

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

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

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**Excellence In Ministry**

- **Dreaming Big** - The program for 20 potentially excellent larger church ministers funded by the Panel on Theological Education (POTE) had its second retreat in St. Paul, MN, February 7-10. More information on Dreaming Big can be found in the October 2008 and January 2009 Board Reports.
- **Living Into Covenant** – (Previously Nurturing Excellence in Transformational Ministry) Also funded by POTE, Living Into Covenant continues as the in-care program for UU seminarians in non-UU schools. Work on this project is a three way partnership with MPL, District Services and representatives from the local UUMA Chapters. Congregations will also participate. The pilot program was developed in the Mountain Desert District (MDD) for Iliff students. The grant makes it possible for the MDD program to be further developed and to spin off programs in New York, Minneapolis and Seattle.

**MPL Budget** - All non-essential travel has been cut along with staff participation at GA. MPL will have two fewer staff present and the rest of us will be there for fewer days. Moving two of the three MFC meetings to Boston for the next couple of years will be very helpful.

**The Professional Leaders Coordinating Council (PLCC)** – The PLCC has been discontinued for the time being. Member organizations of the PLCC are: UUMA, UUMN (musicians), LREDA (religious educators), AUUA (administrators), SCM (community ministers), AIMs (interim ministers), and UURMAPA (retired ministers). The group was started about 5 years ago, but has not coalesced around a clear mission. The participants are all volunteers who are already busy enough with paid jobs and leading their professional organizations. Funds are especially tight and this doesn't feel like the best use of them at this time. Each of the groups has an MPL liaison and I try to keep in direct contact with them as well.

**Service of the Living Tradition** - As I mentioned in January's report, the SOLT will be Friday instead of Thursday and begin at 8:30 p.m. instead of 8:00 p.m. this year. The Music Director is Ken Ewan from the Unitarian Universalist Church in Cherry Hill, NJ. Several UU Musicians completing their credentialing program will be honored along with the ministers and religious educators for the first time this year.

**Upcoming Travel** - March 23 – 29 Ministerial Fellowship Committee, Chicago

**Ministerial Development**  
**Jory Agate, Margaret Montore**

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**Addictions Ministry** - The Addictions Ministry Team met in Boston in February. They are gathering material to launch a website, compiling resources to help support congregational programming and planning workshops for GA. They were pleased to add Rev. Monica Cummings to the Team.

**Dreaming Big** - The second of 6 continuing education retreats for ministers hoping to serve in large congregations was held in February in St. Paul, MN. The program focused on governance, strategic planning, multiculturalism, membership and religious education. Our next retreat will be held in Albuquerque in April.

**First Year Ministers' Seminar** - 36 ministers in their first year of community and parish ministry gathered in Boston for a February retreat. Martha Niebanck and Keith Kron assisted me in leading the retreat. This retreat was made possible by the generosity of an anonymous donor.

**Culminating Chapter** - The Ministerial Development Office is sponsoring a conference called "Creating a Culminating Chapter for Your Ministry" for ministers who see themselves as retiring in 5-7 years. This is a program designed to enable ministers to vision and craft a legacy and final shape of their ministry so that they don't enter into retirement in burnout. The Office of Church Staff Finances will be joining the program to assist in retirement planning. It will take place from April 13-17, 2009, in Jacksonville, FL. So far 33 ministers are registered for this.

**Preliminary Fellowship** - There are currently 284 ministers in Preliminary Fellowship and 37 ministers in Inactive Fellowship Status.

**Continuing Education** - Since the beginning of this fiscal year that began July 1, 2008, \$61,562 has been allocated to approximately 138 ministers for continuing education grants. Last year a total of \$71,750 was granted to 172 ministers for continuing education.

This summer our office will co-sponsor with the Mass Bay District a conference on Heifetz and Adaptive Leadership led by Rev. Teresa Cooley.

**Deceased Ministers** - The following are the ministers whose deaths we have learned of since December 2008:

Max Coots	1927 - 2009
Ora Eads	1914 - 2008
Webster Lardner Kitchell	1931 - 2009
Guy Wheeler Meyer	1914 - 2009
Thomas W. Martin	1947 - 2008

Mary C. Nelson	1926 - 2009
John R. B. Szala	1935 - 2008
Wilfrid Walter Ward	1935 - 2009

*We will remember them...*

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

## **Transitions Office**

### **John Weston and Emily Schwab**

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In the search year now coming to fruition it looks unlikely that more than forty ministers will be called to full-time ministry. This represents a thirty percent decrease in the average number of ministers called to a settlement new to them, whether their first or their fifth, of fifty-nine per year. This decrease has been Association-wide:

- the number of congregations in search has dropped by a third
- the number of ministerial indications of interest in positions offered has dropped at least as much
- to date at least six of the reduced number of congregations in search have either cancelled their search or come up empty.

There seems little question that both congregations and ministers are hunkering down in the face of the current economic ill winds.

The Transitions Office is careful not to describe a search in which a candidate is not found as “failed search.” The only failed search is one in which the search committee recommends a minister not a good fit with the congregation!

AIMs (Accredited Interim Ministers), AIMITs (AIMs in Training), and ministers applying for such status will gather in Houston in mid-April for training and preparation for deployment. The roster numbers forty-six at present. There having been a shortage of interim ministers in the past couple of years, we are heartened by the continuing influx of AIMs-to-be. Ministers planning to conduct their first interim ministry in 2009-10 will attend the Orientation to Transitional Ministry in Boston in July.

Some eleven ministers of color and members of traditionally marginalized communities have indicated interest in at least one congregation, and two will be attending the AIM Seminar.

The Transitions Office is working with the Information Technology Services staff group on a major upgrade of the online Ministerial Transition System, a.k.a. the Ministerial Settlement System. Overarching goals include improved security, flexibility, reliability, independence, and access to information for all users. Specific goals include improved service to ministers in search of opportunities in community ministry and to District staff, smaller congregations, and ministers in publicizing and facilitating placement in consulting ministry positions. The great leaps forward in the quality and sophistication of the UUA’s IT resources in the ten years since the inauguration of the Settlement System are something to behold!

## **Religious Education and Music Leadership Credentialing**

### **Beth Williams, Paula Welling**

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#### **Religious Education Credentialing Program**

There are currently thirty-two active participants in the program. Five of these candidates will meet with the RECC at their April 2009 meeting. During the last reporting period one applicant was accepted into the program, one candidate was put on hold status, one candidate was put on inactive status, and one candidate withdrew from the program. At the April 2009 meeting, the RECC will welcome new member Tandy Scheffler. Tandy is from the Thomas Jefferson District and will serve as the LREDA Liaison. After the April meeting Jan Devor, from the Prairie Star District, will assume the Chair of the RECC. Beginning in FY10, the RECC will meet only once per year in person as a cost saving measure. Another meeting will take place via conference calls. Also at the April 2009 meeting the committee will be finalizing some changes to the program to enhance it for participants. The proposed changes have been discussed with the Board of LREDA to get their input.

**Renaissance Module Training for Religious Educators** - Six Renaissance module trainings were conducted in the last reporting period, with six additional modules scheduled so far for the remainder of the fiscal year.

**Music Leadership Credentialing Program** - The LDB is preparing to credential the first class of six candidates in May, 2009. These candidates will be honored at GA and at the UUMN annual conference. A slate of proposed members is being developed for a presidentially appointed UUA music leadership credentialing committee. We are in the process of recruiting new candidates for the credentialing program.

**Interim DRE Training** - An Interim DRE Training has been scheduled in Boston July 8 – July 10, 2009. Faculty includes two experienced interim DRE's from the Joseph Priestley District, Michele Grove and Karen Scrivo.

#### **Office of Worship and Music Resources**

### **Erik Walker Wikstrom**

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The expansion of the WorshipWeb continues! Working with the Office of Electronic Communications we invited clergy, religious and musical professional and lay worship leaders to send us their sermons and other responses to the historic inauguration of President Barack Obama. (This initiative was in conjunction with one initiated by the Library of Congress.) These sermons have been archived within the WorshipWeb collection and a special index page has been created. I've also begun the project of making WorshipWeb more than a searchable database of service elements -- it will soon have a section of material on worship theory, including essays by the Joint Commission on Worship and the Congregation of Abraxas, as well as excerpts from *Worship That Works* by Wayne Arnason and Kathleen Rolenze and *Neopagan Rites* Isaac Bonewitz. This worship theory project has been a training ground for staff in OEC.

Stewardship and Development, the UUMN, and I have been talking about the development of a new component of the WorshipWeb -- an online database that will make UU composers (and their compositions) more readily accessible to the music professionals in our congregations, and I continue to find more ways that the WAMR office seems positioned to help with the work of the Association.

### **Ministerial Credentialing**

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

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Since the January 2009 UUA Board meeting, I have visited with students from Andover Newton Theological School and met with several administration and representatives of Seattle University in early February, prior to my meeting in Denver with other stakeholders supporting of the "Living into Covenant" initiative funded by the UU Congregation at Shelter Rock through the UUA Panel on Theological Education.

The most significant development this winter has been working with the UUA Leadership Council in their efforts to balance the FY 2010 budget by getting creative to provide the same level of service to ministerial aspirants following a significant cut in the RSCC budget.

Kim Wilson, Sofia Betancourt and Alicia Forde successfully developed Diversity of Ministry Team internship sites at five congregations. This year, however, the number of interns of color/from traditionally marginalized communities seeking internship sites was low. Only West Shore in Cleveland, OH has successfully made a match to date.

This past quarter was the annual peak of intern-site matches. As of mid-March, new internship placements total 21, down by about a third compared with the past few years at this time. Time will tell whether or not this is a significant change.

The MFC policy expecting all interns to have met with an Regional Subcommittee on Candidacy prior to starting the internship will go into effect this fall. In general, implementation of the new policy has gone smoothly. We are hopeful that the new policy will decrease the percentage of unsuccessful internships we saw in the past.

Of six Internship Stipend Grants that were awarded to congregations for the 2009-2010 year, five have found interns. Kim is in the process of applying for a grant from the St. Lawrence Foundation in order to support a community-based internship. We have received similar grants for the past three years.

Closing on a more personal note, since the last Board meeting, I spent time in Mississippi helping a friend, a descendant of Thomas Jefferson, to research an ancestor who was a prominent slave holder. During my sabbatical, I will be co-authoring a book on what we have learned as white people who are descended from slave holders. We are both part of the initiative, "Coming To the Table" (CTTT) out of Eastern Mennonite University which brings together descendants of formerly enslaved people and slaveholders to create a new legacy around racial reconciliation.

## **Office of Church Staff Finances/UUA Health Plan**

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

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The Office of Church Staff Finances manages the UUA Health Plan, Retirement Plan, and Group Insurance programs and oversees many of the aid funds providing financial assistance to ministers, surviving spouses/partners, and other church staff. We also shepherd development of the Salary Guidelines and coordinate the District Compensation Consultants program. If I can be of assistance to you, please don't hesitate to call at (617) 948-6456 or email at [rnugent@uua.org](mailto:rnugent@uua.org).

**Fair Compensation** - Our office is responding to inquiries from congregations concerned about the 2009 Salary Guidelines which were adopted by the Compensation, Benefits and Pension Committee at its October 2 meeting. In doing so, we are learning that some congregations believe the Salary Guidelines are directly linked to changes in the cost-of-living rather than actual wages for comparable work. In the coming month, we will be preparing a detailed Frequently Asked Question document for publication on the UUA website and for distribution by the UUA District Compensation Consultants. The Compensation, Benefits and Pension Committee next meets in April.

**UUA Health Plan** - The UUA Health Plan is performing slightly ahead of projections for the first two months of 2009. The Trustees of the UUA Employee Benefit Trust (EBT) worked with the Plan actuaries to more closely align pricing with surplus projections, deliberately slowing surplus accumulation in favor of holding plan costs as low as possible for participants. The Plan is on target to increase surplus to a level that will represent about six month's premium by the end of 2009.

We have begun to see action from the Obama administration on healthcare reform. As we had predicted, the state programs for children (sCHIP) have already been strengthened. Additionally, laid off participants will begin to see some immediate relief on their COBRA premiums.

At its meeting on March 28, 2009, the EBT will meet with the independent consultants who drafted the report that is included in your packet, with an Executive Summary and comments from EBT Chair Paul Bluestein. Overall, the report you commissioned offers a strong endorsement for the program and the management.

At its March meeting, the EBT will also tackle the issues of performance metrics and benchmarking against best practices. We believe that by setting high – and measurable -- standards, we can stay ahead of the curve for the foreseeable future. For more information: Jim Sargent, UUA Health Plan Director, at [jsargent@uua.org](mailto:jsargent@uua.org) or (617) 948-6405.

**UU Organizations Retirement Plan** - The OCSF has been preparing an IRS Form 5300 filing for the UU Organizations Retirement Plan. The Form is required to be filed every seven years, and the Office had been relying on the advice of Ropes and Gray, our former pension attorneys, to keep the Plan in compliance. When we learned that not only did they give us only two weeks' notice to prepare the very complicated form, but also that the plan had not been updated with the

latest legislative changes, we ended our relationship with them. Subsequently, we have engaged the pension administration division of Mc Dermott, Will and Emery. MW&E have been very helpful and the filing and updating of the Plan will be complete by the time of your meeting. The Plan will remain in compliance with the IRS.

The unexpected complication of preparing the IRS filing has slowed down the work on reviewing the competing bids for administration of our retirement plan. We are considering two proposals: one from Fidelity Investments who is our current administrator, and one from TIAA-CREF. The completion of this process will include a brief survey to plan participants, both active and retired or terminated to learn what they want from a plan administrator. We plan to have this work completed by the summer.

We continue to field many calls from Retirement Plan participants in response to the continuing volatility of the Stock Market. This is an extraordinary difficult time for the staff of our congregations and retirees. For more information: Joyce Stewart, UUA Retirement Plan Director, at [jstewart@uua.org](mailto:jstewart@uua.org) or (617) 948-6421.

**Group Insurance Plans** - Our Long Term Disability Plan is a crucial safety-net for congregation staff if serious illness or accident requires the individual to stop working. While 975 individuals are currently enrolled, many more are eligible. Several congregations each year face the moral and financial dilemma of responding to an employee who becomes disabled but wasn't enrolled in our plan. It is a difficult time for everyone involved. In the coming year, our office is going to launch a major marketing campaign to enroll more of our staff in the plan. Anyone working half-time is eligible. The cost is only 1.0 percent of salary (or salary and housing for ministers). In addition, we are looking at adding an important benefit to the plan that will close a major hole in the safety net. Presently when a staff member becomes totally disabled, they usually must pay for their own health insurance premium. The result is a substantial increase in household expenses at the same time as income decreases. We are looking at having the LTD Plan pay the premiums (up to a set monthly maximum). If we are successful, we will need to increase the cost of our LTD insurance, but not significantly. We are also providing life insurance coverage to 748 employees, 132 dependents, and 12 retirees. Presently the maximum benefit is \$150,000 (paid out at twice one's salary). We are hopeful that this limit will be increased to \$200,000 with no increase in premium. Finally, we are looking at self-insuring our Dental Plan which provides coverage to 578 employees and 188 dependents.

**Ministerial Assistance** - Even in the best of times, individuals face extraordinarily expenses. We are fortunately to have endowment funds available to meet the needs of our working and retired ministers (and their families) as well as more limited funds to assist non-ministerial staff. For instance, we were able to provide \$350 grant to assist ministers with fuel costs. In February, we awarded \$100,000 to 57 newer ministers to assist with their outstanding student loans. Our grants of \$100,000 (raised through the Living Tradition Fund) amounts to 3.6% of the \$2.8 million owed by these ministers.