District Services Report to the President

Our History, Current Challenges, & Dreams for the Future

Created by the Transitions Taskforce

Members include Sue Sinnamon (Convener), Tom Chulak, Harlan Limpert, Cilla Raughley, Joan VanBecelaere, and Doug Zelinski

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UUA DISTRICT SERVICES REPORT TO THE PRESIDENT

Created by the Transitions Taskforce to provide an introduction of District Services to the new UUA president. Taskforce members: Sue Sinnamon (Convener), Tom Chulak, Harlan Limpert, Cilla Raughley, Joan VanBecelaere, and Doug Zelinski

INTRODUCTION

from the Reverend Harlan Limpert, Director for Congregational Life

The members of the district staff team, one subgroup of the staff group called Congregational Life, are proud to be serving the cause of Unitarian Universalism. It is our highest allegiance, followed by our commitment to the Unitarian Universalist Association of Congregations, and then followed by our love for and commitment to the staff group called Congregational Life.

(Note: District Services has recently become part of the new Congregational Life staff group which will also include Congregational Stewardship Services, Growth Services, and Services to Large Congregations. The term "District Services" will be used throughout this document since it was created before the new staff group was formed.)

Without exception, members of the district staff see their jobs as *ministry*. Whether ordained or not, they see their roles as leaders, consultants, advocates, and educators in our community of congregations as the particular expression of their ministry to our larger faith. It is their source of joy and satisfaction.

It is our hope that this brief overview, this introduction to District Services, will give the next president of the UUA a clearer understanding of our history, our current status, and our hopes and dreams for the future as we continue to serve our faith with passion, commitment, and love.

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THE DISTRICTS

Districts are localized bodies of the UUA established to decentralize certain responsibilities.

Formal Relationship

The UUA is an association of more than one thousand congregations that voluntarily combine a portion of their resources in pursuit of common goals. To do this, they have legally incorporated and govern their affairs via an annual General Assembly of congregational delegates. At the same time, they have empowered a UUA Board of Trustees to set goals and to collect and expend resources on their behalf. Similarly, they have divided themselves into 19 Districts also able to legally incorporate with boards of trustees that set goals and collect and expend resources within their own boundaries.

The General Assembly determined that the district components of their Association are to be semi-autonomous – though they are distinct entities, their bylaws are not to conflict with the UUA bylaws and they are granted autonomy "to the extent consistent with the promotion of the welfare and interests of the Association as a whole and of its member congregations" (UUA By-laws Article III). Likewise, the autonomy of the UUA Board is influenced greatly by the districts, whose elected representatives comprise the majority of its trustees.

Collectively then, the member congregations, the UUA Board, and the 19 district boards are the UUA. The national and District Services staffs work for the entire Association and are accountable to the UUA president, who is accountable to the UUA Board of Trustees. In addition, through a co-employment arrangement, the District Services staff members also work for the districts that employ them and are accountable to their respective district boards as well.

The General Assembly authorizes the UUA Board to assign each member congregation to a district. These assignments set the geographic boundaries of the districts. A congregation may change its district membership upon approval of the UUA Board and, as a result, potentially change the boundary between districts. By definition, a congregation cannot be a member of a district without being a member of the UUA. However, no rule speaks to the reverse situation.

Districts are granted certain abilities and considerations by the General Assembly and the UUA Board. (See Sidebars 1-3.) The UUA By-laws and Rules related to the formation of districts can be found in Appendix A.

Sidebar 1

Granted to the Districts by the General Assembly are the abilities to:

1. Elect one representative to the UUA Board of Trustees;
2. Submit items for the General Assembly agenda;
3. Propose amendments to Bylaws, Rules, or Business Resolutions;
4. Propose and comment on Congregational Study/Action Issues;
5. Determine how vacancies of their national board trustee positions will be filled;
6. Be consulted when the national body deliberates termination of a congregation's UUA membership.

Sidebar 2

Granted by the UUA Board are the abilities to:

1. Be consulted when determining a congregation's membership status (new, active, or inactive;
2. Be recipients of the assets of a dissolved congregation.

Sidebar 3

Coordinated with the UUA Board are the abilities to:

1. Jointly secure and share funds for programming (APF and Incentive Grants);
2. Co-employ staff (district executives and program consultants).

Mission Relationship

Although each district has its own stated purpose or mission statement, all are to be congruent with the UUA statement of purpose, which affirms the following:

The UUA exists in order to

1. Serve the needs of the member congregations
2. Organize new congregations
3. Extend and Strengthen Unitarian Universalist institutions
4. Implement its Principles

In reviewing the mission statements of each District, in addition to the above, the Districts add a fifth affirmation:

5. *Connect congregations to each other and the UUA*

By serving these five mission components while situated between the national and local levels of the Association, districts become the major medium through which congregations relate to one another and encounter the UUA. Encouraging and supporting these encounters is one of the primary roles of the District Services portion of the UUA staff.

Boundaries

Before consolidation in 1961, the American Unitarian Association was organized into nine multi-state regions referred to as councils, conferences, or regions. At that time the Universalist Church of America was organized into 16 state conventions and one multi-state convention, with all but two located east of the Mississippi River. Upon consolidation, the Interim Committee on Regional Organization recommended the creation of 21 districts that would be smaller than the Unitarian regions but larger than the Universalist conventions. They were to contain 40 to 70 geographically contiguous congregations.

Preliminary boundary lines were suggested with the understanding that congregations along those lines could choose which district to join. Rather than enforcing strict boundaries, the UUA let border congregations self-select and a process that was expected to take many years was accomplished in less than three. Since 1961, some districts have merged and some have split. (See Appendix B.)

Governance

The Carver model of governance has significantly influenced district boards. Thirteen boards are in or moving towards formalized Policy Governance. Five other district boards consider themselves "policy" boards. They focus on mission/vision and policy while leaving most of the operational details to their district executives or executive teams. One district retains a "working board" model of governance where trustees make operational decisions and even carry out the tasks of implementation.

As the UUA and district boards continue their movement away from patriarchy, their partnering with congregations appears to be supported by the policy governance model. Consistent with this model, the UUA Board acknowledged the following sources of authority and accountability in April, 2009.

1. Our member congregations
2. Current and future generations of Unitarian Universalists
3. The heritage, traditions, and ideals of Unitarian Universalism
4. The vision of Beloved Community
5. The Spirit of life, love, and the holy

During the same meeting, the UUA Board adopted the following Shared Vision and Ends Statements.

> Grounded in our covenantal tradition, the member congregations of the Unitarian Universalist Association will inspire people to lead lives of humility and purpose, connection and service, thereby transforming themselves and the world.
>
> 1. Congregations that unlock the power that transforms lives
> 2. Congregations that live in covenant with other congregations in our Association
> 3. Congregations that move toward sustainability, wholeness, and reconciliation
> 4. These are all at equal priority and are to be achieved within a justifiable cost.

In the near future, district boards will need to consider the impact of these UUA Board ends on their own visions, missions, and goals.

Resources and Partnerships

A partnership exists between the District Services team and the larger Association that is both cumbersome and, ironically, a model of cooperation and teamwork. The 35 district executives and program consultants are co-employed, meaning that districts and District Services share both their costs and the responsibilities of their supervision. Annual objectives and performance evaluations are created in partnership between the district boards and the director for District Services. The District Services staff group is the only one of the 12 UUA staff groups that has this arrangement.

There are presently 19 co-employed district executives and 16 co-employed program consultants. The general rule

is that co-employed positions are full time. Their salaries and benefits totaled $2.8 million in 2009. Of that, the National Office contributed $1.6 million and the districts contributed $1.2 million – nearly a 50/50 sharing of costs.

Additionally, there are personnel employed and compensated solely by the districts. The number of full-time equivalents (FTEs) varies from district to district, ranges from 1 to 4.5 FTEs. Typical positions include an administrator, a youth and young adult coordinator, and a web site manager. By funding these additional 31 FTEs districts have almost doubled the available staff working in the districts. Districts also tap into the expertise of their lay and professional leadership to build consultancy teams that help do the work of the Association. (See Appendix C.)

Fundraising is another expression of how districts and the national office work together to fulfill the mission of Unitarian Universalism. Last year, just over $7 million was raised through the national Annual Program Fund to support the UUA. But an additional $2.9 million was raised through the *district* Fair Share donations and $637,000 through Chalice Lighters donations, which exclusively support congregations individually or in clusters. In sum, the staff and infrastructure of the districts help generate $10,493,546 toward the support of our faith.

Congregations

Districts naturally reflect the characteristics of their member congregations. The average number of congregations in a district is 54, but ranges from a low of 33 to a high of 76. These congregations can be spread over an area as small as eastern Massachusetts (Massachusetts Bay District) to as large as a five-state region stretching from Mexico to Canada (Mountain Desert District). Beyond numbers and geographic size, the character of the districts also varies widely. Ninety-three percent of congregations in the Massachusetts Bay District were incorporated before 1870 compared to 75 percent of congregations incorporated after 1955 in the Florida District. The percentage of lay-led congregations in a district can range from 4 percent to 46 percent, and the number of small congregations from 21 percent to 82 percent. Three Districts have nine emerging congregations and six districts have none. Some districts report growth rates around 5 percent while others are declining. In some instances, growth in a district reflects not new Unitarian Universalists but mostly UUs that have moved there from other districts.

Districts also face different challenges. In some, it is the struggle of congregations transitioning from a majority of secular humanists to a majority of religious humanists and theists. For others the challenge is stubborn individualism that isolates the congregations. Additional challenges include large seasonal influxes of tourists, rapidly changing community demographics, and the difficulty of attracting quality professional leadership to small congregations. It is clear that although the needs are similar in most districts, the degree and prioritization of those needs is different.

For more information about district and congregational characteristics refer to Appendix D, *A Letter on Small Congregations*, and Appendix E, *District Fundamentals and Metrics*.

Regionalization

Several times during the last century and a half, Unitarian and Universalist national bodies have attempted, unsuccessfully, to establish multi-district service centers throughout the continent. The attempts have failed, usually for lack of congregational buy-in and funding. However, the work of the Congregations Come First Team has helped inspire new regionalization efforts. Regionalization is well underway and has arisen when practicality has coincided with committed district staff. There are now five regional district staff groups. They formed organically, through the efforts of district staff who saw the practical advantages of collaborating. Once this development was underway, the national office provided critical resources to sustain these regional efforts.

District boards have voluntarily, but cautiously, embraced these regional groups to share resources, expertise, knowledge, and even some personnel to better serve the needs of congregations. The caution reflects congregations' and Districts' ever-present concern over service delivery becoming too centralized within the UUA. Thus far, these regional groups are not formalized within the UUA structure but, in some cases, group members are bound together by covenants of cooperation. All district staff members now associate with one of the five regional groups.

In general, geographically smaller regions share program consultants and offer joint conferences and programs. Where regions are geographically large, resources and knowledge are frequently shared but sharing consultants is more difficult and joint programs are more often web-based.

Some districts are exploring various inter-district and regional options for sharing administrative functions such as bookkeeping and website development. To date, there are dozens of efforts that tap into the energy and creativity that these regional collaborations are generating. See Appendix F, *District Partnerships and Integration*, for more information about the emerging regional groups and the innovative partnering underway.

THE DISTRICT SERVICES STAFF GROUP

With 35 co-employed positions, the director for district services, and his associate, the District Services staff group is the largest in the UUA and represents roughly 20 percent of all UUA staff. The District Services staff group is led by the director, who reports to the executive vice president and is a member of the Leadership Council. Only one of the current District Staff is headquartered in Boston; the rest are dispersed across the country. Some work out of a central office where staff, supplies, and equipment are located and others work from home-based offices where district resources are accessible primarily over the Internet.

Face-to-face contact among staff members, even for those working out

of a central office, is usually sporadic and limited to when they attend the same congregational events. Email, phone calls, and increasingly, video conferencing are the order of the day. The staff meet together as an entire group only twice a year, once in late November at what is affectionately referred to as the Big Complex Meeting (BCM) and again, briefly, during General Assembly (although that time together is in jeopardy as the Association responds to tightening fiscal circumstances). In spite of this geographic separation, district staff prize their collegial relationships with one another. This collegiality is fostered by the BCM, collaborative task forces, and a fruitful list-serve; is bound by the *District Staff Code of Ethics* (see Appendix G); and is sealed by a shared sense of ministering to our congregations.

The District Services Staff and Its Relationship with the National Staff

Whether staff members work out of the national office or are co-employed by a district, they all work for the UUA and are staff colleagues. District Services staff members depend on their colleagues in Boston and are very appreciative of the partnership that exists with the national staff. They rely on the administrative and technical support always present behind the scenes and look to the national staff for programs and specialized services that cannot be provided on a smaller scale. District staff members are sensitive to the national staff's challenges in crafting continent-wide responses to congregational need and they strive to support those responses through their work out in the districts.

Many aspects of UUA programming and services are implemented through the combined efforts of the national and district staffs. In efforts ranging from responsible stewardship to fruitful ministerial settlements, the district and national Staffs often collaborate as they meet the general needs of the congregations and the specific needs of individual congregations.

The geographic dispersion of district staff is sometimes a challenge for creating an integrated team. But the national and district staff groups work to include each other in decision-making and communications as appropriate. In addition, with the advent of new technologies, the district staff members are now able to participate in Boston-based weekly chapel, all-staff meetings, and special announcements. This technology also enables select members of the national staff to connect with district staff on monthly conference calls rather than only once a year during BCM. The district staff looks forward to better technologies and more opportunities to connect with colleagues in Boston and around the country.

The Theology of District Services

True to congregational roots, Unitarian Universalists hold fast to the primacy of an individual's encounters with the divine. UUs are both free to and called to make meaning of these encounters. And they are accountable for behavior consistent with the meaning they make. UUs also assert that a "community of autonomous churches" provides the best mechanism for individuals to explore the meaning, freedom, responsibility, and

accountability intrinsic to the UU faith journey.

Presently, the District Services staff group is a significant agent of contact between congregations and between congregations and the larger Association of congregations we call the UUA. In its boundary-spanning role, the district staff group works regularly with various groups across the structure of the Association so it becomes organizationally multilingual and can represent the needs of one group in the language and context of another. To congregations, it serves to help make the national office more real, and to the national office, it helps make the congregations more real. As such, it is a major embodiment of the "community of congregations" component of UU theology. The District Services staff model congregational programming that provides opportunities to explore the six community-building duties they owe one another: care, consultation, admonition, participation, recommendation, and relief (Cambridge Platform, see Sidebar 4).

Sidebar 4

The Cambridge Platform of 1648, the foundational document of the New England system of congregational polity, includes six major means by which congregations participate in the "communion" of independent churches:

1. Mutual Care – considering "one another's welfare;
2. Consultation – when a church has "occasion to require the judgment and counsel of other churches;"
3. Admonition – when any public offense be found in a church "which they do not discern or are slow in removing or healing;"
4. Participation – members of one church visiting another are admitted and ministerial services are loaned by one church to another to take the place of an absent or sick minister;
5. Recommendation – when a member of one church moves to the region of another church she/he is committed "to the fellowship of their covenant;"
6. Relief and Succor – support for "the necessities of poorer churches."

In this way, the District Services staff serves as a model for the true community of congregations. It is the ministry of this staff group to transform more than 1,000 individual congregations into that true community of autonomous congregations, a community that self-organizes to manifest and extend liberal religious values in the wider world.

The Work of District Services

District Services staff, or their designated adjunct consultants, work with a congregation only after being invited by either the president or minister and with the full knowledge of both. Before a consultation, the staff works with the congregation's leadership to clarify needs and define expected outcomes. Response strategies are customized to the congregation's size, history, personality, staffing structure, fiscal situation, and more. While consulting, district staff remains mindful of the complementary needs of ministers, religious educators, administrative staff, the UUA, and other UU organizations. In many cases covenants and good officers help

guide the interactions between the district staff and these groups.

Sidebar 5

The UUA Leadership Council has recently reworked the staff's purpose as follows:

The mission of both the national and district UUA staff members is to,

1. Support the health and vitality of UU congregations as they minister in their communities;
2. Open the doors of Unitarian Universalism to people who yearn for liberal religious community;
3. Be a respected voice for liberal religious values.

Though district staff work is tailored to the specific needs of individual congregations, overall, their efforts align with four major strategies for advancing congregational growth and vitality:

District Staff ensure transformational leadership training for congregations.

Congregations self-identify leadership development as their greatest need and, increasingly, District Services staff are identifying the complementary need for adult faith development and spiritual deepening. Effective congregational leadership has deep roots in the foundation of faith. District staff members are continuously seeking new ways of presenting trainings and developing new program models to meet these and other needs of our congregations and leaders. The results of these experiments are shared among all district staff. In November 2008, district staff identified the most pressing leadership training needs common across the country. This list provides some insight into the collective condition of our congregations. The needs -- often hidden in the question "Why aren't we growing?" -- are identified as**:**

1. Adult lay theological education and spiritual deepening
2. Quality worship
3. Stewardship and volunteering as spiritual practice
4. Healthy congregations and systems theory
5. Governance and its supporting infrastructure
6. Creating welcoming, multigenerational, multicultural communities

Last year district staff designed, delivered, or arranged for more than 300 training events, with the goal of having attendees become leaders within their own ranks. More information about training needs and innovative programs now underway to address them can be found in Appendix H, *The Achievements and Challenges of District Services at a Congregational Level,* and Appendix I, *Explorations and Innovations*.

District Staff leverage congregational transitions or turmoil to maximize positive structural change.

Transition and turmoil force change upon congregations. When this

happens, they look to district staff to help them leverage that change for the good. During the past year, staff provided consults for the exits, start-ups, and congregational integration of 100 full-time ministers, 68 part-time ministers, and 126 religious educators. Additional consults deal with budget short-falls, declining membership, building concerns, and conflict. Many congregational conflicts are avoided, mediated, or transformed into growth opportunities by district staff counsel.

District staff help facilitate the implementation and success of national staff programming.

District staff partner with the national staff to coordinate and encourage congregational participation in most UUA programming. Some examples include the Annual Program Fund, Association Sunday, building an appreciation and demand for ARAOMC training, the Diversity of Ministry initiative, the dissemination of Tapestry of Faith, the Consultation on Ministry To and With Youth, and the shifting of youth programming back into the congregations.

District staff build and foster relationships that harness the power of community.

District staff still value the call of the Cambridge Platform: that congregations and their lay leaders, ministers, and staff will rely on one another for care, consultation, admonition, participation, recommendation, and relief. Another main benefit of the recent regionalization efforts is that district staff have experienced, with one another, five of the six aspects of the Cambridge Platform. (They have not yet ventured into admonition of one another. . . .) The use of new and emerging technologies has made this regionalization easier. And this effort has allowed staff to assess and rehearse these technologies before introducing them to congregational clusters.

However, meaningful clustering at the congregational level remains a significant goal. Some districts have grouped congregations into healthy, functioning, sustainable clusters. Other districts still work to overcome the fierce individualism of congregations and clergy.

At the all-important personal level, district staff annually cultivates meaningful dialogue with many, if not most, ministers, religious education professionals, and congregational presidents. They also encourage community through greetings and condolences extended on behalf of the district. These are given, in person, to congregations dozens of times a year: for ordinations, installations, anniversaries, new buildings or additions, and occasions of loss and grief. Finally, staff provide some measure of support to the district-wide chapters and clusters of the UUMA and LREDA. For greater detail on the work of the District Services staff group, See Appendix J, *Key Roles of District Staff Members*, and Appendix K, *Tasks Commonly Performed by District Staff Members*.

THE FUTURE

Challenges (in no particular order)

District Services has identified the following challenges (see Appendix L, *Challenges at a National Level*, for the future and embraces them as opportunities to expand Unitarian Universalism.

Faith Incarnation - How can we incarnate our faith, encourage civic and religious leadership as a spiritual practice, and make a difference in the world?

Leadership Development – How can we provide, support, and encourage systems of lay leadership development rooted in a faith incarnate and centered on best practices and cutting-edge knowledge?

Boundary Spanning - How can the unique boundary spanning roles played by district staff best be leveraged in support of a more effective organization?

Youth and Young Adults - How can we best support our congregations in engaging youth and young adults in daily congregational life?

Ministerial Formation - How can we identify and create structures to support ministerial development?

Generosity - How can we create a culture of generosity?

Growth Strategies - How can we find and implement better strategies for growing our membership? Specific strategies targeted at national and district staff appear in Appendix M, *Plan for UU Congregation Growth*.

Anti-Racism, Anti-Oppression, and Multiculturalism – How can we help all levels of the Association develop an anti-Racist and anti-oppressive world view and develop our multicultural competencies?

Deepening Spirituality - How can we best support our members deepening their faith, their sense of UU Identity, and their connection to one another?

Collaboration - How can we continue to build and enhance relationships across congregational boundaries?

Technology Opportunities - How can we advance our use of technology to expand services, build networks, work across geographic distances, lower costs, and be good stewards of our environment?

A thorough examination of district differences and the resulting challenges is available in the *Report of the Congregations Come First Team January, 2008*. This report takes an "eagle's eye" view of the system as it focuses on questions of service delivery and funding. Also included in that report is a brief history of *The Development of District Services and Prior System Studies*. See Appendix N for the report.

Assessment

District staff recently created and distributed a survey designed for the purpose of soliciting direct feedback from ministers and congregational board members into the expectations and performance of the district and its staff. It will help inform future program planning and provide helpful feedback to those serving congregations. Results of the survey will be available to district staff by late summer. See Appendix O for a copy of the assessment.

Innovations

Congregational Connections – Since the 1961 consolidation the biggest innovation is the congregations' growing sense that they are in association with one another. Increasingly they understand the need to combine efforts to achieve larger aims. Turning away from isolation and toward cooperation with their neighbors and with the UUA, they are exploring what it means to be partners in ministering to the community and the world. As this interdependence strengthens, district staff encourage congregations to share their in-house expertise with each other, thus becoming another way to foster growth and vitality throughout the Association.

Collaborative Spirit - Another innovation is the strong and effective collaborative spirit that has arisen among district staff. This spirit reflects the influence of BCM, regionalization, and Harlan Limpert's vision-driven leadership. One example of this spirit is the willingness of district staff to form cross-district task forces, based on individual interests, to solve challenges common to all districts. For example, one task force generated the assessment tool mentioned in the previous section. Another is creating a common online virtual library to share and store electronic leadership development resources.

Customized Programming – Districts, individually and in collaboration with one another, are creating programs that address the emerging and sometimes unique needs of the congregations in their service areas. UUA resources, other UUA affiliates, and community connections contribute expertise and resources during the creation of these programs. Examples include the following:

- In September 2008 Mountain Desert launched **Living Into Covenant**, a ministerial formation project funded by the Panel on Theological Education.
- **No More Turning Away** (NMTA) is a collaborative effort in Central Midwest, initiated by the religious educators in a number of congregations, to simultaneously understand and work to end homelessness together.
- An ambitious inter-district effort between Pacific Central District and Pacific Southwest District helped to launch the **UU Legislative Ministry of California.**
- Mid-South's **Unlimited Potential Program (*UP!*)** is a unique enrichment program for very small congregations in Mid-South.
- Massachusetts Bay and Ballou Channing developed a program of basic leadership skills training called "**Leadership Arts and Crafts.**"
- Metro New York / Joseph Priestley / Ohio Meadville / St. Lawrence have joined to create the **UU Leadership Team Institute** (UULTI)**.** A week-long leadership experience for congregational teams focused on congregational development.

Technological Revolution – The final innovation is the use of technology. Cooperating with each other and with national staff, district staff members are now regularly hosting webinars and video conference calls and using Google Groups, Google Documents, Facebook, virtual libraries, and podcasts. One example best illustrates the benefits of the new technology. During 2008, 1,663 people attended 328 cyber-events, held over the Internet rather than at a physical meeting location. This saved hundreds of hours of travel, significantly reduced our carbon footprint, and made the events more widely available and more heavily attended.

Into the Future

A discussion of the future of District Services begins with the following observations garnered from reflections on its past.

Holy Conversation The conversation about the need for and purpose of districts and District Services is an ongoing holy conversation that explores our theology of congregational mutuality and accountability. It needs to continue at all levels.

More Emphasis on Creating New Congregations Before consolidation, one of the primary purposes of districting was to create new congregations and spread the faith. We need to explore the balance between serving the needs of congregations and establishing new ones.

Emerging Era of Shared Ministry Collective mutuality among clustered congregations rarely existed anytime in our Unitarian and Universalist past, nor did it exist in the past of most free religious organizations or denominations. However, associational relationships based on paternalism and congregational relationships based on individualism are now giving way to an emerging sense of shared ministry.

Reason to Be Hopeful From our vantage point situated between the congregations and the UUA as a whole, it appears that in spite of the challenges facing us, our Associational infrastructure has never been stronger. In addition, given the right circumstances and resources, positive structural change appears to happen organically. We need to recognize and build on our strengths and cultivate positive changes that occur from the bottom up.

Increasingly, district staff members feel their work to be that of collaborative ministry. They expect this feeling to grow as they work and share with congregational leaders, with one another, and with the national staff. Where do they hope this will all lead? During the BCM last November, district staff members collectively identified their three wishes for the future. This is where their hearts, minds, and energies are headed.

1. More and healthier congregations that lay claim to the saving message of Unitarian Universalism and proclaim that message to every culture and generation through thought, word, and deed.

2. The renewal and deepening of the covenant of mutual support between and among the congregations, districts, regions, and the national staff.

3. Better coordination throughout the UUA so that all congregations, no matter the district or the region, get equal and ready access to the resources that advance the best practices in spreading the faith of Unitarian Universalism.

Appendix A
UUA Bylaws and Rules Related to the Formation of Districts

UUA and Districts

The 19 Districts of the UUA are established by the UUA bylaws and operate as autonomous but connected regional bodies. In Article XIII of the UUA bylaws entitled Regional Organizations, the following four key points are made.

1) The Association shall support areas of regional responsibility known as Districts

2) The establishment of Districts and the manner of determining which congregations are included in each District shall be in accordance with rules adopted by the General Assembly (Rule XII)

3) Each District shall be autonomous and shall be controlled by its own member congregations to the extent consistent with the promotion of the welfare and interests of the Association as a whole and of its member congregations

4) Each District shall adopt bylaws that are not in conflict with the UUA bylaws.

Establishing Districts (Rule 12.2.1 of UUA Bylaws)

The following rules were adopted by the General Assembly.

1) Each district is specifically named .

2) Each District is composed of the congregations assigned to that District by the UUA Board of Trustees

3) The boundaries of each District shall encompass the areas served by its member congregations

4) A congregation may change its District membership upon the approval of the UUA Board of Trustee

Mission of the District

Each District has its own stated purpose or mission statement which is congruent with the UUA statement of purpose which states which affirms the following:
The UUA existing in order to

1) Serve the needs of the member congregations

2) Organize new congregations

3) Extend and Strengthen Unitarian Universalist institutions

4) Implement its principles

The UUA's purpose has recently been reworked for the staff by the UUA Leadership Council which states the following:

The mission of both the national and district UUA staff members is to

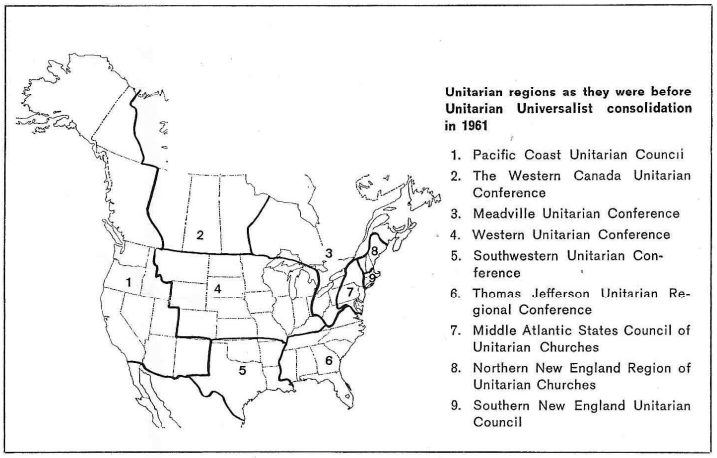
1) Support the health and vitality of UU congregations as they minister in their communities

2) Open the doors of Unitarian Universalism to people who yearn for liberal religious community

3) Be a respected voice for liberal religious values

In reviewing the mission statements of each District, in addition to the above, the Districts add a fourth affirmation – *connecting the congregations to each other and the UUA*.

Appendix B
Districting—'So I Can Understand It', by Mary H. Walling
From *The Unitarian Universalist Register-Leader,* February 1964



Unitarian regions as they were before Unitarian Universalist consolidation in 1961

1. Pacific Coast Unitarian Council
2. The Western Canada Unitarian Conference
3. Meadville Unitarian Conference
4. Western Unitarian Conference
5. Southwestern Unitarian Conference
6. Thomas Jefferson Unitarian Regional Conference
7. Middle Atlantic States Council of Unitarian Churches
8. Northern New England Region of Unitarian Churches
9. Southern New England Unitarian Council

Districting—'So I Can Understand It'

It's Not a Hodgepodge; Grass-Roots Movement Has a Basic Pattern

by Marie H. Walling

"The whole thing is just a mystery to me," complained the woman from Dayton, Ohio. "All I hear about is districts and regions and councils and conferences, and I don't know what you're talking about!"

Doubtless, a common and reasonable complaint. Since the districting of the Unitarian Universalist Association has been reported in dribs and drabs in the denomination's publications (the *Register-Leader, Challenge,* the Laymen's League *Lamplighter,* the Women's Federation *Bridge*), it isn't easy to understand the process of districting as a whole, either as it was planned or as it has developed.

"If you could just explain it to me *simply,*" pleaded our Dayton friend, "from the beginning."

Ever eager to be of service, the *Register-Leader* will try.

Organization

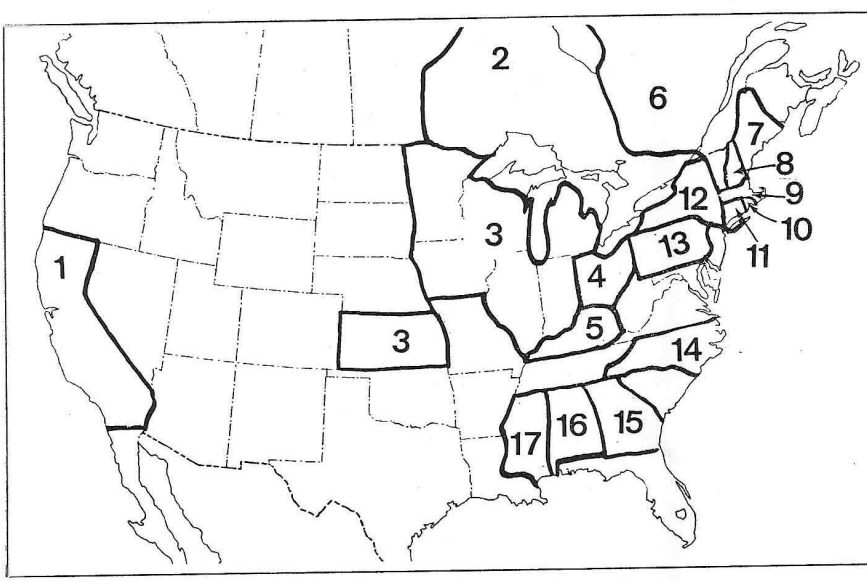
The two denominations which merged in 1961 to form the Unitarian Universalist Association were organized differently.

Prior to the merger, the American Unitarian Association was organized into *regions* which covered vast areas of the map and serviced large numbers of societies. Some were *councils,* some *conferences.* For example, in 1960, the Pacific Coast Unitarian Council comprised 42 Unitarian churches and 87 fellowships in Alaska, Canada, California, Utah, Arizona, Nevada, Oregon, Texas, Washington, and Idaho. It was staffed by a president, secretary, executive secretary, and office manager, with its headquarters in Berkeley, Calif. Like most of the other regions, Pacific Coast was subdivided into *area councils,* smaller groups of societies which met occasionally—usually yearly—for programs, but which had no paid staff and controlled no funds. Pacific Coast mother-henned four such area councils.

On the other hand, The Universalist Church of America generally was organized by states (and two provinces of Canada) into *conventions.* The Mid-west Universalist Convention was an exception, comprising seven states. In states where there were no Universalist societies, such as Arkansas, Montana, or Texas, there were no organized state conventions.

Financing

Unitarians and Universalists differed also in the method by which they paid their way. Churches in the Unitarian regions contributed directly, through the United Unitarian Appeal, to the denominational headquarters in Boston, which in turn fed funds back to support the regions, as needed. Churches in the Universalist state conventions contributed directly to their own conventions, as well as to the denominational headquarters in Boston. As a result, the Universalist national headquarters, in



Universalist state conventions as they were before Unitarian Universalist consolidation in 1961

1. California
2. Canada, Province of Ontario
3. Midwest Universalist Convention: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Wisconsin
4. Ohio
5. Kentucky
6. Vermont and Quebec
7. Maine
8. New Hampshire
9. Massachusetts
10. Rhode Island
11. Connecticut
12. New York
13. Pennsylvania
14. North Carolina
15. Georgia
16. Alabama
17. Mississippi

Districts of the Unitarian Universalist Association as they exist today. The dotted lines indicate proposed future districts.

1. Pacific Northwest District
2. Pacific Central District
3. Pacific Southwest District
4. Western Canada Unitarian Conference
5. Central Midwest District
6. Desert Conference
7. Southwestern District
8. St. Lawrence District
9. Ohio-Meadville District
10. Thomas Jefferson District
11. Mid-South District
12. Florida District
13. Northeast District
14. Joseph Priestley District
15. Metropolitan New York District

Sections a, b, and d, are one district, Midwestern Conference. Proposed future districts are:

a. Rocky Mountain (now Rocky Mountain Area Council)
b. North Star-Prairie
d. Michigan-Ohio Valley

New England inset map

A. New Hampshire Vermont District
B. Connecticut Valley District
C. Central Massachusetts District
D. Massachusetts Bay District
E. Ballou-Channing District
F. Metropolitan New York District which includes part of Conn., Manhattan and the boroughs, Long Island, and part of New Jersey.

a position to see the over-all continental picture, was unable to dispense funds according to the greatest need, and wealthy, endowed state conventions grew wealthier, while newer struggling conventions barely made ends meet.

The Districts

Wishing to retain the closeness of contact that the state conventions had, but to form units large enough to support financially professional staffs, specialized committees, and the budgets required to give meaningful service to member societies, the Interim Committee on Regional Organization recommended in 1961 that the new Unitarian Universalist Association be organized into *districts,* larger than the Universalist state conventions, but smaller than the Unitarian regions.

Seemingly a monumental project, "districting," as it came to be called, was expected to require years. Today, less than three years after the merger, districting is virtually complete.

Each district arises out of the wishes of its constituent members. A rough guideline has been that it should contain forty to seventy societies that are geographically contiguous. But rather than hard and fast boundaries, the emphasis has been upon centers of focus.

Once a group of societies determines what its rough outlines may be, borderline groups may decide to relate to either of two possible districts. For example, the Unitarian Universalist Association of Missoula, Mont., formerly affiliated with Midwestern Conference and 1,000 miles away from the conference headquarters in Chicago, elected to join the new Pacific Northwest District with headquarters only 300 miles away in Seattle. But Missoula will live in the best of both possible worlds by continuing to relate for program purposes to both districts, even though its primary source of service will be Pacific Northwest.

Some districts have been established because they are needed, despite the fact that they may not comprise the recommended forty to seventy societies. Desert Conference, for example, serves only ten societies, but has good growth potential.

Some of the old conferences and councils which were made up of small numbers of churches doubtless will wish to continue to meet, within the framework of the district, on a "grass roots" basis, though they will have no paid staff and no direct connection with UUA headquarters in Boston. For example, Gulf Coast Conference may continue to meet for mutual encouragement and the sharing of skills.

District Directors

Vital to the functioning of the district is the district director.

Ohio-Meadville, with more than sixty societies, is large enough to support a full-time district director, and the Rev. Russell L. Lincoln was to take office January 1.

However, Desert Conference, with ten societies at present, conducts its business through its four volunteer officers.

In some cases, one director is serving more than one district. The Rev. Clifton G. Hoffman is director for Thomas Jefferson District (47 societies), Mid-South District (27 societies), and Florida District (25 societies). To assist him in such a formidable undertaking is the Rev. Alfred W. Hobart of Birmingham, Ala.

District Committees

Most districts have their own specialized committees, each chaired by a member of the district board. For example, in Massachusetts Bay District, the community relations committee of the district has been active in attempting to achieve a reasonable accommodation by the Massachusetts Council of Churches, which moved to introduce into its constitution a clause stating theological belief. If the clause were adopted, Massachusetts Bay, now a member of the council, would be excluded.

In Connecticut Valley District, the adult programs department of the district mailed sixteen packets of information on the population explosion to churches and fellowships which had requested them, while the extension committee is helping to form several new fellowships in the district.

Most districts have such committees, plus the usual mundane ones like finance, bylaws, and budget.

District Financing

The UUA, which can see the over-all picture, supports the districts financially according to their needs with funds gained through the Annual Fund.

Some Universalist state conventions, which formerly controlled their own funds, have turned the entire amount over to the UUA; others have retained the invested endowment, but turn over the income from it to the UUA; still others retain both principal and income, and receive the balance needed from the Annual Fund.

Service Centers

One of the recommendations of the Interim Committee on Regional Organization was to establish seven regional service centers, staffed by professionals and financed by the UUA separately from the districts. The centers would provide for the societies in each geographical area such services as aid in recruiting ministers, advice and counsel in fund raising, development of conferences and camp sites, and general support of societies requesting aid.

However, the usual fly in the ointment quickly appeared—lack of funds to finance both the centers and the districts. Reluctantly the delegates to a conference in Syracuse in 1959 voted to give priority to the districts, and the service centers project was tabled.

Crossing Borders

The new districts are truly continental in flavor. Pacific Northwest includes not only Washington, Oregon, Idaho, and one fellowship in Montana, but crosses British Columbia, with its seven fellowships and two churches, to reach Alaska with four fellowships and one church.

Southwestern Conference draws in our fellowship in Mexico City and the Unitarian Society of Balboa, Canal Zone.

The First Unitarian Church of Honolulu and the Unitarian Fellowship of Kauai, Hawaii, though 2,300 miles away, are part of the Pacific Central District.

Northeast District is *really* northeast, extending from Maine to New Brunswick and Nova Scotia.

The spanking new St. Lawrence District, formed last November at a meeting of the boards of directors of the former New York State Convention of Universalists and the Mohawk Valley Council, combines upstate New York with parts of Canada.

And in far-away Puerto Rico, the Unitarian Fellowship of San Juan looks to—surprise!—Metropolitan New York District, feeling closer ties with that heavily Puerto Rican community than it does with, say, Florida District. The choice was entirely the fellowship's.

Like newlyweds who moved from *his* drafty, if elegant, mansion and *her* cozy, if cramped, cottage, into a moderate-sized bungalow, our merged organization feels that it is now adequately housed—through its districts—even allowing for the potential growth in the family that is expected.

I hope our friend in Dayton has gained new insight into the process of districting. (*I* have in preparing this story.)

Appendix C
District Staffing, 2009

District	Number of Congregations	Co-Employed Staff	Other Staff
Southwestern	**76**	Full-time District Executive; Full-time Director for Lifespan Faith Development (including leadership development)	4/5-time Administrator; 1/4-time Bookkeeper; other congregational consultants paid for on a fee-for-service basis
Northern New England	**72**	Full-time District Executive; Full-time Director of Lifespan RE 3/4-time Small Church and Sustainability Specialist	Full-time Administrator; Part-time office assistant
Central Midwest	**71**	Full-time District Executive; Full-time Director of Lifespan Faith Development and Growth	Full-time Administrator; Part-time Office Assistant; Part-time IT/Communication; Half-time Youth and Young Adult person; Contract person for RE administrative support
Joseph Priestley	**67**	Full-time District Executive; Full-time Director of Lifespan Faith Development	Full-time Administrator; Half-time Admin Ass't; Full-time Director for Growth and Extension; Director of Young Adult and Campus Ministry; Coordinator of Youth Activities; Quarter-time Development Director; Contract as needed with Coordinator for Electronic Communication and Adjunct Staff Coordinator
Clara Barton	**64**	Full-time District Executive; Full-time Program Consultant for Lifespan RE	Administrative Assistant; Bookkeeper
Thomas Jefferson	**62**	Full-time District Executive; Full-time Director of Faith Development, also responsible for congregational trainings, retreats, Start Ups, etc.	Full-time Administrative Assistant
Pacific Northwest	**60**	Full-time District Executive; Full-time Specialist for RE, Social Justice, and Lay Leader Development	Administrator; Bookkeeper; Webmaster; Small Congregation Consultants; Finance & Stewardship Consultants; Ministerial Transitions Consultants; Youth Programming Consultants
Prairie Star	**59**	Full-time District Executive; 3/4-time Program Director for Faith Development and	Full-time Administrator; Half-time (grant funded) Youth and Young Adult Specialist;

		Growth	8 hr/wk Web Coordinator 6 hr/wk Office Assistant
Mass Bay	**55**	Full-time District Executive; Full-time Director of Program Development for programs, grants, Chalice Lighters, Mystery Worshippers, RE staff Transitions	Full-time Administrator; 25 hr/wk Program Support Specialist; Half-time Youth, Young Adult & Campus Ministry Coordinator
Heartland	**53**	Full-time District Executive; Full-time Program Consultant	Administrator; 1/4-time Consultants for: LRE/Transitions; Leadership Development & Growth; Administrative Assistant; 1/8-time Youth Coordinator
Metro New York	**51**	Full-time District Executive; Full-time Program Consultant for Leadership Development	Full-time Administrator; Part-time Independent contractors for: Young Adult & Campus Ministry Consultant; Youth Ministry Consultant; Right Relations Consultant; Webmaster; Bookkeeper
Pacific Southwest	**50**	Full-time District Executive; Full-time Director of Lifespan Programs (including Social Justice, AR/AO/M, and running 6 camps a year)	36 hr/wk Administrator
Ballou Channing	**46**	Full-time District Executive	1/3-time RE Consultant; Half-time Administrator and Newsletter Editor; 1/5-time Youth Ministry Consultant; 1/5-time Program Associate
Mountain Desert	**45**	Full-time District Executive; Half-time Program Consultant for Lifespan Faith Development, Justice and Healing, and Small Congregations conferences	Full-time Administrator; Interim Youth Ministry Coordinator; Part-time New Congregation Consultant
Florida	**44**	Full-time District Executive; 1/4-time Program Consultant for DRE networking and support, faith development, and membership growth	Half-time Administrator; Healthy Congregations Team
Ohio Meadville	**44**	Full-time District Executive; Half-time Lifespan Faith Development Program Consultant	2/3-time Administrator; Part-time Bookkeeper; 1/4-timeYouth Ministries Consultant; 12 hr/month Young Adult & Campus Ministry Consultant
Pacific Central	**38**	Full-time District Executive; Full-time Director of Program Development	Administrator; Fee-for-service Healthy Congregations Team "Very part-time" administrator support to Coming of Age program;

			Stipend volunteer staff for Leadership School; Other stipend volunteers as needed for facilitation and retreats
St. Lawrence	**34**	3/4-time District Executive; Half-time Lifespan Program Consultant for RE, Youth, and Young Adult Ministry	28 hrs/wk Administrative Secretary; Stipend consultants for: Communications Coordinator; District Assembly; Fund Raising; Planning and Conflict; District Reporter; Social Justice; Young Adult & Campus Ministry; Youth Coordinator; Small Church Ministerial Transitions; Bookkeeper
Mid-South	**33**	Full-time District Executive; 14-time Program Consultant	Administrator; Chalice Lighter Administrator; Bookkeeper

Appendix D
A Letter on Small Congregations, by Karen Brammer and Mary Higgins

A Clear Message for Work with Small Congregations:
"You have important roles and responsibilities, and gifts to bring, to the UUA movement and the larger culture."

We notice something in the Northern New England District that is not, we think, unique to this district, and likely not new to our distinguished candidates for the office of UUA President. But we think it warrants repeating since we have discovered the dynamic below is critical in our work in the NNED.

Congregations have diverse experiences including powerful stories of success on one hand, and powerful stories of devaluation on the other (especially exemplified by the past practice of rustication in which ministers who failed or caused damage in larger congregations are sent to smaller congregations because they might cause 'less damage' there). This devaluation has resulted in a range of responses including distance from the larger UU movement, presenting as victimized communities, anti clericalism, and sometimes cultures of distrust and antagonism.

Of course there are examples of small congregations whose lack of vitality has more to do with personalities and "bad DNA," both of which must be dealt with in congregations of any size, not just small congregations. But it is clear here in the Northeast that small congregations have suffered less from bad DNA or personality issues than from being devalued

- While it has been important as staff that we acknowledge and respond appropriately where it is clear that congregations have been damaged or have not received adequate resources, the tack we take is not one of treating the congregations as if they need special attention, hand-holding, or hand-outs.

- Our work with them is vision-driven rather than reactive to a group that may or may not feel orphaned.

- Resource development is done where it becomes clear that current resources are not reflective of the reality of small congregations.

- We remind small congregations (and thank them) that they hold up the light of Unitarian Universalism in the many, many small communities in which they dwell, sometimes at risk given they work in an area that is at times more conservative or reactive to liberal thinking.

Thank you for your consideration of this issue and for the dedication and energy required to provide the quality leadership you have already brought to our UU movement.

On behalf of the NNED staff,
Rev. Karen Brammer Small Church Specialist and Sustainability Coordinator
kbrammer@uua.org

Appendix E: District Metrics Spreadsheet

Appendix F
Partnerships and Integrations

Over the past four years, the districts have voluntarily formed regional clusters to facilitate the sharing of resources, expertise, knowledge and even some personnel to increase district effectiveness.

1) North Atlantic Region (Mass Bay, Clara Barton, Ballou Channing, and Northern New England)
2) New Regional Group –NRG (Joseph Priestley, Metro New York, Ohio Meadville, and St Lawrence)
3) Mid- America (Central Midwest, Prairie Star, Heartland)
4) Southland (Southwest, Thomas Jefferson, Florida, and Mid-South)
5) Wild, Wild West (Pacific Northwest, Pacific Southwest, Pacific Central and Mountain Desert

In general, where districts are geographically smaller, sharing of program consultants and the offering of joint conferences and programs is more common and has been developing organically. Where distances are large, resources and knowledge are frequently shared but sharing consultants is more difficult and joint programs web based. Some districts are exploring various inter-district and regional options for sharing select administrative functions: bookkeeping, website development, and some other administrative functions.

Here are a few examples of current partnership and cooperative efforts:

Southland (Southwest, Thomas Jefferson, Florida, and Mid-South)

- Program Consultant Connie Goodbread is being shared by Mid-South and Florida.
- Mid-South and Florida are offering two different leadership development weeks - one at the Mountain and one in Dallas.
- Mid-South, Thomas Jefferson, and Florida take turns doing all inclusive OWL trainings in Atlanta and support each others Renaissance Modules.
- Thomas Jefferson hosts Goldmine youth training and the other Southland districts support and participate in it.
- Southland districts have an agreement that their staff will help each other when asked. They are discussing joint consultant training and programs for lay theological training and working to develop a path for deepening faith for lay leaders.

New Regional Group –NRG (Joseph Priestley, Metro New York, Ohio Meadville, and St Lawrence)

- NRG is currently planning the third annual offering of its four district leadership school (UULTI – UU Leadership Team Institute).

- NRG offered a webinar-based Large Church Conference in March 2009 that saw 19 congregations across the region and the nation participate.
- Starting last year, NRG district staff attends each others' District Assemblies on a rotating basis and are leading workshops at those events.
- NRG shares a new full-time Growth Consultant, Mark Bernstein. 75% of Mark's time is spent with Joseph Priestly. He divides the other 25% of this time between Metro NY, Ohio-Meadville and St. Lawrence.
- The full time Director for Youth and Young Adult Programs in Joseph Priestly coordinates communications and facilitates the sharing of events information and best practices between Youth Staff and the Young Adult and Campus Ministry staff of the four NRG districts.
- The NRG youth and young adult staff have exploring the options of offering both youth and young adult leadership development training and working together to develop some curriculum/resources.

Wild, Wild West (Pacific Northwest, Pacific Southwest, Pacific Central and Mountain Desert

- The districts of the west are geographically immense. Consequently, they tend to share expertise and knowledge using the Internet, email and other digital technologies.
- Pacific Northwest and Mountain Desert are sharing an annual "RE Leadership School", alternating the location between the two districts each year.
- District staff will travel to stand in for one another during sabbaticals and illness or other such circumstances.
- The Mountain Desert and Pacific Northwest boards will meet together at GA this year to discuss governance collaborations & best practices.

Mid- America (Central Midwest, Prairie Star, Heartland)

- The region hosted a shared training for conflict consultants from all three districts last fall.
- They offer monthly online workshops on a variety of topics for people in all three districts. Some were led by District Staff; some led by other experienced leaders.
- Beginning in 2010, district staff members will attend each others' District Annual Conferences and lead workshops at those events.

North Atlantic Region (Mass Bay, Clara Barton, Ballou Channing, and Northern New England)

- After five years of discussion and planning, the Northern New England District was formed in July 2008 from a consolidation of the old Northeast District (Maine) and the New Hampshire Vermont Districts. The plan included a timeline for hiring joint staff, starting with the DE and ½ Small Church Specialist and then adding a Program Consultant.

- North Atlantic has a four district mutual support agreement that spells out our support of each other in times of natural or human made disasters or traumas.
- The districts publicize each others' events and because they are close geographically, staff and congregational members frequently attend populate each others' workshops and seminars.
- North Atlantic hosts a regional conference every other year and brings together approximately 300 people for a day of UU growth and Learning.
- The Program Consultants meet regularly and host joint Renaissance, OWL and other trainings.
- We are now jointly involved in the development and programming for a regional leadership school, NELS.

While many resources and some consultant personnel can be shared by districts or among regions, there appears to be a limit to regionalization efforts. Some districts have formed a very strong sense of district identity and history that congregations do not want to see changed or damaged in regionalization efforts. Congregational leaders expect to be able to form close working relationships with district staff, especially the District Executive. Congregational leaders expect that district staff will know the history and understand the culture of each congregation to facilitate a sense of trust and intimacy and encourage cooperative efforts. It has been expressed by different leaders in different districts that that if districts didn't exist, the congregations would miss having someone or some mechanism that could serve as a bridge between the local congregation and the larger UUA. District staff members often facilitate connections, networking, a sense of intimacy, and trust between the national organization and the local congregation.

Appendix G
District Staff Code of Ethics

CODE OF PROFESSIONAL ETHICS FOR MEMBERS OF THE UUA DISTRICT STAFF

Throughout the years since the merger of the Unitarians and the Universalists, we have wrestled with the creative tension inherent in the terms of our identity as religious liberals. Our "binding together' and our "free searching" provide roots and wings: the roots of community and shared values, and the wings of the free mind and spirit. The strength of the 1985 Principles and Purposes statement is that it honors the many sources of our "living tradition" and unequivocally lifts up our common affirmations. Our covenant -- within the District Staff of the UUA, within the District Services staff group, within each district of our Association, and within and between each of our congregations -- is the practice by which we embody the interdependent reality we affirm at every level of our existence. Our greatest challenge is to practice respect for the inherent worth and dignity of every person in harmony with our commitments to responsibility, justice, equity and compassion in all human relations. Our message and practice need to be congruent.

UUA district staff in the 20 districts of the Unitarian Universalist Association are bound by the Codes of Professional Practices of the UUMA, if they are ministers, and of LREDA, if they are religious educators. There is currently no published set of guidelines governing the behavior of lay members of the District Staff.

Therefore, by this document, all members of the UUA District Staff agree to abide by the Code of Professional Practice contained in the UUMA and LREDA Guidelines, as modified herein. We affirm the following as our standard of commitment to the practice of our profession, with respect to our personal conduct and to all interactions with each other, with ordained clergy and with the members of our UUA congregations.

1.
SELF

Because the religious life is a growing life, I will respect and protect my own needs for spiritual growth, ethical integrity, and continuing education in order to deepen and strengthen myself and my profession.

I commit myself to honest work, believing that the honor of my profession begins with the honest use of my own mind and skills.

I will sustain a respect for the ministry. Because my private life is woven into my profession, I will refrain from private as well as public words or actions degrading to the ministry or destructive of congregational life.

As a sexual being, I will recognize the power that this profession gives me and refrain from practices which are harmful to others and which endanger my integrity or my professional

effectiveness. Such practices include sexual activity with any child or with an unwilling adult, with a counselee, with the spouse or partner of a minister or person in a congregation in our District, with interns, with students for the ministry, with other district staff in my District, and in any other such exploitative relationship.

Because the demands of others upon me will be many and unceasing, I will try to keep especially aware of the rights and needs of my family and my relation to them as spouse, parent and friend.

2. COLLEAGUES

I will stand in a supportive relation to my colleagues and keep for them an open mind and heart.

I will strictly respect confidences given me by colleagues and expect them to keep mine.

In the interest of maintaining positive and professional relationships with UUMA and LREDA members serving congregations within my district, and to avoid being triangulated in an unhealthy way, I will refrain from having substantive contact with members of a congregation without notifying the minister or religious professional. Exceptions to this practice require consultation with the Director of District Services.

I will not speak scornfully or in derogation of any colleague in public. In any private conversation critical of a colleague, I will speak responsibly and temperately. It is inappropriate to make comments about UUMA or LREDA members in reports that will be made public without informing them of the contents of the reports in advance and giving them a chance, if necessary, to seek the advice of someone associated with the appropriate Good Offices program. UUA staff who must sometimes be critical of the behavior of UUMA or LREDA members can do their job of consulting with and advising ministers and congregations without "speaking scornfully or in derogation of a colleague in public" and when engaging in private conversations they can do so "responsibly and temperately." I believe that even when being critical it is possible "to speak the truth in love."

Should I know that a colleague is engaging in practices that are damaging, as defined in the UUMA or LREDA ~ Code of Professional Practice, I will speak openly and frankly to her/him and endeavor to be of help. If necessary, I will bring such matters to the attention of the appropriate bodies. There are situations in which UUA staff must speak in confidence when talking about colleagues with other members of the UUA staff or with the members of bodies with whom they are working, such as the Ministerial Fellowship Committee. This is different from speaking derogatorily in public.

If, in the course of consulting with a congregation, I find that there is evidence of "conduct unbecoming" on the part of a UUMA member or a member of LREDA, I will not first discuss such matters in a public report. Instead, I will first inform both the minister or religious educator involved and the Ministry and Professional Leadership staff group. Depending upon the severity of the reported misconduct, I will bring others into the situation as seems appropriate at that time.

Should the conduct continue, I will inform the appropriate congregational leaders of his or her church of the evidence, outlining to them the possible actions that could be taken, such as filing a complaint with the Ministerial Fellowship Committee, the UUMA or LREDA and then allowing the church leadership to decide if this is what they want to do.

As a member of the UUA staff I will be aware of the role and responsibility of the UUMA and LREDA Good Offices Person(s) in my area, and will consult with her/him/them as appropriate. I am willing and able to advise UUMA members, LREDA members as well as congregations and other organizations where to turn for help when in trouble.

The nurture of the relationship between a congregation and its called minister and/or religious educator is of utmost importance to the strength of the movement and to the integrity of our ministry. The same is true of the relationship of members of the District Staff with congregations and ministers in their Districts. For this reason, consultation among colleagues practicing the diverse forms of our ministry within the same geographic area is essential to promote healthy congregational life. I will defer accepting any invitation for my services associated with the work of the UUA District Staff from persons in a District where I have served as a member of the District Staff until I have consulted the current District Staff person. If I remain a resident in the District last served, I will refrain from any involvement in the life of that District for a period of two years subsequent to my departure. After that, I will consult with my successor before taking on any assignment for the District. If I am duly settled in a congregation or community-based ministry as a parish minister, minister of religious education or director of religious education, I shall offer only such services as are appropriate to my present ministry, consulting with my colleagues and the local District Staff person about any roles or services I perform which may have an impact on their area of responsibility. The purpose of such consultation is to reach mutually acceptable understandings about the appropriate roles that former District Staff persons in the same geographic area should play. Irreconcilable disputes should be referred to the Director of the District Services staff group for mediation.

I will defer accepting any requests for professional services associated with the work of the UUA District Staff from members of any District until I have consulted with the incumbent District Staff person. In order to maintain my colleague's free choice in this matter, I will inform the person requesting my services of the necessity to consult our professional guidelines regarding the activities of former District Staff. If my colleague requests that I refrain from performing the service, I will refuse the invitation,
and indicate that our Code of Professional Practice forbids me from performing the service. Should emergency circumstances make such a consultation impossible, I shall render only limited services and consult with my colleague at the earliest possible opportunity.

I will inform my colleague in advance of any public engagement I may accept in his or her District, which might bear upon local issues or policies. If approached by a member of any colleague's District for advice on matters affecting my colleague's work, I will consider carefully the circumstances of the request. If the advice sought indicates a possible violation of the Code of Professional Practice, I will listen carefully and explore appropriate ways of addressing the issue within the context of our Code and the UUMA and/or LREDA Guidelines. If the advice requested

is not of this nature, I will inform the person of my professional obligations under this Code, and carefully consider whether it is appropriate for me to respond in any way. When in doubt, I will err on the side of deference to the prerogatives of my colleague's call.

If I am to share the work of a District with another professional or professionals, I will earnestly seek clear delineation of responsibility, accountability and channels of communication before responsibilities are assumed. I will, thereafter, work in cooperation and consultation with them, taking care that changing roles and relations are re-negotiated with clarity, respect and honesty.

If I am a member of a colleague's congregation, I will in all ways honor the priority of his or her call to the ministry or religious education work of that congregation, and I will carefully shun inappropriate influence which other members may yield to me. I will be generous toward a colleague who is a member of my congregation.

I will share and support the concerns of the Unitarian Universalist Ministers Association and of the Liberal Religious Educators Association, especially as reflected in their respective Guidelines.

3. CONGREGATION

I will uphold the practices of congregational polity including both those of local self-government and those of counsel and cooperation within our Association. Throughout my work in the District, I will teach the history, meaning and methods of congregational polity, recognizing informed and faithful adherence to these practices as the bond preserving and reforming our free corporate religious life.

I will respect the traditions of the District and the UUA, enriching and improving these in consultation with the members.

I will hold to a single standard of respect and help for all members of the District community of whatever age or position.

I will deal respectfully with lay leaders and members of congregations in my district. I will not speak derogatorily of them in public, and I will be judicious in reports concerning their behavior and will speak to them first if my public report criticizes them.

I will respect absolutely the confidentiality of private communications of members.

I will remember that congregational leaders, religious educators and ministers place special trust in their District leadership and that the members of the District allow the District Staff professional to become a part of their lives on the basis of that trust. I will not abuse or exploit that trust for my own gratification.

I will not invade the private and intimate bonds of other's lives, nor will I trespass on those bonds for my own advantage or need. In any relationship of intimate confidentiality, I will not exploit the needs of another person for my own.

I will not engage in sexual activities with a member of the District who is not my spouse or partner, if I am married or in a committed relationship. If I am single, before becoming sexually involved with a person in the District, I will take special care to examine my commitment, motives, intentionally and the nature of such activity and its consequences for myself, the other person, his or her congregation and the District.

I will exercise a responsible freedom of the pulpit with respect for all persons, including those who may disagree with me.

I will encourage by my example an inclusive, loyal, generous, and critical spiritual leadership.

I will take responsibility for encouraging clear delineation of responsibility, accountability and channels of communication with ministers and other church staff members in the District.

I will take responsibility for encouraging adequate and sensible standards of financial and other support for ministers, religious educators and other staff within the District.

I will inform the Board of the District immediately when I have accepted a call to another position.

4. MOVEMENT AND ASSOCIATION

I will encourage the growth of our congregations and the spread of the ideals of the Unitarian Universalist tradition and fellowship.

I will participate and encourage lay participation in the meetings and activities of our Association.

I will encourage financial support of the Unitarian Universalist Association, the District and associated programs.

I will inform myself of the established candidating procedures of the Unitarian Universalist Association, and I will strictly observe them. I acknowledge that it is inappropriate for any member of the UUA staff to publicly support any candidate for office within the UUA.

5. COMMUNITY

In word and deed, I will live and speak in ways representing the best Unitarian Universalist tradition and leadership in the larger community.

I will maintain a prophetic pulpit, offering to the community religious and ethical leadership.

I will encourage members' participation in efforts to resolve community problems.

I will offer sympathetic support to ministers of other religious bodies serving within the District.

Adopted: June 24, 2003
Modified: December 2006

Accepted by (print):

Signature:

Title:

Date:

Appendix H
Achievements and Challenges at a Congregational Level

We asked the District Staff, "What do your congregations need?" These are the needs identified. This is the daily work we do with our congregations. These needs arise in conversation with congregational leaders and professional staff, from work done with the congregations on transitions (start-ups and exit interviews) and in conflict management. Our aim is to meet the needs of congregations by being pro-active in offering educational programs, linking our congregations together to share resources, and reaching out to lay and professional leadership as they begin their work in congregations.

1. Leadership

Developing leadership training that is focused on congregational life is a regional initiative. Districts collaborate as regions to create more effective leadership training that encourages teams, youth and young adults and is targeted at the emerging leaders in congregations.

Congregational Presidents gather for orientation, to share ideas, best practices and to become familiar with District Staff and comfortable enough to reach out to District Staff for advice and support. Web conferences and electronic communication keep the congregations connected.

District Leadership Conferences are planned around content tracks i.e. growth, stewardship, membership development. Congregational and District leaders are encouraged to attend UU University.

2. Faith development - Including quality worship and adult lay theological education.

The Program Consultants' roles are: evolving. They serve as directors of faith development, leadership development, and as growth consultants, providing opportunities for training, consulting, resource development, connecting congregations to existing UUA programs.

Increasingly, training is multi generational and multi tracked, inviting teams from a district's congregations to come together for an event. Districts are using web resources to conduct on line workshops and to record events and post them on websites.

Regional Groups invite UUA staff to conduct workshops on the new faith development materials. Both RE Weeks at The Mountain and at Star Island will have workshops on the new Tapestry of Faith Programs.

3. Resource Development - conflict engagement, systems theory, how to…

With increased regular contact with congregations, district staff identifies training needs of leadership and other volunteers in local congregations. The enormous talent of the district staff is shared in a virtual library and on listserves .

District Staff may attend trainings i.e. Policy Governance, Interim minister and DRE Training. They design programs for clusters of congregations. They work with district committees to bring national trainings like OWL, Renaissance Units, AR/AO work, to districts and regions, and they promote UUA and affiliate group conferences.

Each district works to identify and develop a team of consultants to work with individual congregations. District Staff may work with congregations to help them identify the type of consulting they need.

4. Stewardship - as spiritual discipline

In challenging economic times like this, the District Staff has been called on to help congregations make hard financial decisions and identify resources for their members. The District Staff has shared the resources created by their local congregations, researched resources available, and discussed the economic impact of the current economy on regions and via regular conference call staff meetings.

This has helped District Staff to respond more effectively and theologically to the challenges our congregations face this year. The District Staff, as the local connection to the UUA, is seen as standing with our congregations in their decision-making.

Questions about budgeting, buildings, staffing, layoffs vs. furlough, are being discussed.

5. Purpose of the church - mission/vision - connections to other UUs.

District Staff model healthy leadership, right relationship and UU spirituality for congregational leaders. They encourage congregations to participate in a mission/vision/covenant process by offering consultations, district and regional workshops, and on line workshops

.

6. Ministerial/staff transitions

Start-Ups are a regular function of District Staff. Full-time Ministers and Religious Education Professionals are encouraged to plan a Start-Up Workshop. District Executives are the primary contact for any part-time ministry in their district.

District Staff work in covenant with Good Officers on transitions. Exit interviews, start-ups for interims, consultations and workshops with search committees, all are resources available to congregations to increase their ability to find and retain good professional leadership.

7. Staffing and infrastructure - including communication skills.

Consulting with staff teams has emerged as a role for District Staff. As our congregations acquire more staff, both part-time and full-time, the need for effective planning skills, supervisory skills and communication skills is emerging. Accountability and effective staff evaluation processes and tools are emerging as necessary functions

requiring development. District Staff is called upon to provide training, identify resources and work with conflict.

Our wishes for the future

- More and healthier congregations that lay claim to the saving message of Unitarian Universalism and proclaim that message to every culture and generation through thought, word and deed.
- The renewal and deepening of the covenant of mutual support between and among the congregations, districts, regions, and the national staff.
- Better coordination throughout the UUA so that all congregations, no matter the district or the region, get equal and ready access to the resources that advance the best practices in spreading the faith of Unitarian Universalism

Appendix I
Explorations and Innovations

Leadership development and ministry to lay and ordained congregational leaders are key functions of district staff. District staff members are continuously seeking new ways of presenting trainings and developing new program models to meet the ever-changing needs of our congregations and leaders. The results of these experiments are shared among all district staff.

Building regional community is another key function, one that can be assisted by the use of various new technologies. In the past couple of years, a number of recent innovations in district services delivery have grown from more effective and widespread use of newer technologies.

New program models and increased networking increase the capacity of district staff to develop leadership and build regional community.

TECHNOLOGICALLY BASED INNOVATIONS

The Central Midwest district is in the midst of its "virtual district" project. They set a goal of making their district assemblies "digitally accessible": with podcasts and resources from as many of the presentations and workshops as possible. They set the goal of doing this within a budget of human and financial resources that would be affordable to the average congregation allowing this to be a joint learning endeavor. Other districts are already following suit.

A growing number of districts are involved in recording keynote addresses, workshops and lectures and making them available on their websites as podcasts. Central Midwest District staff is working to create a resource bank of podcast recordings of workshops and programs for use by the staff of all districts. Their efforts include the loan of professional grade MP3 recording equipment and editing expertise to other districts so they can create podcasts of select workshops.

Many districts are now regularly using on-line training events for church leaders, members of congregations and district committees. Common training events include board training, policy governance training, hospitality and "secret visitor" training. The NRG region offered an online Large Church Conference in March 2008 with 19 participating congregations from across the region and nation. The MADS region will offer a series of nine webinar events next year, each of which will be repeated twice. MADS will also record an place online these events. Thomas Jefferson **is** offering monthly 90-minute web seminars on topics including Appreciative Inquiry, Building Multi-racial, Multi-cultural congregations, Models of Governance, Faith Development, and more. As staff becomes more familiar with the software, there will undoubtedly be more offerings online.

The Prairie Star District Lifespan Program Director, the Rev. Phillip Lund, has been writing a blog on topics related to faith development, family ministry, youth programming, and more. Find Phil's Little Blog on the Prairie at http://home.earthlink.net/~psdlund/ Other staff have been inspired to start blogs, too.

Many districts now use on-line surveys for timely evaluation of training events and conferences. By using the web-based Survey Monkey tool, they create evaluations that can be easily analyzed to provide usable input for future events.

A number of districts have also moved to e-mail based newsletters to all members of the District and congregational packets to leaders to keep them apprised of what's going on in a more timely fashion, while reducing production costs of mailed newsletters and saving a few more trees.

Districts in the MADS region now use Stonetree software for connecting congregations to supply preachers and musicians. This was first developed by volunteers in the Prairie Star District and is now adapted to use throughout the region.

This fall Mid-South (Dispatches) and Ohio-Meadville (News Releases) began offering monthly short dispatches/news releases for publication in congregational newsletters. The hope is that these short "news releases" will better connect the 'people in the pews' with the district, the Association, and neighboring congregations.

As districts in the MADS region move to more cooperative efforts, they realized that regionally focused cooperative leadership development work is becoming, in marketing terms, a brand. They plan to promote this by moving materials produced by this work to a new website, www.MidWestUULeadership.org.

INNOVATIONS IN PROGRAM DEVELOPMENT

In September 2008 Mountain Desert launched **Living Into Covenant**, a Ministerial Formation Project funded by the Panel of Theological Education. Based on the educational philosophies of Maria Harris, Parker Palmer and Peter Groome, this experiential model involves students, ministerial interns, ministers in preliminary fellowship, experienced ministers, religious educators, and lay leaders in deep dialogue about the leadership of our congregations and larger movement.

No More Turning Away (NMTA) is a collaborative effort in Central Midwest, initiated by the religious educators in a number of congregations, to simultaneously understand and work to end homelessness together. They created a website that is a resource depot for program content and information sharing to assist NMTA congregations and allow them to all work in harmony. When UU religious educators in the Chicago area pondered the idea of having a multiple UU church social action activity, they considered the difficulty of trying to find a common agreeable date and the logistics of getting everybody to one place. They decided to come up with up with something different – a social action/social justice project focused on homelessness was chosen that met the following criteria:

- **Churches can work in parallel-**It needed to be a project that churches can participate in parallel (at the same time but in their own community),
- **Meaningful-**It needs to be meaningful,
- **Multi-generational-**The project should be intentionally multi-generational, with adults and youth working and learning together
- **Turnkey Implementation-**Event scheduling, resources and directions on how to participate in this project must be provided and easily available.
- **Flexible-**There must be flexibility built into the program because each church has its own needs, capabilities and time availability.
- **Publicity Potential-T**he project must have publicity potential, so that Unitarian Universalist churches can be known for leading, rather than an also participated.

As the Chicago religious educator group shared this project idea with other religious educators in the district, it turned into a district wide project.

A five-year-old inter-District effort between Pacific Central District and Pacific Southwest District has created the **UU Legislative Ministry of California**. This committed and organized group has carved out a statewide social justice ministry, bringing UU values into the Sacramento debate, shaping both public opinion and public policy, bringing the UU voice to the political arena.

In light of the new vision growing for ministry to and with youth, the Ohio Meadville District is facilitating a series of **Youth Ministry Cluster Experiences For Youth and All Who Care About Youth. These are a series** of daylong conversations with youth ministry stakeholders in each of the district's congregational clusters. Three have already been held this year and more are scheduled. The conversations include planning for resource sharing, how congregations can join together to mutually strengthen their youth programs and what the OMD can do to support those efforts.

In 2007, Northern New England (formerly New Hampshire/Vermont and Northeast Districts) sponsored a year of work with Partners for Sacred Places and eight congregations who own historic buildings. The cost of maintaining our historic structures sometimes dwarfs the congregation's ability to fulfill its ministry. The program goals we have established are to reverse this drain; energize the people in UU churches about the new partnerships that can develop with their localities maintaining their buildings: There is an evaluation of the physical structures; an assessment done of the community outreach being done and calculating the dollar value of that outreach; Identifying the ways the congregation's building is a larger community resource and linking them to funding sources outside the church membership to help them maintain their buildings.

Mid-South **Unlimited Potential' Program -- UP! - is** a unique enrichment program for very small congregations in Mid-South (adult membership under 70, no full-time staff). 18 congregations are participating for 18 months, from spring 2008 through 2009. Participating

congregations receive:

5) resources tailored for UP!-size congregations focused tracks at district conferences
6) an electronic newsletter (*WHAT'S UP!*)
7) periodic conference calls and a list-serve (Google group) for sharing information and ideas
8) unique gatherings just for the **"UP!"** congregations.
9) Program costs are underwritten by Association Sunday funds

Metro New York / Joseph Priestley / Ohio Meadville / St. Lawrence have joined to create the **UU Leadership Team Institute - UULTI.** During this week-long experience, participants explore Unitarian Universalism on spiritual, intellectual, personal and practical levels. They will acquire skills to build and strengthen their congregation and community. Areas covered vary each year and have included Congregation Development and Growth, Faith Development, Family Ministries, Governance, Justice-making, Small Group Ministry, Healthy Congregations, Lifespan Faith Development, Multi-culturalism, Shared Leadership, and UU Values and History.

The Ballou Channing District has engaged a consultant to study the feasibility of starting a new congregation using the cell church/home church model. This spring research is being conducted on location and demographics. Assuming the results show good potential, work will begin in the summer to organize one or more small groups that will be the foundation of the new congregation. Other districts are planning to use the findings of this work in starting their own home church programs.

Mountain Desert District is engaged in an Appreciative Inquiry process to re-imagine District Youth Ministry. The core team developed an affirmative statement to guide the Discovery, Dream and Design aspects of the process: *Youth in MDD are invited to a living Quuest to encourage spiritual adventure, holy curiosity, and meaning making.* This Quuest will empower youth to articulate beliefs; develop spiritual discipline; engage in social justice rooted firmly in faith, love and trust; and foster personal and religious resilience. Their Design phase involves youth from across the district in five online design teams: Worship, Social Justice, Multi-generational congregations, Resilience and How we gather.

Massachusetts Bay and Ballou Channing Districts developed a program called "**Leadership Arts and Crafts**" as a series of evening sessions on such topics as "Brushing off the Welcome Mat", "Listening to Your Congregation", "New Models of Religious Education", "Effective Social Justice Organizing", "Best Business Practices" and more. The programs will be offered in four regions of the two districts on a rotating basis.

Appendix J
Key Roles of District Staff Members

Mission of both national and district UUA staff members
(These three UUA staff mission statements were developed by the UUA's Leadership Council.)

- Support the health and vitality of UUU Unitarian Universalist congregations as they minister in their communities.
- Open the doors of Unitarian Universalism to people who yearn for liberal religious community.
- Be a respected voice for liberal religious values.

Specific roles of District Staff Members

1. Serve as the "First Call for Help" to congregations. Coordinate UUA services in support of congregational life.

1. Help people understand the value of congregations being in relationship with one another, the district, the larger Association, and with interfaith groups – all for common goals and purposes
2. Represent the Association of Congregations, including the district, at key national, district, and congregational events
3. Create "clusters" of congregations for the purpose of advancing our shared values

2. Help congregations manage change and assist congregations in time of conflict or trauma

1) Ministerial transitions
2) RE Professional transitions
3) Staff transitions
4) Building purchase, building, or renovation
5) Conflicts between staff and lay leaders
6) Trauma caused by illness, injury, death, or sexual misconduct

3. Serve as a conduit of resources from the UUA to congregations and among and between congregations

- Know the UUA and its website well and be able to refer ministers and lay people to portions that can meet their needs
- Be knowledgeable about resources (classes, conferences, websites, books) provided by the Alban Institute and other church consulting organizations
- Maintain strong productive relationships with congregational and district leaders

4. Identify, recruit, train, and support lay leaders to provide services to congregations

6) Develop training teams and consulting teams in the areas of lifespan faith development, growth, conflict, stewardship, leadership, ministerial and professional leadership transitions, etc.

5. Provide training in Transformational Leadership

7) Strengthen existing congregations and help create new congregations
8) Ensure high quality lay leadership development opportunities are offered at district assemblies and at other times and places
9) Model transformational leadership in district work and events
10) Provide training in all areas of church health and vitality

6. Provide support to professional religious leaders

4) Provide support for clergy, religious educators, and professional staff
5) Provide for the placement of part-time ministers where needed

7. Manage the administration of the district office

10) Supervise staff
11) Manage budgets
12) Ensure excellent communication channels

8. Constantly seek feedback from others on how to be more effective

13) Use feedback from others, including district board and UUA supervisor, with which to continually improve effectiveness.

Appendix K
Tasks Commonly Performed by District Staff Members

Maintain significant contact with every congregation in the district at least once every two years
Have one-on-one conversations with settled ministers and religious educators either by phone or in person each year.
Have telephone or in person contact with *interim* ministers or DREs at least once every three months
Meet in person or via phone with new ministers and/or DREs in the district within 60 days of their arrival.
Ensure distribution of lists with the addresses of ministers, religious professionals, and congregational presidents.
Provide for board training workshops each year
Provide evaluation processes for district services (consultations, workshops, etc)
Provide for workshops on staff start-ups for all new congregations and congregations with newly settled ministers and/or DREs, congregational covenant of right relations, mission-vision, and social justice upon request.
Do triage of conflicts in the congregations and refer to conflict team if possible and appropriate
Conduct interviews with prospective candidates for the DRE Credentialing Program
Conduct interviews with prospective ministry candidates
Establish and work with DE and/or PC advisory committees
Provide for Transition Interviews for departing professional religious leaders (Ministers and DREs)
Provide for lay leadership development opportunities through workshops, seminars, etc
Research and apply for grant proposals when appropriate
Facilitate the creation of clusters or “area councils” in my district
Attend at least 50% of all UUMA meetings and retreats and report as requested
Attend at least 50% of all LREDA meetings and retreats and report as requested

Assist UUA departments, etc with tasks related to congregations
Attend BCM, GA, and District Staff Cluster meetings
Supervise district staff
Ensure that district newsletter is published or electronic communication maintained, i.e. web site and on-line resources
Present a report to the district board at every meeting or when determined in Policy Governance structures
Ensure appropriate district committees are functioning for example: finance, by-laws, personnel, nominating, growth, YA/CM, A-R/A-O, DYSC or YAC etc
Ensure the Annual Meeting/Conference is held each year, including the granting of Awards
Ensure the maintenance a district library
Ensure that a Chalice Lighters Program is functioning
Ensure that an APF committee/person is functioning
Ensure that Compensation Consultants are functioning
Participate in the leadership council meetings
Ensure various consultation teams are functioning
Ensure a Safe Congregations Team/Committee is functioning
Ensure Ministerial and DRE Settlement Reps are functioning
Meet regularly with the District UUA Trustee
Deliver sermons/significant addresses as possible
Attend district installations and ordinations as available
Engage in professional continuing education opportunities
Engage in personal growth and self care

Appendix L
Challenges at a National Level

Challenge #1 – How can the unique Boundary Spanning roles played by District Staff best be leveraged in support of a more effective organization?

The organizational literature is full of studies of the importance of Boundary Spanning roles in any organization. One recent study from Stanford University noted their positive impact on strategic decision-making. Several other studies talk of the importance of these roles in organizational communication.

District Staff play unique Boundary Spanning roles in our Association, transmitting and interpreting messages between our congregations and the headquarters of the Association that serves those congregations. We are positioned in such a way that we can see both the national landscape and the local level, informing congregational leaders about the Big Picture, trends, and resources, while articulating the needs of those congregations in a language understood by those working at the national level.

Challenge #2 – How can we advance our use of technology to expand services, build networks, work across geographic distances, lower costs, and be good stewards of our environment?

Most of us easily recognize the advantages of using email lists, conference calls, and Persony to connect people across distances. Understanding how to make good use social networking sites, blogs, and podcasts is a bit less clear, and we are just at the earliest stages of appreciating the possibilities of Web 2.0. We need to identify what specific training and equipment needs would most help us serve the congregations, and look for ways to share expertise and finished work across regions.

Challenge #3 – How can we best support our congregations in engaging youth and young adults in daily congregational life?

Too many of our youth and young adults tell us that they find their spiritual homes outside of our congregations. Many, if not most of our congregations say they want more age diversity, but few are making the kinds of changes that would make a difference. How can we learn from those congregations who are succeeding in their ministries to youth and young adults, and engage the minds and hearts of congregational leaders in this crucial work?

Challenge #4 – How can we identify and create structures to support ministerial development?

(a) The predicted clergy shortage may already be in its first wave as the Baby Boomers move into retirement. Searches are taking longer, and Interim and Consulting Ministers are harder to find.

(b) Our newest ministers are typically called to our smallest congregations, often those who are geographically isolated, so they end up serving in areas with few colleagues close at hand, working with less sophisticated lay leaders. Yet those are the lay leaders given the task of "growing a minister, without being given so much as a pamphlet telling them how to do it. Ministerial mentors are invaluable, but don't see the new minister in action, so have only part of the picture to work with.

(c) Both ministers of color and their congregations need specialized support; District Staff should be included in the early stages of this initiative so that we will have the tools to provide ongoing support at the local level.

Challenge #5 – How can we create a culture of generosity?

Studies show Unitarian Universalism to be significantly below every other major religious group in American when it comes to our level of giving to our faith. Other social researchers have found that political and social liberals give far less to charitable causes than do conservatives. How can we find ways to promote a theology of gratitude and a spiritual practice of generosity that will strengthen our ability to fulfill our religious mission?

Challenge #6 – How can find and implement better strategies for growing our membership?

(a) We need to help our congregations gather the data necessary to target their growth efforts well. Do they get enough visitors? Do those visitors return? How well do they convert visitors to members? Do new members "stick," i.e., how well are they integrated into the life of the congregation? Each of these requires a different set of strategies.

(b) How can we make worship more consistently meaningful to members and visitors?

(c) How can we become more welcoming to those who are less like those of us already in the pews?

(d) What special support is required for the 50% of our congregations with membership under 100? How can we meet the need for professional ministry for our smallest congregations?

Challenge # 7 – How can we best support our members deepening their faith, their sense of UU Identity, and their connection to one another?

In spite of decades of work, most of our congregations still lack compelling missions that serve as a focus for their work and define them as faith communities. Most of our members come from other faith traditions and, increasingly, from no previous faith tradition, yet we still treat Adult Religious Education as a casual option, and we seem to be satisfied with a set of disconnected dots rather than creating any sort of intentional path for learning about our chosen faith.

Challenge #8 – How to be most effective in lay leadership development?

No other key congregational position turns over more frequently than that of Board President. The need for spiritual and practical leadership training is an ongoing imperative, and we must have a wide assortment of tools, templates, learning modalities and other resources to make sure our lay leaders get the ongoing support that is required if they are to play their crucial roles well. We also need good systems in place to help our lay leaders find their ministries, to create structures of leadership succession, and promote reasonable and healthy tenures.

Challenge #9 – How can we incarnate our faith and make a difference in the world?

We have many successes in this area that we can take a lot of pride in, but most of this work is still done by a handful of "social justice types" in each congregation. And, at the national level, the SAI process bounces us to a new priority every couple of years that often gets little attention at the congregational level. Yet we know, most especially for our youth and young adults, that people have a yearning to make a difference in the world. How can we help our congregations discover their own social justice ministries so that they can be making a real difference in their local communities?

Challenge #10 – How can we continue to build and enhance relationships across congregational boundaries?

In the end, we are a covenantal faith based on a network of relationships, and we re better together. How can we best build trust and respect between the congregations and our UUA? How can we network groups in geographic clusters, regions, and at the national and international level? How can we find common ground with other faiths and be of ever increasing service to our world?

Appendix M
Plan for UU Congregational Growth – DRAFT
Created by the UUA Growth Team – Revised January, 2009

The Role of the Association Staff in Congregational Growth

Congregations create numerical growth. UUA staff can help by:

1. Holding up a vision for growth that inspires and motivates congregations to grow.
2. Partnering with congregational leaders who want to grow by providing support and resources and inspiration.
3. Equipping leaders, lay and professional, who can advance our faith and help ensure strong leaders have resources to prepare for future roles.

Vision

Our vision is to open the doors of Unitarian Universalism to those who yearn for a liberal religious home and help make certain our religious homes are vital, healthy, mission-driven and growing.

We know from our congregations that have experienced rapid growth and from the success of our marketing experiments that there are thousands and thousands of persons and families "out there" who are searching for what we find every week in our congregations. And we know when congregations take hospitality seriously their spiritual life is deepened and enriched.

We are called to offer ourselves to those who are, in the words of Rev. Barbara Pescan, "down in the valley, trying to get home."

Goal

Our partnership with congregations will seek, at a minimum, an overall 2% growth rate per year versus the 1% per year we currently achieve.

Growth Strategies

1. Create a sense of urgency about growth. Convey the importance of numerical growth as an indicator that we are living our faith -- opening our doors, being welcoming, and including those who seek a liberal religious community within Unitarian Universalism.

6) Develop a communications strategy around growth that provides evidence of the

yearning that exists in our culture for liberal religious faith. The strategy would convey both how much more impact our faith could have on society if we were numerically larger and how preparing ourselves for growth can transform our congregational (and personal) lives.

7) Encourage and support the identification, recruitment, training, and support of entrepreneurial individuals, including those from culturally marginalized groups, who could serve our congregations and help lead the charge towards numerical growth with diversity.

8) Create expectations and raise the accountability of all UUA staff groups around the support and encouragement of numerical growth in our congregations.

9) Review all policies and practices of the Association. Keep those that support numerical growth, and revise those that may inadvertently work against growth.

2. Encourage, support, and promote a culture of "congregations learning from congregations".

- Organize a national Growth Consultation whereby some of the fastest-growing UU congregations in the nation can share insights and experiences relevant to others wanting to grow.
- Expand the Breakthrough Congregation efforts, including the support of mentorships which link Breakthrough Congregations with other congregations seeking support and guidance in their growth efforts.
- Encourage congregations to be in relationship with one another for the larger purpose of training, mutual support and encouragement, learning from one another, social witness, and creating a larger impact to the larger community.
- Create organizational incentives for congregations to send multiple leaders to growth workshops and conferences. Encourage UUA staff members to provide training programs for multiple, versus single, congregations whenever possible.

3. Support local energy for growth.

- Increase the number of local marketing campaigns from one to three annually. Focus on where conditions are right which includes an existing passion for growth, local funds to support partnering in a marketing campaign, and the potential for numerical growth.
- Encourage and support experiments, including multi-racial co-ministries, that have the potential to increase membership significantly, such as multi-site ministries, regional and metro growth strategies, planting congregations in underserved areas, and exploring storefront churches.

- Identify twelve congregations with significant potential to grow and ensure the focused, customized, and on-going support of the Association is provided to them.
- Lift up the value of a national awareness campaign that will augment local marketing campaigns.

4. Support organizational and congregational culture change to achieve numerical growth:

- Identify the most useful growth resources and focus on providing them at no cost or low cost to congregations ready to apply them towards numerical growth. These will include Planning for Growth Workshops, multimedia resources (CDs, DVDs, etc.), assistance in increasing stewardship capacity, JUUST Change consultation, and help with size transitions workshops.
- Consider financial incentives for congregations with strong numerical growth.
- Help congregations develop ministries to retain current members.
- Assist congregations develop innovative ministries to attract more young adults and to support retention of youth.
- Continue to make available UU University, Lifespan Faith Development materials, and other lay leadership training currently available and ever evolving.
- Help ensure an anti-racism/anti-oppression/multicultural approach to numerical growth is incorporated into all efforts.
- Provide resources that translate Unitarian Universalism to diverse social and cultural contexts.
- Develop resources to encourage and support spiritual deepening and theological education for lay Unitarian Universalists.

5. Model and encourage the use of measurements and evaluation to assess and learn from experience.

- Ensure both short-term and long-term independent evaluation is conducted of major growth initiatives to assess effectiveness and inform future efforts.
- Identify where the staff and other resources of the Association can make the most difference in numerical growth and focus energies in those areas.
- Encourage congregations to collect demographic information that help assess the effectiveness of outreach strategies to specific demographic groups such as youth and young adults, families with children, racial/ethnic groups. Encourage techniques that allow members to self-identify among a variety of identity factors.
- Examine building & loan practices and modify to encourage congregational growth.

- Analyze the “front door – back door” phenomenon in which congregations add new members, but have as many leave membership.

And to make these strategies robust and effective,

6. Raise significant funds in the *Now Is The Time* comprehensive campaign to support the growth of Unitarian Universalism.

- Encourage *Growth in Numbers, Growth in Diversity, Growth in Spirit, Growth in Leadership*, and *Growth in Witness*.

Establish the habit of an annual congregational stewardship event, *Association Sunday*, which will celebrate our relationships and raise funds for our common work.”

Appendix N
Congregations Come First Report, January 2008

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

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

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

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

A Vision Consistent with Unitarian Universalist Values

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

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

· Increased connectedness and cooperation among congregations;
· Increased congregational participation in the life of our Association;

· Promotion of right relationship in funding systems and resource allocation; and
· A generous spirit of faithful stewardship.

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

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

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

The Promise and the Challenge

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

Effectiveness

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

Ì Articulating identity for our faith by creating the new DVD "Introduction to Unitarian Universalism"

Ì Deepening our faith by publishing the new Tapestry of Faith curriculum online

Ì Working to increase our rate of numerical growth by establishing a national growth plan, a growth consultation with ministers of the fastest growing congregations, and launching the new national marketing campaign.

Ì Supporting ministers of color and the congregations that call them because diversity is key to our growth into the future.

Ì Recognizing Breakthrough Congregations and helping others learn from them.

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

Ì The five New England districts organized a regional conference on ministry and leadership in lieu of separate district conferences. This has become an ongoing

event. Ballou Channing and Mass Bay District will be holding a joint spring event.

Ì Metro NY, St. Lawrence, Joseph Priestley, and Ohio Meadville District staff worked together to create a successful new Leadership Institute.

Ì In several places, congregations have networked to develop statewide legislative ministries. California, Washington State, and Massachusetts have paid staff leading this.

Ì A new level of collaboration among our UUA, the district, and local congregations is helping our growth efforts.

and yet…

We currently have just about 160,000 adult members, about the same number as 46 years ago. During that same time, the U.S. population has grown by 50%. In the last 20 years we have fared better, yet are still growing at a rate of just one person per congregation per year.

In the last decade, 1.5% of our congregations (16), have accounted for 25% of our growth; about 1/2 of our congregations have grown and about 1/2 have declined.

We have a part-time office for service to large congregations, but we have nothing comparable for midsize or small congregations, and yet congregations of all sizes are asking for more specialized services.

While future-oriented organizations effectively develop and use networks -- multilateral collaboration that connects them not geographically, but according to interest and need -- we have little expertise in social networking or the technology that supports it.

and we wonder…

? How could we more effectively organize ourselves as we move into the future?

? What would the structure and accountability of our system look like to reflect growth as a priority?

? Will the initiatives listed above lead to systemic change?

? Are we changing quickly enough relative to changes in the larger society?

Equity

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

technical and personnel resources.

We affirm the following district initiatives:

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

Ì The four districts of NRG [New Regional Group of St. Lawrence, Joseph Priestley, Ohio Meadville, and Metro New York], recognizing disparities of resources, developed and implemented a plan to share specialized staff in order to provide congregations equitable access to expertise.

Ì Several districts are investigating how to share district-focused software and IT support and systems.

and yet…

In Southwestern UU Conference, a large geographic district, two full-time professional staff members and one full-time equivalent administrative position serve 76 member congregations and five emerging congregations. In the relatively smaller and more compact Joseph Priestley District, six professional staff (four full-time, two half-time) and two administrative (one full-time, one half-time) serve 64 member congregations and four emerging congregations.

The ratio of district staff members per congregation ranges from 1:11 to 1:45.

The amount that our UUA reimburses districts to support their offices ranges from $23,000 to $78,000 due to financial agreements dating back as far as 1982.

-- On a "dollars per congregation" basis, the reimbursement ranges from less than $500 to over $1,600.

-- On a "dollars per member" basis, the reimbursement ranges from less than $4 to almost $12 per member.

While some districts are hiring additional specialized staff, another is requesting a line of credit from our UUA to pay its one staff person.

and we wonder….

? What if all congregations had access to resources in roughly the same ratio?

? What if all congregations had access to specialized staff and services based upon their needs rather than their location?

? Can we imagine a more equitable method to distribute money and other resources

or share costs between and among districts?

? How would the structure and accountability of our system need to change for equity to be a reality?

Covenant

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

Collaboration among congregations:

Ì There are clusters working together for growth and/or starting new congregations in many areas: north Texas, Philadelphia, northern Connecticut and central Massachusetts.

Ì Though their joint media campaign ended several years ago, the congregations in the Kansas City area continue to work together to develop new cooperative initiatives.

Ì Ministers from congregations in Minneapolis and St. Paul collaborated to create a five-session lay theological education series, “Faithful Conversations”, for local lay leaders.

Ì There are new social justice efforts that include one or more congregations in partnership with the UU Service Committee.

Collaboration across district boundaries

Ì Prairie Star District’s online speakers/artists/musicians bureau is being expanded to the Central Midwest and Heartland Districts, in collaboration with the UU Musicians Network (UUMN).

Ì St. Lawrence and Joseph Priestley districts are collaborating with the Annual Program Fund staff on joint requests for 2008 APF and district contributions.

Partnerships that cross traditional organizational boundaries

Ì The Annual Program Fund Committee is creating new partnerships with groups including LREDA (the Liberal Religious Educators Association) and the staff of the Ministry and Professional Leadership staff group. The APF staff is consulting with Lifespan Faith Development about generosity and stewardship for children and youth.

Ì In October 2008 the District Presidents Association and UUA Board of Trustees will work collaboratively to set ends (what good should be done for what folks at what cost) for our Association.

Ì The Association-wide conversation on Excellence in Ministry is being guided by a new partnership that includes the Unitarian Universalist Ministers Association, UUA Board, Panel on Theological Education, the UUA Administration, and staff from Ministry and Professional Leadership.

Possible system-wide indicators of cultural change

Ì Starting in 2004, increasing numbers of congregational presidents responded to Gini and Bill's invitation to come to General Assembly. A growing number of presidents see their GA attendance as part of their congregation's relationship to the Association.

Ì Congregations throughout the Association stepped forward to create relationships in support of our Gulf coast area congregations that were affected by hurricanes Katrina and Rita, providing financial help, leadership support, chaplaincy and pastoral care, as well as hands-on assistance – the spirit of our covenant moving among us.

Ì Significant language changes:

Ì More Unitarian Universalist leaders are talking about "**our** Association" rather than "the UUA" or "Boston."

Ì The UUA Board voted in 2004 always to describe General Assembly as "a meeting of congregations."

Ì Conversations among UU leaders reflect a growing understanding that our Association refers to the member congregations, not the board or staff.

and yet….

At General Assembly 2004, two-thirds of the over 300 congregational presidents in attendance reported that they felt unconnected to neighboring congregations, the district, and our UUA; they felt isolated.

When a large church partnered with the UUA to start a new congregation, some of the area churches worked to stop the initiative, concerned that a new congregation would compete for members.

Congregations in one district were impacted when a large congregation chose to pay its APF contribution but not to pay its district dues after an unanticipated expense. A consequence of this choice was the unpaid leave of several district staff members.

A congregational president knew of a neighboring UU congregation, three miles away, that was having difficulty with its annual canvass. The congregational president and his board discussed the troubles of the neighboring congregation

without any sense whatsoever that they might offer any sort of assistance -- not necessarily financial, but moral support or perhaps stewardship resources based on their own recent successful canvass. This is not an unusual story.

While the majority of congregations contribute fully to our Association and their districts each year, some congregations pay only a portion of their APF contribution and yet expect or need full services.

and we wonder…

? What is the quality of relationship in our Association of Congregations?

? Are our relationships covenantal or contractual?
? How could we strengthen our connections?

? What if we were an Association of Congregations in which all congregations embody our bond of connectedness with each other so that we advance our common purpose and no congregation is alone in its work?

? While the number of positive examples is growing, do they represent systemic collaboration, or do they simply rely on the personalities and preferences of our current leaders?

? How do we structure cooperation and covenantal relationships into our accountability?

What We Ask of You

Consider and invite conversations about the questions raised in this report.
Join the conversation at CCF workshops at the Large Congregation Conference and at General Assembly.

Identify ways or methods by which we might live out our covenant more fully and with deeper meaning.

Share your stories of how your congregation or district is addressing these values so that others might learn from your experiences.

Please send your comments to ccfcomments@uua.org.
The CCF Team:
5) Gini Courter, UUA Moderator, Co-convener
6) Rev. Harlan Limpert, Director for District Services, Co-convener
7) Roger Comstock, UUA Trustee, Northeast District
8) Nancy Heege, District Executive, Prairie Star District
9) David Friedman, UUA Trustee, St. Lawrence District
10) Rev. Bill Zelazny, District Executive, Ballou Channing District
11) Joe Sullivan, District President, Southwestern Conference, a district of the UUA

12) Elyse Reznick, District President, Joseph Priestley District
13) Barb Brown, General Chair, Annual Program Fund Committee
14) Laurel Amabile, Director, Annual Program Fund
15) Rev. Mark Gallagher, Minister, Michael Servetus UU Church, Vancouver, WA
5) Rev. Stephan Papa, Special Assistant to the UUA President for Growth Funding
6) Eva Marx (note taker), UUA Trustee, Ballou Channing District

Appendix

The Development of District Services and Prior System Studies

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

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

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

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

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

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

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

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

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

for the APF which has been considered fair by all.

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

Commentary

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

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

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

Appendix O
Assessment Tool

This is a brief survey from our Unitarian Universalist Association, asking Congregational Leaders for your perspectives on how well our District serves congregational needs and supports Unitarian Universalism overall.

We are seeking a maximum of two responses from each member congregation in our District. One response should be from the Board via the President/ Moderator (or designated respondent). The other response should be from the staff, via the Minister or designated staff respondent. We encourage each group (Board and Staff) to meet as teams to discuss your response, but you can simply delegate this to your appointed respondents if you wish.

The survey is divided into five sections. It should take you no more than 10 minutes to complete. Please respond by [DATE].

Thank you in advance for your participation! We will share the results for our District in [SPECIFIC TIME FRAME].

Yours,

[Name of President], [Name of District] President

[Name of DE], [Name of District] Executive

Section I – About You

4. Which congregation do you represent?
5. On whose behalf are you responding to this survey?
    6. Representative of congregation's board
    7. Representative of congregation's staff
8. My responses
    9. Include input from my entire team
    10. represent my perspectives only

Section II – District Purpose

- What do you see as the most important purpose of our District?
- How could/does your congregation actively shape District programs?

Section III – District Services and Programs

Here are some typical District roles, services and programs. Please indicate to what extent you believe these aspects are important. For those items you believe "Essential" or "Good to Do," please also rate how well our District address these aspects. If you believe the area is not important, let us know if you think the District should de-emphasize this aspect or maintain it as is.

1. Congregational Consulting Resources
2. Search for Ministers
3. Search for Religious Educators
4. Search for other staff
5. Capital Campaigns
6. Financial management
7. Worship
8. Children's Religious Education Ministry
9. Youth ministry
10. Young Adult/Campus Ministry
11. Lay pastoral care
12. Social justice/witness
13. Conflict engagement/transformation
14. Referrals to other specialists

Comments:

15. Education and Training of Congregational Leaders
16. Understanding and promoting Unitarian Universalism
17. Developing lay leadership
18. Conflict transformation

19. Program/Ministry development
20. Stewardship/giving/generosity
21. Administrative “best practices”
22. Risk Management
23. “Right size” Governance
24. Board Retreat Facilitation
25. “Start Up” workshops for new Religious Professionals (with Board/Leaders)
26. Continuing education for religious professionals
27. Training for administrative/program staff

Comments:

28. Advocacy and Prophetic Voice
29. Membership growth in congregations
30. Creating new UU congregations
31. Welcoming Congregations/BGLTQ
32. Green Sanctuaries/Environment
33. Anti-Racism/multicultural diversity
34. Other diversity (age, class, education, ability, employment, etc.)
35. Supporting the UUA Annual Program Fund
36. Attending UUA General Assembly
37. Participating in other UUA programs

Comments:

38. Communicating with Congregations
39. Regular news/newsletter
40. Useful website/web-based resources
41. Linking congregations to one another
42. Promoting cluster/collaborative activities/programs

43. Linking/referrals to other UUA staff/resources
44. Appropriate & effective use of email/print/other communications
45. Meaningful Annual Meeting
46. Opportunities for other district gatherings (physical/virtual)

Comments:

Section IV – Interaction with District

- In general, how likely are you to call upon the District for any of the previously mentioned programs or services?
    - Very Likely
    - Likely
    - Not Likely
    - Other/No Answer

Comments:

- Generally, District Staff are: (scale = Exemplary, Acceptable, Needs Improvement)
    - Readily and reliably accessible
    - Courteous and respectful
    - Knowledgeable and helpful
    - In regular, direct contact with our congregation
    - Responsive to requests for assistance
    - A positive reflection on our Unitarian Universalist Association and values
    - Open to creative ways to further District goals/ends

Comments:

Section V – General Comments

- Have you one suggestion that would help our District serve you and/or your congregation better?
- Is there anything else you would like to tell us?

- Have you one suggestion that would help us improve this assessment survey next year?

Thank you!

The mission of the UUA Districts is to serve as a resource for local congregations and to help extend Unitarian Universalist influence in the larger community.

The mission of the District Staff is to foster the spiritual and institutional health of Unitarian Universalism by serving as leaders, consultants, advocates, and educators in our community of congregations.

Please call upon us whenever we can be of assistance.
Thank you for your time and commitment to our shared ministries.
Your District Board
(insert names)
Your District Staff:
(insert names)

District Address and Contact Information

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