

LREDA/UUMA/UUMN TASK FORCE FOR EXCELLENCE IN SHARED MINISTRY

Final Report to:

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CHARTER

The LREDA/UUMA/UUMN Task Force was envisioned by the Presidents of LREDA and UUMN (Sarah Dan Jones and Natalie Fenimore) and the Executive Director of the UUMA (Don Southworth) as a way for our professional organizations to work together to identify best practices and recommend training opportunities (new and existing) to nurture excellence in ministry. The UUA, through an Association Sunday grant, gave \$10,000 to fund this team and the professional organizations will be contributing funds to support their work as well.

CHARGE

The Task Force charge was to meet and communicate with key leaders/members of our professional organizations so they could:

1. identify our most urgent shared professional development needs;
2. identify best practices and models for team learning and excellence;
3. recommend best practices, learning opportunities and other strategies to nurture and sustain excellence in professional ministry.

Qualifications and time commitment for Task Force members:

- ✓ Respected among colleagues
- ✓ Credentialed or fellowshipped
- ✓ Ability to work with groups including via conference calls
- ✓ Demonstrated ability to apply the work of anti-racism, anti-oppression and multiculturalism to all facets of their work
- ✓ Able to travel to at least one professional conference and GA in the next year

TIMELINE

January 2012
Association Sunday Funding received

March 2012
Task Force Named

April 2012
First Task Force meeting convened (tele/video)

July 2012
UUMN Annual Conference
Tulsa, OK

October 2012
LREDA Fall Conference
Williamsburg, VA

January 2013
UUMA Institute for Excellence in Ministry
St. Pete Beach, FL

February 2013
Face-to-Face Task Force Working Group
St. Pete Beach, FL

February 2013
Draft Report to Board Presidents

March 2013
Final Report due to Board Presidents and Board Members

June 2013
Presentation at UUMA Professional Ministry Day and LREDA Professional Day
of General Assembly
Louisville, KY

July 2013
Presentation at UUMN Annual Conference
Dallas, TX

Task Force Creation

This Task Force was intentionally created by the leaders of three professional organizations for religious educators, ministers, and musicians.

The work of the Task Force is in no small part a continuation of our Association's tradition of professional development and learning. Many staff, volunteer leaders, and others have devoted much time, attention, and passion to nurturing and advancing what we experience as an evolving understanding of excellence in ministry...excellence in faith.

Preparation

Several resources provided essential framing to the work of this Task Force. To name a few:

- ♦ March 2011/**Strategic Review of Professional Ministries**: An exploration of the past, present, challenges and opportunities for our Unitarian Universalist ministries, with sixty recommendations to consider
- ♦ April 2011/**Strategic Plan for Professional Ministries**: Final report from the Strategic Review of Professional Ministries Task Force to UUA President Peter Morales
- ♦ June 2010/**What Shared Ministry Really Means**: White Paper/General Assembly Workshop presented by: Don Southworth, Anne Bancroft, Keith Arnold and Craig Williamson
- ♦ February 2008/**Futures Report** to the UUA Panel on Theological Education by the LREDA R.E. Education Futures Committee
- ♦ December 2008/**A Tyranny of Excellence** at the Unitarian Universalist Association Ministry Council, by Daniel Aleshire, Association of Theological Schools
- ♦ **Rivals or a Team? Clergy-Musician Relationships in the Twenty-First Century**, by Eileen Guenther; MorningStar Music Publishers, Inc., Copyright 2012

Research/Data Collection

With firm grounding in this cumulative body of work, the Task Force created a workshop framework to be offered at each of the organization's professional conference. While some adaptations were made based on timing and context, the approach was the same. The goals of

the workshop were to invite reflection, conversation, and sharing relating to the factors impacting Excellence in Shared Ministry with the method of facilitating a three-part conversation:

- 1) excellence in collaboration,
- 2) obstacles to collaboration,
- 3) brainstorm on our most urgent professional development needs.

Task force representatives approached each respective conference with humility and preparation, while anticipating any known sensitivities to the subject matter. Four out of the six Task Force members planned and co-facilitated each of the workshops, depending on the professional conference:

UUMN (July 2012): Karen Bauman, Gail Carey, Anne Principe, Wendy Williams
LREDA (October 2012): Gail Carey, Evan Keely, Anne Principe, Annie Scott
UUMA (January 2013): Karen Bauman, Evan Keely, Annie Scott, Wendy Williams

Each of these collegial conversations was framed in a worshipful context. After the charter and charge of the Task Force were put forth, participants were invited into a process of appreciative inquiry to consider experiences in which they were part of an effective staff team. In small groups when numbers of participants allowed for this, attendees shared highlights and generated lists of attributes that contributed to the success of that experience. A Task Force member then facilitated an all-group sharing of attributes, creating a cumulative document. Likewise, participants were invited to individually reflect on an experience in which there were obstacles to effective team functioning and collaboration. In small groups, participants shared key factors of that experience. A Task Force member then facilitated an all-group sharing of these obstacles to collaboration and created a comparable cumulative document.

While each conference took on its own flavor, the cumulative data indicated the most re-occurring dynamics in team collaboration. These findings were, in part, the basis for our shared process of creating this document.

Participation at each conference was voluntary. Concurrent programming and overall conference structure varied

UUMN Workshop Attendance = 26, plus four Task Force members
LREDA Workshop Attendance = 20, plus four Task Force members
UUMA Workshop Attendance = 4, plus four Task Force members

The Task Force and/or the co-chairs also had the formal opportunity to meet with:

LREDA Board
UUMA Board
UUMA Center Staff
Ministries and Faith Development Staff Team

UUMN Board
and several informally-planned conversations with other key Association
leaders

Collaborative Integration of Data and Research

Integrative conversations and document drafting took place in the following ways:

- bi-weekly check-ins via co-chairs
- full task force monthly meetings via conference call, hosted by co-chairs on 7/5/12, 9/22/12, 10/27/12, 11/24/12, 12/22/12, 2/24/13
- full task force “face to face” work-group on 2/1/13 and 2/2/13

PREAMBLE

The best we can hope for our religion is that the future we co-create is rooted in our heretical heritage. We stand on the shoulders of people who, against mandates of their day, promoted counter-cultural ideas. “Freedom, reason, and tolerance,” resounded from their lips and their living, though their world was steeped in proscription and intolerance. Still, we must acknowledge that while this is our foundation, it is not our current battle. Tolerance and freedom are touted widely in popular culture. Quests of the individual (See me. Accept me. Make room for me.) fail to address the desperate isolation in which we all live.

Our faith currently offers a vital alternative. Without the dictates of dogma, we are freed to create the substantive covenantal communities in which people can recover a sense of connection to self, others and spirit. Ours is the religion that binds us first to the other and in doing so to all that is holy or life itself. We can hold each other. We can love each other because of who we are not in spite of who we are. We can love each other into being more.

That lofty, but attainable goal, requires living into reality the notion that our religion is at its core about transformation. Engagement with this faith, true engagement, means that we will be changed by it. Thus, our religious professionals are agents of transformation. As such, we are called upon to be modelers and guides of the spirits, rather than technicians of separate aspects of our religion. We are called to lead and to do so in relationship. We are called to model covenantal living and shared empowerment.

A CONSENSUS OF WORKING DEFINITIONS

Throughout the process, Task Force members continually examined key words used in this ongoing body of examination. So that the framing of the Task Force report would be received in a specific context, the Task Force members identified key terms that would inform the report.

Shared/Ministry

Ministry is serving our congregations and bringing out the best in one another.

Shared Ministry is the net result of religious professional collaboration. It is religious leaders working together as agents of transformation in shared service.

Excellence

Excellence transcends. As professional religious leaders we are called to excellence so that we may lead ourselves and each other toward something holy, something of abiding worth, something that merits humanity's enduring loyalty and love.

Collaboration

Collaboration is coming to rely upon each other's expertise and experience--within a shared mission-based goal. It calls for shared decision making based on expertise and experience. Collaboration can happen in a just hierarchical structure of leadership.

Hierarchy

Hierarchy is the structure of communication, authority, responsibility, and accountability. It is important to note that this is in contrast to common misconceptions of democracy and consensus in congregations. Thus, clarity of roles and levels of authority need attention and specific description at the outset.

Mutual Empowerment

Mutual empowerment is the relational art and skill of bringing out the best leadership qualities in each other in the service of our faith. For team leaders, this requires the knowledge of how to be collegial within a supervisory relationship. It beckons for shared decision making based on expertise and experience, for collaboration. For all religious professionals, this requires mindful attention to one's relationship to power.

OVERVIEW OF OBSERVATIONS AND EXPERIENCES

The work of the Task Force is a continuation of our Association's tradition of professional development and learning. Many staff, volunteer leaders, and countless others have devoted much time, attention, and passion to nurturing and advancing what we experience as an evolving understanding of a lived faith through compelling ministries.

Why are we doing this work? We are listening for what new thing Spirit is calling us to do as a people of faith. "We are building a new way, feeling stronger every day." We are building upon strengths and healthy trends in our religious life, and seeking to encourage them in an intentional way. We recognize the pain that has been caused for religious professionals, and for the congregations they serve, when relationships among ministers, religious educators and musicians have not been respectful and supportive. There are relationships of authority and accountability among us and with the people we serve. Against an historical backdrop of power-over, oppression, and ignorance, we encourage a rigorous re-examination and re-formulation of relationships that are respected, tended, and framed in a spirit of justice as well as in the shared goal of mutual support. This requires being mindful of the use of formal and informal power and an acute awareness of power dynamics.

In shared ministry, we work together to bring out the best in one another. For professionals, an abundantly life-giving shared ministry is covenantal, contextual, and developmental. These are attributes that are discernible in any particular aspect of a healthy, collegial relationship. They are not three distinct characteristics, though in some cases it may be more self-evident how a particular aspect bears one of the three attributes. Inherent in our shared ministry is mutual accountability – to one another as colleagues; to the people and organizations/communities we serve, to the Sacred. Our linked ministries are interdependent and are framed within and guided by a shared mission.

Through the many interactions and conversations that were engaged or initiated by the Task Force, we came to focus on relationship and belonging. We began to ask the questions aloud: *Are our separate discipline organizations in covenant with each other to lead the needed change? Are our staff teams out of covenant? Can we talk about power? What does excellence mean for a struggling small church fighting against closure? What does it mean to truly collaborate? Are the terms collaborate and supervise mutually exclusive?*

Recognizing the importance of relationship to excellence in ministry, covenant became central to our discussions. Unitarian Universalism possesses the byline: ***we are a covenantal, not creedal, religion.*** This means that by this definition, staff teams are compelled to have not only a written covenant, but a covenantal understanding of the relationships of the people on the

staff team, to one another, and to the congregation. Aspects of the covenant should point explicitly to several important realities:

- ***We are serving communities of faith***
- ***Each professional on a staff team has a unique ministry***
- ***We are gifted in our service and are called to serve***
- ***Each of us is learning and growing***
- ***Clear and frequent communication is a necessity, and a blessing***
- ***We develop trust in one another when there is role clarity and we understand that we do not serve in isolation***
- ***We share a common mission***

With “sacred collaboration” emerging as the cornerstone to this charge, we came to more closely examine the covenantal, contextual, and developmental aspects of shared ministry.

As agents of spiritual transformation, we religious professionals lead in relationship. Ours is a covenantal relationship in that it calls us to walk together and work together in humility with a sense of call, with respect for one another's human dignity, with humor, courage, and a sense of adventure and of the possible.

Our work together is contextual in that it necessitates clearly stated expectations, a clear, consistent and fair structure of leadership and accountability (i.e., supervisory relationships and assessment processes). Within this just structure, decision making can be shared with respect to expertise and experience. Mutual empowerment is possible.

Shared ministry is also developmental in that it requires training and education to build and maintain expertise. Continuing education provides avenues for team building and an evolution of roles. This is essential to keeping our professional teams dynamic and vibrant. This need necessitates access to (and in some cases, new development of) resources. As many religious education professionals and music leaders are part-time employees without benefit packages, this also requires attention to resource distribution

Our recommendations for best practices and professional development focus on the possibility for mutual empowerment. We point to new trends that can bring our disciplines into greater alignment and empowerment with each other. We reach for deeper relationship that is marked for greater understanding and mutual accountability. We propose recommendations that might allow for staff to serve together and be agents of transformation.

BEST PRACTICES FOR RELIGIOUS PROFESSIONALS

1. All religious professionals are held accountable to:

- a. a professional code of ethics via requirement to join and participate in respective professional organization
- b. each other via required participation in regular staff team meetings
- c. the congregation via clear leadership/supervisory protocol
- d. the Holy via shared rituals as an integral part of staff team meetings

2. All religious professionals work within an organizational structure that allows for:

- a. clear expectations and roles
- b. explicit and transparent definitions and protocols of supervision
- c. decision-making power aligned with mission and based on expertise
- d. the spirit of collaboration
- e. an evolution of roles/professional growth

3. All religious professionals have competencies in the following areas via cross-discipline/joint training:

- a. collegial covenanting
- b. theology, art and practice of collaborative leadership
- c. theology, art and practice of collaborative worship creation
- d. multi-dimensional worship (culture, generation, discipline)
- e. systems theory and adaptive leadership
- f. congregational and staff transitions

4. All religious professional teams covenant together to uphold the shared ministry and the mission of the congregation and faith by honoring:

- a. each staff relationship (with respect and integrity of ministry)
- b. the congregation (through worship, fellowship, shared traditions, and pastoral relationships)
- c. the community (through hospitality, advocacy, and social justice)

IDENTIFICATION OF MOST URGENT SHARED PROFESSIONAL DEVELOPMENT NEEDS AND MODELS FOR TEAM LEARNING AND EXCELLENCE

Supervision/Collaborative Leadership

Ministers are increasingly expected to supervise and lead staff. We support this trend for the clarity it brings to organizational structures. For ministers (and other staff supervisors), this trend necessitates attention and intention to use of power and training in collaboration as a supervisor. The musicians and religious educators who often supervise staff and interns (in our larger churches) are also called to this task. Members of staff teams need to, in turn, be skilled and mindful of the supervisory relationship and their relationship to power. Two training needs are identified:

1.) SUPERVISION TRAINING for Supervisors / Heads of Staff

The Alban Institute course on supervision (currently taught by Susan Beaumont) has been touted as an excellent source for supervisory training. We recommend that this resource be fully utilized in its current form. More importantly, given the quantitative implications and impact of this urgent need, it is recommended that a Training of Trainers for Supervision Training be developed and offered within our Association immediately. In this way, this formal training would be immediate and accessible as well as a level of competency in this skill area defined.

2.) COLLABORATIVE LEADERSHIP TRAINING for Staff Teams

As we have found no existing model, we recommend our association consider devising its own curriculum for a team-centered learning course on Collaborative Staff Team Leadership.

We recommend this training be offered to staff teams and include such subject areas as:

- 1.) staff team covenanting
- 2.) professional profile
to include a process for individual writing and team sharing of:
 - a. communication style and needs
 - b. personality type and work-style
- 3.) supervisory relationships
 - a. use of power
 - b. how to be colleagues within a power differential
- 4.) role clarity/ boundary definitions
- 5.) shared understanding of "collaboration"
- 6.) decision making authority based on expertise and experience
- 7.) tools for inter-staff conflict resolution
- 8.) mission-driven collaboration

RECOMMENDED LEARNING OPPORTUNITIES TO SUSTAIN EXCELLENCE IN PROFESSIONAL MINISTRY

In addition to the most urgent professional development needs, we recommend several learning opportunities that might promote greater excellence in professional ministry. These would include opportunities for: 1) joint professional training and 2) cross-discipline training.

Joint Professional Development Trainings

- ★ Collaborative Multi-Dimensional Worship
- ★ Joint Good Officer Training
- ★ Interim Leadership Training
- ★ Congregational and Staff Transitions
- ★ Theme-Based Ministry
- ★ Systems Theory and Adaptive Leadership

Cross-Discipline Training in our Ministries

All three professional groups should have a clear understanding of the inherent and explicit ministry of each discipline. Whether we are talking about parish ministry, music ministry or faith formation ministry, we are compelled to examine all possible ways to mutually support each other in serving our joint mission and growing our faith.

With collaboration as the pathway to vibrant shared ministry, cross-discipline training can help us better understand the unique contributions and needs of each discipline.

What is needed in the process of music worship planning to preserve the integrity of an anthem in its worshipful delivery?

What if all worship were sensitive to multi-generational needs?

How do we help all religious professionals find a strong UU identity and a deeper theological grounding?

Where is the ministry in all that we do?

Cross-discipline training is our path to common language and mutual understanding within our shared service. All available means of engagement can/should be considered.

RECOMMENDED IMPLEMENTATION

Professional Organizations

- 1.) Promote and post final report on websites for all three professional organizations.
- 2.) Promote best practices and professional development recommendations made by LREDA/ UUMA/ UUMN Task Force. Consider a joint professional association covenant to hold our organizations accountable to each other.
- 3.) Promote cross-discipline attendance at each other's annual conferences.
- 4.) Establish a Best Practices Implementation Task Force with representatives from the three professional organizations.

General Assembly Program Development Committee

Wherever possible and appropriate, promote and advance shared ministry worship leadership and workshop presentation teams at General Assembly by including a professional from each discipline.

Ministries and Faith Development

- 1.) Fund and establish professional music leadership position/s for resource and ministry development.
 - Reinforce engagement with music leaders around “the music of our future.” Consider the needed role of choirs in supporting the mission of our church. Consider the role composers might play in anthems that invite greater congregational participation. Consider the collaborative needs of our next UU hymnal.
- 2.) Ministerial Fellowship Committee to advocate for seminary coursework and/or standardized mandatory training in administration and personnel issues.
- 3.) Develop Collaborative Team Training model and resources, to be incorporated into credentialing programs and/or offered on district/regional levels.

- 4.) Define standards of core competencies for music leaders and religious professionals (through credentialing programs).
- 5.) Promote a “Stages of Formation” resource for each discipline. Model this after the existing document for religious educators that shows a progression of expectations for a supervisor and competencies.
(See Stages of Formation for Credentialed Religious Educators, revised December 2010, http://www.uua.org/documents/recc/stages_formation.pdf).
- 6.) Design and implement advanced training model in collaborative multi-dimensional worship planning. Consider an application process. Promote in-vivo learning with mentors in a lab space.

District/Regional

- 1.) Build on the annual Worship Arts Festival on the district/ regional level as a model of team learning and worship celebration.
- 2.) Promote a focus on collaboration and power differentials as part of Staff Start-Up Programs.
- 3.) Consider standards for resource development for congregational lay leadership to support the trends of collaborative leadership.

Congregational

- 1.) Involve, include, and promote all three disciplines (including religious education) in community worship, in shared spiritual practices and leadership teams.
- 2.) Include all religious professionals within major rituals of the church (i.e. rites of passage, ordinations, multi-generational worship).
- 3.) Promote de facto congregational funding for professional organization membership.

CLOSING

This Task Force was intentionally created by the leaders of three professional organizations for religious educators, ministers, and musicians. When the six members came together, the essential quality of Task Force vision began to manifest – that is, sacred collaboration. This is honorable work and the members of this chartered group have indeed been proud to serve in this holy task.