**fdo-webinar-who-you-gonna-call-march-2017.mp4**

PAT KAHN: All right, that slide that's my cue to say welcome to our March Faith Development Office webinar, "Who You Gonna Call?" And I want to start off by saying thank you to Kareem, who will shortly be turning his camera off. But he is our tech support tonight. And we're glad that he's here. And my colleague, Jan Gartner, is here with me. I'll let Jan introduce herself and say a little something.

JAN GARTNER: Sure, hi, I'm Jan. How's my sound? Sound OK? Great. I work for the UUA national headquarters from my home near Rochester, New York. I'm in the office of church staff finances with the title of Compensation and Staffing Practices Manager. And in a few minutes I'll say a little more about what I do. I started at the UUA in 2011 in the Faith Development Office. And I moved over to this office in July.

PAT KAHN: And I'm Pat Kahn. I also work for the UUA as off-site staff from Atlanta, Georgia. And I'm the Professional Development Programs Manager in the Faith Development Office. And as I mentioned before, Kareem Watson is the Office Administrator in the Faith Development Office and he's doing tech support for us tonight. Jan will start us off with some opening words.

JAN GARTNER: Yeah, and I'd like to just put in a plug for the Worship Web, where I found these lovely opening words tonight. This is called "So that we might, together, shine," by the Reverand Eric Walker Wickstrom. When we light our chalis, everyone focuses on the flame. Yet it is the paraffin of the candle, the cotton of the wick, the potassium chlorate and sulfur of the match, and the oxygen in the air around us that makes that flame possible. As leaders, we are not called to be a lone beacon on a hill, rather we are meant to work together so that we might, together, shine.

PAT KAHN: Thanks, Jan.

JAN GARTNER: All right. So Pat and I have been running in the same circles for quite some time now. It's funny, because people have literally been mixing us up, I think even before we came to work at the UUA. We both went through to the credentialing program. We're both DREs in large churches. We both spent time on the Laredo Board. We've been good officers. We joined UUA staff within a few months of each other. And it's just been part of our tradition for people who approach one of us that maybe we're thinking that we did what the other person did. So especially since people are having trouble keeping our old roles straight, and now we're both in slightly new roles, we thought it would be a great time to share a little bit about both of our roles and how we're supporting you together.

PAT KAHN: And so, I'll just talk a little bit about what we both used to do. I'm still in the Faith Development Office. But before this, I was the Children and Family Programs Director. I did the Renaissance Program as part of that, and spent most of the time on Tapestry of Faith, Children and Mutli-Gen Programs, as well as developing and curating resources for children, for families, multi-gen, and well, really across the board. And Jan--

JAN GARTNER: Yeah, I was previously in the Professional Development Office, as I mentioned. And I was overseeing RE Credentialling and Music Leader Certification. I was supporting transitions, and staff teams, and a variety of professional issues relating to just general-- whether it's discernment, or problems, and sometimes bounce things back and forth with good offices or regional staff. So those are the kinds of things I did in my previous job.

PAT KAHN: I have Jan on this slide, but that's OK.

JAN GARTNER: Oh, really, OK-- well, so, "Who you gonna call?" There's our little icons. As we go through the rest of the slides, we made a little visual for you to follow along who's who, to help you. So Pat is the panda, and Jan is the jaguar. And the upshot is-- I'm going to say it now, and we'll say it again, if you're not sure, you can always call either of us. So don't feel like you have to memorize what we're about to say. But Pat is still in the Faith Development Office. And then, as I mentioned, I changed offices. And both of us have held on to some of the pieces that we used to have. Both of us have shifted some of the pieces that we had.

PAT KAHN: Right, so we'll each tell you a little bit about that. So "Who you gonna call?" You're going to call me if you want to talk about the RE Credentialing Program, the Music Leader Certification Program, the Renaissance Program, which is the one piece from my former portfolio that I've brought over with me, and general professional questions, as well. And so that's basically the overview. There's a couple of other things here or there, but we'll get to that.

So let me just give you a teeny bit of an update on kind of what's happening with each of these major pieces of my portfolio. In the RE Credentialling Program, people sometimes wonder how many people are credentialed already? We have 121 credentialed religious educators. Currently, we have 39 in the program. And I've got about 16 people who tell me they're in some process of sending in or working on their applications. So it's a very healthy program and it continues to grow. In the Music Leaders Certification Program, we have already graduated 37 music leaders from that program. There's currently 16 people. And the Music Leader Program runs on an application basis on an annual basis.

And last week was the deadline for applications. And we have 10 new applicants, which is a record number, and we're really excited about that. And the Renaissance Program, we have, in the last couple of years, we've averaged about 17 Renaissance Modules each year that are sponsored either by regions, or Laredo chapters, or sometimes congregations. This year, we're up to 25 already. And interestingly enough, almost half of those have been either online modules or hybrid modules. And hybrid modules are a combination of online and in person.

And in the chat box in a minute you'll see links to two call and response blog posts, one about the online UU History Module, which was the first online module. And also, something about the first hybrid module that we did. We now have expanded beyond just the UU History Module, which we created has online because it was a topic that you really couldn't cover adequately in the typical 15 hours. So in addition to UU History, we feel the same way about a brand new module that right now is being field tested. It's UU Theology. And that will be available for other groups to sponsor later on this spring, once we've finished the field test and made any necessary revisions.

But in addition, last summer, we field tested online versions of the Administration Module and the UU Identity Module. Those are two modules that newer religious educators are usually anxious to take. And so we thought we could make them more accessible to more people by also providing an online version of that. So those are now both available. And we'll be adding some more online versions of in-person modules. So far, we've done three different modules as hybrid's, the Teacher Development Module, the Adult Faith Development Module, and Curriculum Module.

And we are likely to be adding more. In fact, I can say that the UU Theology Module, which I mentioned is being field tested now, we will be doing that at RE Week at the Mountain, in Highlands, North Carolina this summer. And because that setting only affords us 15 hours, and as I mentioned this is a greater time commitment than that, it'll be a hybrid, because we'll be doing online pieces to go along with that, either before, or likely after. We'll start off with the in-person, and then finish up online. So those are just some of the highlights of what's going on in those major pieces of my portfolio.

JAN GARTNER: Great.

PAT KAHN: Who you gonna call?

JAN GARTNER: Yeah, you're gonna call Jan, the jaguar, for compensation and benefits, which is sort of the meat and potatoes, I guess, of my work. And also congregations as employers, which really is my language for just lifting up that our congregations are indeed employers and to help give them that mindset in how they treat their staff. And then staffing practices is a little bit more of the real nuts and bolts of being employers. So things like I'm working on an onboarding checklist for new hires and that kind of thing. So I'll say a little bit more about each of these areas.

So what's going on with compensation and benefits, I'll add here that my position is now full time, and the person who preceded me was half time. So Betsy, my predecessor, really her job was overseeing the compensation program. So those nifty little salary charts that get posted each year, as well as overseeing our regionally based compensation consultants. And I hope you know that those people exist to help our congregations with compensation issues. So when my position expanded, that allowed me to add on these other employment issues.

So compensation and benefits, one thing I want you to be aware of is that I did it reformat and repost the charts this year. But the numbers on them for 2017, 2018, are exactly the same as they were for last year. We're calling it a catch-up year. We're recognizing that there have been some slight adjustments in some of the benefits cost. There are other ways that congregations are having to-- are having more trouble keeping up with staff payroll costs. And so we said instead of moving, adjusting the numbers a little bit, we're going to just leave them the same.

And because we're leaving them the same, nobody has to worry that something is going to move while they're doing their budget. And so what we're asking congregations to do is, OK, now you know, the numbers are just going to stay exactly as they are. And we're inviting congregations to really take a look at all of your staff salaries. There's a new guide to setting salaries that has come out with those charts to really make sure that congregations understand the intent of the ranges that we post for the different positions and how to use the guidelines well.

Our whole compensation program is under a longer review. So taking a bigger look at what our guidelines should be, not just for salaries, but for all of our benefits, things like time off. For instance, right now, we don't have anything about parental leave as part of our compensation guidelines. So that might be something we would add. So there are any number of things that we're trying to figure out. What should our recommendations really say, more broadly. In terms of congregations as employers, I'm looking at kind of an employer of choice model. I don't know if that's your language to you. People would probably have pointed to IBM some time back, now it might be Google. It's that place that everybody knows is a fantastic place to work because, why? Well, it has something to do with salaries and benefits. But it's almost always something beyond that, around workplace culture, around special fringe benefits. It's an attitude.

And I think that our congregations really have a wonderful opportunity to live in into being meaning making entities, and to really lift up their values through their employment. So I'm going to be working on an employer of choice checklist or framework for congregations to think about as they look at their staff and their role as employers. Staffing practices, well, I'm working on job descriptions. That's one thing. We don't have any recent-- just sort of here's what we would expect, a basic DRE position to look like. So I'm trying to come up with some.

And we've gotten some help from a volunteer with HR experience. So I'm hoping to have posted some job description templates that congregations could then customize. I'm working on an onboarding checklist. So probably used mainly by the administrator. And it's not just going to be a formal like make sure the person has they're W4 form filled out. But really some additional good practices for the first day, and first week, and before hire. Make sure their email is set up, or all kinds of little things, just to make sure that staff are getting off to a good start.

We're also-- right now, Richard Nugent my supervisor, the director of our office, is working on updating the employment agreement for ministers. And once that one is settled, we're going to use that as a template for other religious professional positions. Because it's been quite a while since we came out with a model for an employment agreement for non-clergy. So those are just some of the things that we're looking at this year over the next few months.

PAT KAHN: Great, thanks Jan. So one of the things that we have, obviously, in common, is a shared goal to help religious professionals thrive in their work. And sometimes, the lines, as you can see on the screen, between our areas, get blurred. So there are a couple of different things where our work is shared, and one of those is transitions. My focus in the topic of transitions is working with individual congregations or individual religious professionals, whether musicians or religious educators, who are in transition and want some information or to talk about that.

I've also been spending some time talking with the Guild of Interim Religious Educators, known as GIRE. They now have a website up, and they are in the process of further developing that, so that there will be an area where people who do identify as an interim religious educator will be able to post their profiles so that-- probably one of the most frequently asked questions I get is how many interim religious educators are there, and where are they, and how to contact them.

And so obviously, working with the Guild will be a very handy way to make that information available. And regarding transitions, as well, RE Credentialing questions. Sometimes I've had ministers call to say can you tell me how many credentialed religious educators there are, or how can we worked towards getting a credential religious educator in transitions.

JAN GARTNER: Great, and my work tends to be a little more systemic, things that would apply to many congregations. Some of you might be familiar with a document called "From Staring to Parting." it's actually an update and sort of expansion of the search for our RE leadership, that was originally produced by Laredo on many years ago. And later became a product of the UUA. And so that followed me. I wrote it when I was in the Professional Development Office a few years ago. And that document has followed me into my new office. So I'll continue to use "From Starting to Parting." to try and outline good practices for our congregations as employers around transitions.

I'm also-- the other specific piece that I'm continuing with in my new role, that I started in my old role, was the online interim training for religious professionals. This is a six-week program. It originally was on site, and it was religious educators, and it was just for religious educators who were actually entering interim positions. It's now open to all religious professionals. It's online, and we're happy to have people who are just interested in interim work, or very often, what we get are people who are going to be working with an interim minister and they want to better understand what's meant by the interim process for that reason. So it was felt that that was another-- managing transitions well and having staff that are well grounded in the purpose of the interim time was very much for a good match with my new role of looking at staffing practices and good protocols for congregations. So that's another piece I've held onto.

PAT KAHN: And both of us, obviously, have partners, congregational life staff in all five regions, some of whom very specifically how the portfolio of transitions. And in other regions, they've managed that differently. We have partners in the professional organizations, Loreda. And I should mention that Leah Purcell, who's on our call tonight, has the professional development portfolio on the Loreda board. So I talk to her quite a bit. And also, the UU Musicians Network, and as I mentioned before, the GIRE, Guild of Interim Religious Educators, all of them have pieces related to transitions. There's many hands trying to manage that process.

And we also have shared work, thinking about the staff relations and staff teams. I am on the Shared Ministry Task Force, which once again, Leah Purcell is also on the Shared Ministry Task Force as a representation from Loreda board. And we're just at the tail end of finishing up some work on resources. And there is in the chat box right now a link to the Leadership Development page on the UUA website, under staff teams, which has a report, the original Excellence in Shared Ministry report that came out of the joint work of Loreda, and the Musicians Netork, and the Ministers Association Several years ago.

There are resources available online. And very soon, there will also be a new link because there's a new tool that we'll be introducing. And there will also be a conversation on Ministry Days, Tuesday, before General Assembly that is a collegial conversation that UUA is sponsoring. However, Loreda and Musicians Network are also invited there. So we hope we'll see a lot of people there. And then, Jan--

JAN GARTNER: Yeah, so again, my piece around staff relations, staff teams, is kind of, again, kind of the sound practices for congregations, really thinking about good protocol relating to teams and the way staff interact with one another. It's actually amazing how closely that fits with employment issues that come to our office. A very common situation, just as an example, is a minister has negotiated a fairly rich package for themselves. And they're within fair compensation guidelines, and they get certain benefits paid for by the congregation, and/or maybe other staff, other professional staff, other fulltime professional staff, that don't nearly have that kind of robustness to their benefits package.

And so it leads to questions about how does that influence the relationships and the concept of being a team and supporting each other. So we've really tried to work to see staff relations and teams as integral to the work of the office of church staff finances. I also just want to quickly mention Jennifer Halperin. I have a go-to contact in each of the professional organizations, and that's the person who lets me know about good communication vehicles for that organization, helps me strategize around getting the word out about things, and is in touch with me about issues that might relate to my portfolio in their area. So for Loreda, it's Jan Halperin. And for instance, she's the person who is looking over the job descriptions in RE area before they post them. She's my contact for that.

PAT KAHN: Great, thanks Jan. And as Jan said before, if you aren't sure, contact either of us or both of us. If it is a question that maybe part mine, and maybe Jan's, if you email me and I think Jan needs to be in on it, I will send that to her and vice versa. So we have a lot of ongoing conversation around all kinds of topics. And now, we have time for questions, and hopefully, answers. We should have plenty of time to address everyone's questions. So if you'll take a minute and type it in to the chat box, we'll go ahead and answer those. And Jan, I guess I will kick off the--

JAN GARTNER: Anything about our portfolios, it doesn't have to be which one of you should I call. It can just be anything you think we can help you with.

PAT KAHN: Great, so Leah is asking when should we go to you and when to go to a good officer? You want to take that one, Jan?

JAN GARTNER: And probably either of us could take this. I mean, I do find myself saying to somebody this sounds like a good thing to run by a good officer. Now, of course, Pat and I have both been good officers. So it's hard to get out of that mentality. And so certainly both of us at times would find ourselves starting to strategize with somebody around how to work through an issue related to getting into RE Credentialing or something about their benefits, or whatever. I would say it may be a good idea to contact me to make sure that you're on solid footing with what it is, say that you were thinking you should be advocating for.

Like this job scope isn't really reasonable for 20 hours. I'm consistently putting in 35. And I might be able to get you started on that. And I would probably want to hand you off to a good officer who could really help you think through your process for approaching in the congregation. What would you say, Pat?

PAT KAHN: Yeah, I was going to say essentially that same thing. If you look at it from the perspective of is it a question related to an individual religious educator? Then, most likely you would contact me. And I would also say the same thing, have you talked to a good officer? And if it's something, just as Jan said, where it's really about the religious educator's or the musician's role in the congregation and it's more of an employment issue, then it would be Jan. And she would say the same thing. And Corrine asked good officers are assigned by region, correct? They are, however as Leah is saying, you can contact any good officer. It does not have to be a person in your region or in your district.

JAN GARTNER: And sometimes it's nice to kind of cultivate a relationship with the good officer in your area, so if something does come up, you feel like you're talking to somebody that you're already in relationship with. And then there are times when you just think, you know what, I want to talk to somebody that doesn't know me and my congregation already, and just get completely fresh spin. And you could even find out from the lead good officer, or if you're talking to one of us, ask us. Maybe you're in a large congregation, or you're working with an interim minister or something like that. And we might be able to say, oh, here's someone on the good offices list who's really experienced in large congregations, or has worked with a couple of good interim ministers. But, yeah, you can call anybody.

PAT KAHN: Right, and I see that Leah has already put up the website, the Loreda website for the list of good officers. But I want to go back quickly to Judith's question of is there an equivalent to good officers for non-RE or ministerial staff? Well, obviously, ministerial staff, the UUMA also have good officers, and the Musicians Network also has good officers. And there's now UU-AMP, UU Association of Membership Professionals, that's a new professional organization. And there is a professional organization for UU administrators of congregations. I do not know if the those last two have specifically good officers, but I know that they have the starts for professional organizations. So I think pretty much most professional staff in congregations have someone that they can go to.

JAN GARTNER: Yeah, and I'll add to that by saying the administrators listserv is very active. I think it's more active than Loreda listserv. I mean, just all kinds of questions come up on there. And sometimes they're a little dicey professional situation things. And people know I'm on the list. And I often will get a private email from an UUA board member saying do you want to reach out to this person or should I do it. So they're really great about when they see something, there's usually like three or four of us who will get copied, and like somebody should call this person. So the leadership or the Administrators Association is really good about reaching out, even though they don't have a formal-- and I think UU-AMP is probably largely like that too. They're pretty close knit, and there are few people that are looking out for the health of the group and the individual situations.

PAT KAHN: Right, great. And so Leah has another question for you, Jan. Do you see your work with sabbaticals overlapping or supporting the Laredo sabbatical handbook? Good question.

JAN GARTNER: Yeah, and I want to make sure we don't miss something that was above that. I have read through most of the information, believe it or not, in the Laredo sabbatical section, which is awesome. And in fact, lots of times there is information, and you kind of see it's 10 or 15 years old, and you go, oh, gosh, should I tell people about this, nobody's looked at it for 10 years. But there's a lot of very excellent stuff. So that's an area where I'm pretty comfortable saying to people they haven't updated it recently, but there's some very good information about sabbaticals on the Laredo website, even for non-Laredo people, like if a musician asked, I might direct them there too. So I don't know if that's answering your question. If you're asking if I'm like a partner with you, Leah, in working on sabbatical issues, I would say yes. So we could talk about that.

PAT KAHN: Right. These are all great questions.

JAN GARTNER: Yeah, did we miss--

PAT KAHN: Yeah, Judith was just clarifying, because I misunderstood when she said ministerial staff, non-ministerial staff. So, yeah.

JAN GARTNER: So Corrine writes as a new DRE, I should reach out to cultivate that relationship before I have an issue. She's asking good offices. And I know it works really differently in different places. When I was a good officer, I would send a little something out to all of the-- in fact, that's like a real good selling point for Laredo as an organization. I would send a little thing out to all of the religious educators in my territory, and say, hey, you know this is one of the benefits of Laredo membership. And once in a while, somebody would just-- and I would say, I invite you to call me and get to know me when nothing's going wrong, just so we know each other.

And once in a while, somebody would do that. And often, there was just like a little something that they wanted to check out. Like, I'm really just calling to say hi and meet you, but you know what-- you know, there's always that little niggling thing that they might ask about. And that's a great-- it could be a little conversation starter. Oh, and I think congregations hear info from the UUA more easily than from a professional organization.

We have those conversations with ourselves, Leah. Like whose buy-in do we need? Who's the information coming from? How do we- and so like in the case of Laredo, Jennifer and I, Jen Halperin and I might bounce around-- if we're directing something to Laredo members, how do we make that message as powerful as it can be? If it's something that's going out to congregations, who should they be hearing that from? So, yeah, that's a great-- that's an interesting, ever-present dynamic.

PAT KAHN: Absolutely. Well, it looks like there's no more questions. But if you think of one, obviously, after the webinar, don't hesitate to contact either one of us. Jan, a question, are you involved in archiving any old curricula?

JAN GARTNER: I would say if anybody, it would be Pat.

PAT KAHN: Well, yeah, but I'm aware that the FASS Center at Meadeville has been working for a couple of years actually of archiving old curricula. So that's exactly where I will send you to, because I don't archive any old curricula and the Faith Development Office doesn't do that.

JAN GARTNER: And Leah, did you post on that recently, the guide for ranges? I want to make sure I'm answering the right question. There's a guide to using the salary recommendations or something like that. It starts with the word guide. And it's on the same main page with the GO indices and the salary range things, all the salary-- all the things to set someone's salary properly are on that same page. I've started a new publication that I might have referred people to. It's called Compensation and Staffing News. It comes out monthly and has little updates and tips on human resources and staff related issues. So I know I have posted about it there. I don't know if this is helping.

PAT KAHN: Sounds good. All right. Well, with that, I would like to share some closing words for us before I turn it back over to Kareem. these are words from Companion to Singing the Journey, Lifting our Voices, Sobonfu Some. Community is the spirit, the guiding light of the tribe, whereby people come together in order to fulfill a specific purpose, to help others fulfill their purpose, and to take care of one another. And I'll invite Kareem to come back on and tell you a little bit more about our upcoming webinars.

KARIEEM: Thank you, hello again. First, before I say anything, I want to thank you both, Pat and Jan for taking time out this late evening to make sure individuals know who to call for your respective portfolios and to provide support for our constituencies and all our payers who work with and around the UUA. So our upcoming webinar, our April session, we'll be talking about innovation and religious education and faith development. We'll be recapping the UUA's 2016 roundtable, and also talk about some new innovations and initiatives at the UUA and the Faith Development Office will be working on. Our host will be Jessica York and we'll be having panelists Tracy Beck and Joy Berry. So you can register online at our religious education webinars page. And you can register for either the Tuesday, April 18th at 1:00 p.m. In the afternoon webinar, or Wednesday, April 19th, in the evening at 9:00 p.m. both Eastern time.

With that, that brings us to the end of our webinar. Thank you everybody for coming out at this time to hear us out. We really appreciate it. In a few days, hopefully, early next week, we'll have the recording as well as resources and other things, such as transcripts, posted on our webinar page for you to check out again if you like. So, thank you.

JAN GARTNER: Thank you.

PAT KAHN: Great, thanks a lot for coming.

JAN GARTNER: Thanks everybody.