

Northern New England District

Of Our UUA

I.

Congregational Leadership Survey Highlights

April 6, 2019

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On behalf of the NNED Board
April, 2019*

Table of Contents

<i>Page</i>	<i>Title</i>
<i>Background</i>	
3	<i>IIA. Background</i>
3	<i>IIB. Purpose</i>
4	<i>III. Questions Asked</i>
5	<i>IV. Congregational Board Engagement</i>
<i>Summary of Findings</i>	
6	<i>V. Results by State and Size of Congregation</i>
7	<i>VI. Concerns of Your Board Not Raised Above</i>
8	<i>VIII. Congregational Use of Regional and District Resources, Past Two Years</i>
10	<i>IX. What We Learned</i>
10	<i>X. Next Steps</i>
<i>Appendix</i>	
11	<i>Participating Congregational Boards</i>
12	<i>Survey Questionnaire</i>
14	<i>Answer Sheet</i>

IIA. Background

- | | |
|---|-----------------------------|
| 1. <i>NNED staff became Regional staff, reporting only to Our UUA</i> | <i>July, 2015</i> |
| 2. <i>NNED Board committed to continuing as a District, With a mission of keeping our congregations connected with our larger faith, as they had been when we had District staff.</i> | <i>FY 2016 - now</i> |
| 3. <i>NNED Board realized over time that as a volunteer board, with very capable but part-time staff, they could not successfully fulfill that mission. As a result, after long and deep consideration, they recommended dissolution of the District.</i> | <i>Annual Meeting, 2018</i> |
| 4. <i>NNED Board engaged UUs from all 3 states in conversation about their successes and concerns engaging with our larger faith.</i> | <i>April-June, 2018</i> |
| 5. <i>NNED authorized survey of congregational boards to understand the depth to which successes and concerns raised in the spring meetings were more widely shared in the District.</i> | <i>Fall, 2018</i> |
| 6. <i>Survey implemented with congregational boards. Boards were contacted in December-March and asked to take 15 minutes of a Board meeting to respond to the survey questions.</i> | <i>January-March, 2019</i> |

IIB. Purpose of Survey

To understand the depth of successes and concerns raised in the meetings held in spring, 2018, were shared throughout our congregations in Maine, New Hampshire and Vermont.

III. Questions Asked

1. Rank order successes and concerns highlighted in the spring, 2018, meetings.
2. List additional successes and concerns specific to your board, not raised in the spring, 2018 meetings.
3. Rank order endowment fund possibilities if dissolution is decided by a 2/3 majority vote of delegates at a duly called District meeting with a quorum present.
4. List congregational engagement with District and Regional resources over the past 2 years.

IV. Congregational Board Engagement by State and Size

1. Just about two-thirds of our congregational boards in Maine, New Hampshire, and Vermont participated in this survey. This is an extraordinary level of participation, for which we are deeply grateful.
 - a. The smallest congregation: The Federated Church of Marlborough, NH., 3 UUs
 - b. The largest congregation: First Parish in Portland, ME., UU, 335 UUs
2. Distribution of participant congregations by state (total: 45)
 - a. Maine 8 in 10 congregations participated
 - b. New Hampshire 7 in 10 congregations participated
 - c. Vermont 6 in 10 congregations participated
 - d. Unknown state 1 congregation
3. Distribution of participant congregations by size (total: 42):
 - a. Under 100 members 6 in 10 congregations participated
 - b. Between 100 and 149 members 7 in 10 congregations participated
 - c. 150 members and above 8 in 10 congregations participated
 - d. Unknown size 3
4. Because the data base is well under 100; results are reported as tendencies, and not as percentages.

V. Results by State and Size: Question A.1

Question A.1: Importance of Congregational Services Provided by New England Regional staff and volunteers:

In the spring, 2018, meetings, 14 support services came up more often than others as important services to our NNED UUs. In order to facilitate wider ranking of these support services, the 14 were grouped into four categories:

- a. *Support for transitions in congregational religious professional staff,*
- b. *Support in development of good congregational governance,*
- c. *Specialized congregational support,*
- d. *Communications concerns raised.*

The four sections below highlight the results of congregational board rankings in each category.

A.1.1: Support for transitions in congregational religious professional staff:

- a. *Coaching during staff transitions,*
- b. *Expert help in navigating the UUA ministerial search process,*
- c. *Religious educator credentialing.*

7 in 10 congregations rated expert help in navigating the UUA ministerial search process as their first priority in this category, regardless of state or size.

A.1.2: Support in development of good governance:

- a. *Counseling and guidance in times of crisis,*
- b. *Leadership development workshops or start-ups, geographically nearby,*
- c. *Leadership development webinars (on line),*
- d. *Staff specialists in small and rural congregations.*

Half the congregations rated counseling in times of crisis as their first priority in this category. About two in ten each chose leadership development workshops nearby and staff specialists in small and rural congregations.

Congregations under 100 members were slightly more likely to rate specialists in small and rural congregations first, but still their emphasis was on counseling in times of crisis.

A.1.3: Specialized congregational support and outreach:

- a. *Capital campaign support,*
- b. *Counsel around joint ministries,*
- c. *Staff support for issue-based social action network,*
- d. *Continuation of Chalice Lighter Program.*

Congregational responses were fairly evenly divided between these four possibilities, with around two to three in ten selecting each, regardless of state or size.

A.1.4: Communications concerns raised:

- a. Having a staff contact person who knows our congregation,
- b. Connections with other congregations facing similar issues,
- c. Better communication about staff support available to congregations.

Just about a third of congregations in all three states selected each of these possibilities as their first priority.

About half the congregations with under 100 members chose connections with other congregations facing similar issues as their first priority.

VI. Concerns of Your Board Not Raised Above, Question A.2

The survey included an open-ended question asking each board to specify any particular concerns it had about support in the event of dissolution.

Half the participating congregational boards raised at least one concern; then again, half did not.

Staff support concerns focused on loss of voice, recognition, knowing whom to call, including the following verbatim responses:

We'd like an annual visit

Weakening our voice in the UUA machinery at a distance

Especially as a small, rural church

Who to call, who to be our contact person

Last time we tried reaching out, we got no response

Needs of many local churches will be forgotten, especially the needs of small congregations

Direct support to Board, so minister doesn't have to be in the middle,

Guidance in new ministry start-ups and sabbatical planning,

Support in the event of Board-Minister misunderstandings or conflict,

Offer a list of whom to call in what circumstances.

We will get lost, we will not be known by staff.

There will be less focus on small congregations.

We do not want to lose the sense of support and community we have in the District.

We are concerned about smaller and rural congregations losing touch with the UUA.

We would welcome more direct contact from the regional office.

It would be good to have regional staff who could offer a pastoral perspective for congregational ministers.

Financial concerns were raised by some boards:

Fear our NNED invested funds will be diverted elsewhere

Financial support for attendance at conferences, including youth; home hospitality 3

Regional workshops will be too far away to be affordable

Financial support for pulpit supply ministers for small congregation

Fundraising (Website help for success), Managing church budget shortfalls

We propose to amend the dissolution clause in the bylaws to allow funds in the district endowment to be returned to a designated body in the state from which they originated.

Specialized types support were also raised by some boards:

*Grant writing,
Tech support; IT; social media; live-streaming services, website development,
Help with background checks,
Support for lay speaker “bureau” for Sunday services,
Expert advice on facilities issues; affording maintenance of large, aging buildings.*

VII. Financial Concerns Around Dissolution

The NNED is a New Hampshire nonprofit corporation. The Secretary of State of New Hampshire directs that a New Hampshire nonprofit corporation must include in its Statement of Dissolution the plan for distribution of the corporation’s assets and satisfaction of its obligations. That plan must be approved by a 2/3 majority at a duly called meeting of its membership at which a quorum is present. In our case, that would be the delegate body sent to the duly called meeting by our congregations in Maine, New Hampshire, and Vermont.

The NNED Board learned of four options other Districts of our UUA had considered for distribution of their assets in the event of dissolution, and asked our congregational leaders to select the one they thought best for our District:

- a. Restrict beneficiaries to NNED congregations in perpetuity,*
- b. Restrict beneficiaries to NNED for a period of years (say between 3 and 10; to be determined),*
- c. Restrict beneficiaries to the New England Region for a period of years (say between 3 and 10; to be determined),*
- d. Allow our UUA staff to benefit congregations as they deem best serves our faith, ensuring donor intentions are honored.*

Just about half our participating congregational boards selected restricting beneficiaries to NNED congregations in perpetuity.

Somewhere between 2 and 3 in 10 thought our UUA staff should be allowed to benefit congregations as they deem best serves our faith, ensuring donor intentions are honored.

VIII. Congregational Use of Regional and District Resources, Past Two Years

Participating congregational boards were asked to list all District and Regional trainings, workshops, webinars, annual meetings and gatherings, and specialized services they were aware of that they, their staff, or members of their congregations had used in the past two years.

Just about 8 in 10 of our participating congregations had availed themselves of Regional or District Resources, in a number of cases listing several workshops or services provided.

Some listed resources used over more than the past two years, and all resources mentioned have been included in this list. Responses have been collected following the highlights of the spring meetings of 2018, wherever possible.

<i>Support for Transitions</i>	24
<i>Coaching during staff transitions</i>	6
<i>Transition Coach</i>	2
<i>Exit interviews</i>	3
<i>Help navigating ministerial/interim search process</i>	11
<i>Compensation Consultant</i>	2
<i>Religious educator Support</i>	12
<i>RE curricula/Religious Exploration support</i>	7
<i>LREDA clusters/trainings</i>	2
<i>Renaissance Modules</i>	1
<i>RE Staff Transitions support</i>	2
<i>Support in Development of Good Governance</i>	66
<i>Counseling and guidance in times of crisis</i>	10
<i>Safe Congregations/Disruptive Behavior</i>	2
<i>Leadership development workshops or start-ups nearby</i>	42
<i>Church staff finances/Invested Fund UUA Management</i>	3
<i>Generosity and Stewardship</i>	
<i>Congregational Leadership Retreat</i>	5
<i>Spiritual Leadership</i>	7
<i>Going to the Heart of It</i>	1
<i>Legacy Giving</i>	1
<i>Accountability within the church</i>	1
<i>RE event nearby</i>	1
<i>Singing/music workshop</i>	4
<i>Staff delegating and boundaries workshop/staff support as team</i>	3
<i>Social Media workshop</i>	2
<i>Pastoral Care workshop</i>	1
<i>Administrator cluster</i>	1
<i>Muslim-Christian dialogue</i>	1
<i>Healthy and Relevant Youth Ministry</i>	1
<i>White Supremacy</i>	2
<i>Ministerial leadership programs</i>	2
<i>Black Lives Matter</i>	2
<i>Board Retreat</i>	3

<i>Beyond Categorical Thinking</i>	1
<i>Racial/social Justice with Meck Groot</i>	2
<i>Preaching</i>	1
<i>White Supremacy</i>	
<i>Welcoming Congregation</i>	
<i>Leadership development webinars (on line)</i>	8
<i>Worship web</i>	1
<i>Part-time staff, full-time church</i>	2
<i>Centering the Margins</i>	2
<i>Staff specialists in small and rural congregations</i>	7
<i>Workshop by Karen Bellavance-Grace</i>	4
<i>Living into our Covenant 2</i>	2
<i>Small Congregation workshop</i>	1
<i>Publications</i>	3
<i>“From Starting to Parting”</i>	
<i>Creating covenants</i>	
<i>UUA Common Book Reads</i>	
<i>Brochures and reading for new members</i>	
<i>Wayside Pulpit signs</i>	
<i>Regional or District Assemblies and workshops</i>	13
<u><i>Specialized Congregational Support and Outreach</i></u>	<u>9</u>
<i>Capital campaign support</i>	1
<i>Counsel around joint ministries</i>	1
<i>Staff support for issue-based social action networks</i>	2
<i>Continuation of Chalice Lighter Program</i>	1
<i>Other:</i>	6
<i>UU Musicians Network</i>	1
<i>Maine UU Social Action Network</i>	1
<i>Church security</i>	1
<i>Long-term planning/financial planning</i>	2
<i>Downing Trust</i>	1
<i>Communication Concerns Raised</i>	2
<i>Having a staff contact person who knows our congregation</i>	1
<i>“Not sure who to talk to.”</i>	1
<i>Connections with other congregations facing similar issues</i>	
<i>Better communication about staff support available to congregations</i>	1
<i>“We might have accessed individual staff support more if we had a clearer sense of what they brought.”</i>	

Belfast: “I can’t say enough about our UUA NER staff!! They have been invaluable to us, and to our collaborative ministry with the churches in Ellsworth and Castine.”

IX. What Have We Learned

1. *A strong majority of our congregational leaders are very responsive to outreach from our NNED Board and our New England Region staff. Thank you for your faithfulness!*
2. *The most important areas of support desired, across state and size include:*
 - a. *Expert help navigating ministerial transitions and search,*
 - b. *Counseling in times of crisis,*
 - c. *Better staff contact, congregational connections and communication about staff support.*
3. *The importance of being known by and knowing staff was underscored when boards were asked to express their own concerns, not just to respond to those highlighted in the spring meetings.*
4. *We do not have the 2/3 super majority needed to pursue any single possible path to distribution of NNED financial assets over others.*
5. *The reach of our New England Region staff into our NNED congregations, and the reach of our NNED congregations to our New England Regional staff has been deep, wide, and hugely successful in almost all cases.*
6. *Support in times of transition and support in development of good governance, through leadership development trainings, workshops, and start-ups or retreats are the services our congregations have used most often over the past few years.*

X. Next Steps

1. *Our NNED Board needs to work with our New England Region staff to discover ways to deepen connections between our excellent staff and our faithful congregations.*
2. *Our NNED Board has assigned a sub-committee to undertake detailed research into the specific restrictions to our endowment funds. There are 14 boxes of Maine, New Hampshire, Vermont, Northeast District, New Hampshire-Vermont District, and Northern New England documents to be carefully reviewed to create a complete and accurate of fund restrictions and their implications for fund distribution at the time of dissolution. This will be exacting work, necessary to ensure everyone understands the status of our NNED assets.*
3. *When that work has been successfully completed, the NNED Board will explore what possible allocations of those resources would best honor the intentions of our donors AND best serve our faith and our congregations.*
4. *The NNED Board will present those options at a duly called delegate meeting to determine whether a super majority will coalesce around any one particular option; or whether there are other options that might be better suited to the needs of our congregations and our faith.*

APPENDIX

Participating Congregational Boards

Maine

Auburn
Augusta
Bangor
Belfast
Brunswick
Castine
Damariscotta
Ellsworth
Norway
Pittsfield
Portland (A2U2)
Portland, First Parish
Saco & Biddeford
Sanford
Sangerville Dover-Foxcroft
West Paris
Yarmouth
1 Unknown City

New Hampshire

Kearsarge (Andover)
Concord
Durham
Exeter
Franklin
Keene
Laconia
Manchester
Marlborough
Milford
Nashua
Peterborough
Plymouth
Tamworth
West Chesterfield

Vermont

Bethel
Chester
Jericho
Middlebury
Montpelier
Norwich
Rutland
St. Johnsbury
Strafford
West Brattleboro
Woodstock

And one unknown city and state or congregation name.

NNED Congregational Board Survey
From your NNED Board of Directors; January, 2019
*(please provide your responses on the answer sheet included,
and return by email or US Mail; addresses are on answer sheet)*

Introduction *(please read to your Board)*

As you may know the dedicated staff of our 4 New England Districts united to become the UUA staff of our New England Region of UU congregations in 2015. Since then, the Clara Barton and Mass Bay Districts have dissolved, meaning they voted to give up being individual districts in favor of being part of the New England Region.

Last April, at our NNED Annual Meeting, our District Board recommended we also dissolve our district structure. Their primary reason was that the Board's mission, to serve the needs of NNED congregations, was already being better served by our regional staff than our volunteer Board, with only one part-time administrative assistant, was able to do. Concerns articulated by our NNED Board and our NNED congregations around the possibility of dissolution focused, primarily, on how the needs of our congregations would be met if the District were to dissolve, and what would become of our NNED invested funds, most particularly those having restrictions.

These issues were brought up at the 3 assemblies (one in each NNED state) and one zoom meeting our NNED Board held last spring, which were open to all NNED congregants. 63 dedicated UUs from all 3 states participated in those meetings, and the questions below reflect their questions and concerns.

Your District Board is hoping to learn, from this survey, which of the concerns raised last spring you think are most important to your particular congregation. Your answers will ensure your concerns will be addressed as the NNED Board and UUA staff discuss whether and how dissolution could best serve our NNED congregations.

A.1. Importance of Congregational Services Provided *(Please record your responses on the answer sheet provided)*

Each of the following services, currently provided by New England Region staff and volunteers, was mentioned as important by folk participating in last spring's meetings. They are grouped into four areas:

Support for transitions in congregational religious professional staff,
Support in development of good congregational governance
Specialized congregational support
Communications Concerns Raised

Please rank order each of the services in each of these groups, with #1 being the one you think is most important, and #3 or #4 being the one you think is least important. *(Please rank each service in each grouping and record your responses on the answer sheet provided.)*

Support for transitions in congregational religious professional staff

Coaching during staff transitions
Expert help in navigating the UUA ministerial search process
Religious educator credentialing

Support in Development of Good Governance

Counseling and guidance in times of crisis
Leadership development workshops or start-ups, geographically nearby
Leadership development webinars (on line)
Staff specialists in small and rural congregation

Specialized Congregational Support and Outreach

Capital campaign support
Counsel around joint ministries
Staff support for issue-based social action networks
Continuation of Chalice Lighter Program

Communications Concerns Raised

Having a staff contact person who knows our congregation
 Connections with other congregations facing similar issues
 Better communication about staff support available to congregation

A.2. Concerns of Your Board Not Raised Above *(Please record your answers on the answer sheet provided.)*

If your Board has important concerns that you have not seen in the responses from the spring meetings above, please describe that/those concern/s briefly in the answer sheet attached.

B. Financial Concerns around Dissolution *(Please record your answers on the answer sheet provided.)*

Many of the funds administered by the NNED and by the UUA on behalf of the NNED are unrestricted, meaning the income can be used in whatever way the Board and staff think best to strengthen our congregations in northern New England. However, some are restricted regarding how the income can be used. Law requires that not-for-profit organizational bylaws include a dissolution clause stipulating the “successor organization” to which the funds should go upon a vote to dissolve.

As our faith has evolved, these successor organizations have changed. Unitarian and Universalist organizations became Unitarian Universalist organizations with the 1961 merger. The Northeast District (Maine) and New Hampshire-Vermont District became the Northern New England District in 2008.

Our NNED bylaws state that “without successor organization(s), there will be a transfer of the investment of assets to our UUA with language guaranteeing that “such transferred assets be held and used exclusively for the congregations within the former District, wherever within that area, and however those assets and their income are determined to be most needed by our UUA.”

Our history of denominational and geographic consolidation suggests we might want to offer the UUA more generous guidelines than currently stated in our bylaws, and some folk in the spring discussions agree. Others believe the existing bylaw should be strictly respected. Please record on the answer sheet the possibility listed below that your board thinks is the right thing to do, should our congregations vote to dissolve the District:

Restrict beneficiaries to NNED congregations in perpetuity,
 Restrict beneficiaries to NNED for a period of years (say 3 - 10; to be determined),
 Restrict beneficiaries to the New England Region for a period of years (3 - 10; tbd),
 Allow our UUA staff to benefit congregations as they deem best serves our faith, ensuring donor intentions are honored.

C. Your Congregation’s Use of Regional and District Resources *(Please provide answers on the answer sheet.)*

Finally, our New England Region staff and volunteers and our NNED volunteers offer many trainings, webinars, district or regional gatherings, and specialized services to individual congregations. Please list on the answer sheet, under question C all the events, trainings, or consultations your congregation, or members of your staff and congregation, have used (that you’re aware of) in the past 2 years.

Please return answer sheet a) by email to nnedadmin@comcast.net; or b) by US mail to NNED, POB 91, New Ipswich, NH. 03071.

Your NNED Board is deeply grateful for and appreciative of your taking the time to complete this survey. Thank you very much.

NNED Congregational Board Survey

Answer Sheet, January, 2019

Thank you very much for your participation; it matters a lot!
*(when complete, please return by email to nnedadmin@comcast.net, or
 by snail mail to NNED, POB 91, New Ipswich, NH., 03071)*

Congregation name, city/town, state:

Contact person and email/phone:

A.1 Importance of Congregational Services Provided:

Support for transitions in congregational professional religious life

Coaching during staff transitions:
 Expert help in navigating the UUA ministerial search process:
 Religious educator credentialing:

Support in Development of Good Governance

Counseling and guidance in times of crisis:
 Leadership development workshops or start-ups, geographically nearby:
 Leadership development webinars (on line):
 Staff specialists in small and rural congregations:

Specialized Congregational Support and Outreach

Capital campaign support:
 Counsel around joint ministries:
 Staff support for issue-based social action networks:
 Continuation of Chalice Lighter program:

Communications Concerns Raised:

Having a staff contact person who knows our congregation
 Connections with other congregations facing similar issues
 Better communication about staff support available to congregations

A.2. Concerns of Your Board Not Raised Above *(Write in your responses; taking as much space as you need on line, or the back of this sheet if using hard copy.)*

B. Financial Concerns around Dissolution

Restrict beneficiaries to NNED congregations in perpetuity:
 Restrict beneficiaries to NNED for a period of years:
 Restrict beneficiaries to the New England Region for a period of years:
 Allow our UUA staff to benefit congregations as they deem
 best serves our faith, ensuring donor intentions are honored:
 No answer (we don't feel qualified to respond):

C. Your Congregation's Use of Regional and District Resources *(Write in your responses; taking as much space as you need on line, or the back of this sheet if using hard copy.)*