February retreat. Martha Niebanck and Keith Kron will assist me in leading the retreat.

Culminating Chapter

The Ministerial Development Office is sponsoring a conference called "Creating a Culminating Chapter for Your Ministry" for ministers who see themselves as retiring in 5-7 years. This is a program designed to enable ministers to vision and craft a legacy and final shape of their ministry so that they don't enter into retirement in burnout. The Office of Church Staff Finances will be joining the program to assist in retirement planning. It will take place from April 13-17, 2009, in Jacksonville, FL. So far 30 ministers are registered for this conference and religious educators have been invited to join.

Preliminary Fellowship

There are currently 280 ministers in Preliminary Fellowship and 36 ministers in Inactive Fellowship Status. Of the ministers in Preliminary Fellowship, 5 are out of compliance with MFC rules that require them to submit applications for renewal of fellowship.

Continuing Education & Career Counseling

Since the beginning of this fiscal year that began July 1, 2008, \$60,000 has been allocated to approximately 126 ministers for continuing education grants. Over \$10,000 has been granted for sustentation to 12 ministers for longer-term counseling and career assessments. Last year a total of \$71,750 was granted to 172 ministers for continuing education and \$17,397 to 22 ministers for sustentation.

Deceased Ministers

The following are the ministers whose deaths we have learned of since October 2008:

Berjoughie “Berjie” Andreassian Bergler (1922 - 2008)

Donald Manning Hinckley (1920 - 2008)

Felix Danford Lion (1914 - 2008)

Richard F. Drinon (1932 - 2008)

We will remember them...

Friends and colleagues are encouraged to share their reflections on their ministries at this site: <http://uuminmemorialpage.blogspot.com/>

Office of Church Staff Finances/UUA Health Plan

Richard Nugent, Joyce Stewart, Tracy Withy-Browne, Jim Sargent, Liz Oliver

The Office of Church Staff Finances manages the UUA Health Plan, Retirement Plan, and Group Insurance programs and oversees many of the aid funds providing financial assistance to ministers, surviving spouses/partners, and other church staff. We also shepherd development of the Salary Guidelines and coordinate the District Compensation Consultants program. Since our last report, Liz Oliver joined our staff as Group Insurance Plan Administrator and Tracy Withy-Browne is the new UUA Health Plan Coordinator replacing Kati MacDonald who shifted over to the UUA Human Resources staff. If I can be of assistance to you, please don't hesitate to call at (617) 948-6456 or email at rnugent@uua.org.

2009 Salary Recommendations:

The Compensation, Benefits and Pension Committee adopted the 2009 Salary Recommendations at its October 2 meeting. The 2009 salary recommendations are based largely on the results garnered from the salary survey distributed to all UU congregations in May, 2008. The Compensation Committee also used as guidelines the salary data provided by the Economic Research Institute (ERI) that is gathered from comparable non-profit organizations. The Geo Indices, based on data from the ERI and advice from our District Compensation Consultants, have also been updated.

UU Organizations Retirement Plan:

Given the market volatility, our office has fielded many calls from Retirement Plan participants. Of our 2,750 participants, the average portfolio is approximately \$52,000 while the median is only \$20,000. In the coming months, our office will be coordinating the process evaluating whether to remain with Fidelity as the host of the UUA Retirement plan. Three companies have responded to our Request for Proposal (RFP). These

responses are being reviewed, and additional information sought prior to the oral presentations before the Compensation, Benefits, and Pension Committee. In January, an electronic survey will be sent to all plan participants to gauge their opinions. The Compensation, Benefits and Pension Committee is expected to make a recommendation by late spring. If there were to be a change in providers, it appears at this point that the conversion would take place effective January 1, 2010. These dates are subject to change as we move through this complicated process. Contact Joyce Stewart (jstewart@uua.org) for more details.

.UUA Health Plan

The UUA Health Plan is wrapping up open enrollment, and the employee count is expected to be 760 for January 1, 2009, growth of 15.2% over January, 2008. The growth from 2007 to 2008 was 12.4%, so the growth trend is accelerating. Nearly all of the growth during open enrollment was within currently subscribing congregations, although we did see an increase in the number of subscribing congregations from 323 to 330. Based on the past two years' experience, we expect to see growth continue throughout 2009, adding at least 50 additional employees. The Plan has been receiving a significant number of inquiries from congregational staff people who expect to lose coverage through their spouse/partner in 2009. That economic reality, plus our increasing favorable market position with a compounded two-year premium rate increase of only 4%, put us in a strong growth position. The Trust has received a preliminary report from KPMG auditors, who report that the Trust is very sound financially. Reserve growth has been steady since inception. The auditors and the Trustees are engaged in an active dialogue on the best way to structure management controls appropriate to a \$6.5 million operating entity. Staff is closely involved with the Church Benefits Association to monitor the health care initiatives of the Obama administration. The initial read from CBA lawyers and lobbyists is that the state programs for children (sCHIP) will get intense scrutiny in the first 100 days, followed for the rest of 2009 by hearings, proposals, and counter-proposals on the restructuring of Medicare, ERISA, and the Tax Code. If you have any questions, you can call Health Plan Director Jim Sargent at (617) 948-6405 or jsargent@uua.org

Office of Worship and Music Resources
Erik Walker Wikstrom

The survey *Help Shape the Future of WorshipWeb* was posted on October 28, 2008. It was advertised in the November Congregational Mailing; through the UUMA, UUMN, LREDA, and Worship-L list serves; and throughout the UUA web site. Preliminary statistics, as of December 18th: 295 started the survey; 203 (68.6%) completed it. 95 indicated a desire to continue the conversation and many of these offered resources.

The vast majority (40.1%) of respondents were ministers, followed by music directors (13%), and lay worship leaders (11.9%) and DREs (10.8%). Respondents came mostly from mid-size (48.4%) and small (44.6%) congregations.

In general, respondent's experiences have been positive. On the other hand, many also wished it could be more. In an open-ended question (*The five words I would use to describe the Worship Web are . . .*) the most frequent responses included: *Helpful* (and related terms), *Limited and incomplete* (and related terms), and *Frustrating, jumbled, poorly organized* (and related terms). It is clear that there is room for improvement.

When asked which areas they would like to see more resources for the top five came out to be: *Multigenerational Worship, Festivals & Special Services, Storytelling and Drama, Music, and Multicultural Worship*. (Lay Worship Weavers programs just missed the cut.)

While I am continuing to mine the data, this preliminary analysis identifies a set of priorities and a sense of direction for the first phase of development, as well as beginning the process of identifying collaborators.