

October 3, 2019

Dear ones,

The Interim Report based on September's visit has been reviewed and reformatted and attached to this article.

The input was gathered in the following ways:

Board of Trustees Weekend Retreat

Day Long Staff Start-up

Elected Leaders Retreat - Friday evening, September 6; all day, Saturday, September 7

After service forum on September 8 with approximately 100 members and friends attending

Meeting with Covenant Group Leaders

Three "Brown Bag" sessions involving approximately 30 participants

Meeting with Membership Engagement Council

Several extended e-mail responses

Meetings requested by individual congregants

Invitations to Brown Bag groups and to contact me directly appeared in newsletters and were announced at the September newsletters and announced at the September meeting.

Every response may not be represented here, though I did make a concerted effort to include them all, at least thematically. I identified nine areas of strength which are labeled "Assets" in the report. For each asset, I identified challenges. These are based on clusters of responses which, not addressed intentionally either individually or institutionally or culturally, will, over time, diminish the asset. For each set of challenges, I suggested some possible strategies - many of them involving education, self reflection, policy change or creating formal and informal structures. This part of the report will be fleshed out in greater detail as we, you, I, the Staff and Transition and Leadership, consider priorities and planning for the rest of the interim time. If there are some that I missed, we will add them. And finally, I attached each of these pieces to one of the five Interim Tasks.

I am being as transparent in this process as I can while respecting confidentiality and relating to both the impact of history and the need and desire to move forward in a healthy and life giving way.

During my October visit, there will be three Brown Bag sessions (see schedule), opportunities for casual conversation, meetings of many kinds and Sunday services, where your questions will be heard and honored. Here is what I ask:

Read the whole report. Engage it with an open mind and an open heart. This means engaging your interest and your curiosity and suspending judgment and resisting reactivity. Try not to react or draw or share conclusions for at least 24 hours. Read it again. Write down your questions. When you decide to talk about it with others, try to begin at least two sentences with, "I wonder..."

Consider this a gift from me to you. Hold it gently and when I am with you, let's consider its value as a basis for a new beginning. Everything changes.

In love and gratitude,

Karen

PS - Plan to attend the Beyond Categorical Thinking worship and Workshop on October 12. There will be much there that could inform our journey together.

UCE Core Assets	Challenges	Strategies	Interim Task
<p>1. Core of dedicated and resilient leaders—This was evident in the overall and earnest participation in the Board Retreat and the Elected Leaders Retreat. There was a ready understanding of the value of the Interim Process and a willingness to engage. The diversity of ages and experience in the leadership core speaks to the potential for growth. Discussions were candid and constructive.</p>	<ul style="list-style-type: none"> • Need for an intentional approach for succession planning and leadership development. • Need for clarity of Pathways to Leadership. 	<ul style="list-style-type: none"> • Re-invigorate the leadership development team and charge them to create a leadership development plan. • Workshop to develop plans and tools. • Use regional UUA resources. 	<ul style="list-style-type: none"> • Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition.
<p>2. Persistence of loyal members through transition, disappointment and personal hurt. Many of the people who attended the Small Group Question sessions as well as some of the leadership reported continued involvement in UCE in spite of disappointments, personal hurts and frustrations related to professional leadership of ministers and staff. Others were concerned about particular theological orientations of ministers and other members. Some had taken some time away and returned because they value the sense of community and/or the social justice initiatives undertaken at UCE. They cared enough to show up and share their concerns.</p>	<ul style="list-style-type: none"> • Unresolved hurts based upon both personal experience and reported experience of others. • Compromised trust by individuals based upon unclear expectations of ministers and others. • Unclear or unshared understanding of theological diversity as part of Unitarian Universalist identity. • Lack of articulated shared vision and purpose that transcends personal relationships. 	<ul style="list-style-type: none"> • Appropriate and relevant information relative to departures of ministers. • Healing circles or individual, appropriate pastoral care. • Ritual of release and renewal. • Processing behavior of ministers and congregants through the lens of transition. • Clarification of the roles and expectations of ministers. • Review and claiming of past ministerial legacies. • An overall move toward forgiveness and accessing the healing resource that is the life giving spirit of religious community. • Intentional review and application of Covenant of Engagement for congregation, ministers, and staff. Integrate the Covenant of Engagement into congregational identity. • Creation of policies and structures that ensure safety. • Sermons and classes which emphasize the pluralist nature of our faith tradition. • Instate post-sermon conversations about content related to our mission, who we are, and why we are here. 	<ul style="list-style-type: none"> • Claiming and honoring the past and engaging and honoring its griefs and conflicts.
<p>3. Enduring tradition of quality music and worship—In spite of other concerns about ministers, expectation and appreciation of excellence in preaching and music remains core for many.</p>	<p>No Challenges Noted</p>		
<p>4. Awareness of the value and importance of programming and inclusion of children and youth. In spite of some unevenness in this area the issues around this aspect of congregational life remains alive and moving to the forefront.</p>	<ul style="list-style-type: none"> • Need for a congregational review and refresh of the RE Program. • Need to support and retain stable professional Religious Education staff. 	<ul style="list-style-type: none"> • Saturday morning workshop for parents with activities for children and childcare to reimagine UCE religious education. • Work with Nancy Coombs-Morgan of the MidAmerica region. • More money and support staff. 	<ul style="list-style-type: none"> • Proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.
<p>5. Strong and visible commitment to social justice reflected in a wide range and variety of ways to be involved and serve the wider community.</p>	<ul style="list-style-type: none"> • The perception that Social Justice efforts are too scattered and that a greater impact would be possible with more focus. • The perception that more focus would cause division. • Need to articulate a shared vision. 	<ul style="list-style-type: none"> • Social Justice mapping to find clusters of involvement within and outside the congregation that might lead to a possible focus. • Celebration and recognition of members' efforts toward justice and equity. 	<ul style="list-style-type: none"> • Recognizing the UCE's unique identity and its strengths, needs, and challenges.

UCE Core Assets	Challenges	Strategies	Interim Task
<p>6. Commitment to Policy Governance—Although this is a fairly recent change to the governance of UCE, there is a growing understanding of its potential value and function at the Board and Staff levels.</p>	<ul style="list-style-type: none"> • Clearer attention to balancing the need for action with congregational involvement, valuable programs, and outreach of UCE. • Unclear relationship to mission and ends statements as a source of institutional authority. • Unclear process for involving and informing congregation about decisions that affect them. • Understood and well communicated common sense of what the congregation is trying to do together beyond the particulars. • Lack of institutional priorities with mission as criteria. • Process for creating, reviewing, and evaluating ends statements. 	<ul style="list-style-type: none"> • Intentional continuing education of congregation, leaders, and staff about the theory and practice of Policy Governance. • Increased communication and involvement of congregation in vetting policies and changes before they are voted on. • Renewed vision of the process and practice of democracy as a principle of Unitarian Universalist faith. • Increased clarity about the congregation's role. Emphasis upon being informed and being accountable. 	<ul style="list-style-type: none"> • Recognizing the UCE's unique identity and its strengths, needs, and challenges.
<p>7. Existence of easily articulated Mission Statement and Ends Statements which express the ideals of the community and Unitarian Universalist Principles, which could serve as a basis for reinforcing community standards and setting community priorities for use of congregational resources.</p>	<ul style="list-style-type: none"> • When asked to articulate Mission and Ends Statements, responses were sketchy at best. Without intention, it is difficult for such statements to inform the work of the congregation or its leadership. 	<ul style="list-style-type: none"> • Discussion topic for small groups. • After church information session. • Information in the newsletter. • Board workshop to review, evaluate and/or deepen commitment to mission and ends statements and bring them to life in the governance of UCE. • Provide Ends Statements study groups. • Encourage committees to talk annually about their relationship to UCE's mission or Ends statements and share with the board. 	<ul style="list-style-type: none"> • Proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.
<p>8. Existence of a Relational Covenant and Congregational Relations Team in place as standards for behavior in UCE congregational life. This is a valuable resource that many in our discussions felt was underutilized as reflected in cultural patterns of communication, reactions to change, conflict and disappointment.</p>	<ul style="list-style-type: none"> • Conflict ambivalence/difficulty in addressing differences with civility. • Lack of intention or understanding around Covenant of Engagement. • Inability or unwillingness to address patterns of uncivil communication. • Reactivity to strongly expressed needs or opinions—“squeaky wheels” driving decision. • Willingness to accept and share superficial/partial stories that attribute motivations to others. • Desire to maintain the positive legacies of past ministers and to extend the exemplary and lasting contribution of the ministers. • Divisive rhetoric relative to social justice. • Congregation of divides. • Incomplete integration of change. • Awareness of the part that the congregational culture has played in conflicts with ministers (shared responsibility). • Awkward patterns of communication between congregation and staff indicating uncertainty about roles, responsibilities, and boundaries. 	<ul style="list-style-type: none"> • Addressed by education and practice. • Guided review of Relational Covenant for all UCE groups and meetings • Adult Education offerings on: Crucial Accountability, Compassionate Communication, Transition, and Civil Discourse. • Support the Congregational Relations Team (CRT) to help to resolve past grievances. 	<ul style="list-style-type: none"> • Recognizing the UCE's unique identity and its strengths, needs, and challenges. • Claiming and honoring the past and engaging and honoring its griefs and conflicts.
<p>9. A strong and committed professional support staff.</p>	<ul style="list-style-type: none"> • Uneven staff appreciation. • Unclear expectation of staff roles, responsibilities, and lines of authority. 	<ul style="list-style-type: none"> • Establish and publicize a clear organizational chart that is easily accessed. • Publicize a directory of “Who to Contact about What.” • Have a semi-annual congregational staff appreciation event. • Publish regular and updated staff roles and responsibilities. 	<ul style="list-style-type: none"> • Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition.
<p>10. A core of dedicated volunteers who show up to support the ongoing and special programming of the church.</p>	<ul style="list-style-type: none"> • Uneven volunteer appreciation. • Lack of clarity about how to get involved. 	<ul style="list-style-type: none"> • Have annual volunteer appreciation rituals and events. • Volunteer Fairs. • Sunday Q & A booth about volunteer opportunities. • Thank each other. 	<ul style="list-style-type: none"> • Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition.

UCE has a number of Core Assets.

1. **Core of dedicated and resilient leaders. This was evident in the overall and earnest participation in the Board Retreat and the Elected Leaders Retreat. There was a ready understanding of the value of the Interim Process and a willingness to engage. The diversity of ages and experience in the leadership core speaks to the potential for growth. Discussions were candid and constructive.**

Challenges:

Need for an intentional approach for succession planning and leadership development.

Need for clarity of Pathways to Leadership.

Strategies:

Reinvigorate the leadership development team and charge them to create a leadership development plan.

Workshop to develop plans and tools.

Use regional UUA resources.

Interim Task:

Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition

2. **Persistence of members loyal through transition, disappointment and personal hurt. Many of the people who attended the Small Group Question sessions as well as some of the leadership reported continued involvement in UCE in spite of disappointments, personal hurts and frustrations related to professional leadership of ministers and staff. Others were concerned about particular theological orientations of ministers and other members. Some had taken some time away and returned because they value the sense of community and /or the social justice initiatives undertaken at UCE. They cared enough to show up and share their concerns.**

Challenges:

Unresolved hurts based upon both personal experience and reported experience of others.

Compromised trust by individuals based upon unclear expectations of ministers and others.

Unclear or unshared understanding of theological diversity as part of Unitarian Universalist identity.

Lack of articulated shared vision and purpose that transcends personal relationships.

Strategies:

Appropriate and relevant Information relative to departures of ministers.

Healing circles or individual, appropriate pastoral care.

Ritual of release and renewal.

Processing behavior of ministers and congregants through the lens of transition.

Clarification of the roles and expectations of ministers.

Review and claiming of past ministerial legacies.

An overall move toward forgiveness and accessing the healing resource that is the life giving spirit of religious community.

Intentional review and application of Covenant of Engagement for congregation, ministers and staff. Integrate the Covenant of Engagement into congregational identity.

Creation of policies and structures that ensure safety.

Sermons and classes which emphasize the pluralist nature of our faith tradition.

Instate post-sermon conversations about content related to our mission, who we are, and why we are here.

Interim Task:

-Claiming and honoring the past and engaging and honoring its griefs and conflicts

3. Enduring tradition of quality music and worship - In spite of other concerns about ministers, expectation and appreciation of excellence in preaching and music remains core for many.

No challenges noted

4. Awareness of the value and importance of programing and inclusion of children and youth. In spite of some unevenness in this area the issues around this aspect of congregational life remains alive and moving to the forefront.

Challenges:

Need for a congregational review and refresh of the RE Program.

Need to support and retain stable professional Religious Education staff

Strategies:

Saturday morning workshop for parents with activities for children and childcare to reimagine UCE religious education.

Work with Nancy Coombs-Morgan of the MidAmerica region.

More money and support staff.

Interim Task:

Proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

5. Strong and visible commitment to social justice reflected in a wide range and variety of ways to be involved and serve the wider community.

Challenges:

The perception that Social Justice efforts are too scattered and that a greater impact would be possible with more focus.

The perception that more focus would cause division.

Need to articulate a shared vision.

Strategies:

Social justice mapping to find clusters of involvement within and outside the congregation that might lead to a possible focus.

Celebration and recognition of members' efforts toward justice and equity.

Interim task:

Recognizing the UCE's unique identity and its strengths, needs, and challenges

6. Commitment to Policy Governance - Although this is a fairly recent change to the governance of UCE, there is a growing understanding of its potential value and function at the Board and Staff levels.

Challenges:

Clearer attention to balancing the need for action with congregational involvement

Valuable programs and outreach of UCE.

Unclear relationship to mission and ends statements as a source of institutional authority.

Unclear about process for involving and informing congregation about decisions that affect them.

Understood and well communicated common sense of what the congregation is trying to do together beyond the particulars.

Lack of Institutional priorities with mission as criteria.

Process for creating, reviewing and evaluating ends statements.

Strategies:

Intentional continuing education of congregation, leaders and staff about the theory and practice of Policy Governance.

Increased communication and involvement of congregation in vetting policies and changes before they are voted on.

Renewed vision of the process and practice of democracy as a principle of Unitarian Universalist faith.

Increased clarity about the congregation's role. Emphasis upon being informed and being accountable.

Interim Task:

Recognizing the UCE's unique identity and its strengths, needs, and challenges

7. Existence of easily articulated Mission Statement and Ends Statements which express the ideals of the community and Unitarian Universalist Principles, which could serve as a basis for reinforcing community standards and setting community priorities for use of congregational resources.

Challenges:

When asked to articulate Mission and Ends Statements, responses were sketchy at best. Without intention, it is difficult for such statements to inform the work of the congregation or its leadership.

Strategies:

Discussion topic for small groups.

After church information session.

Information in newsletter.

Board workshop to review, evaluate and/or deepen commitment to mission and ends and bring them to life in the governance of UCE.

Provide Ends Statements study groups.

Encourage committees to talk annually about their relationship to UCE's mission or Ends Statements and share with the board.

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Proudly coming into possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

8. Existence of a Relational Covenant and Congregational Relations Team in place as standards for behavior in UCE congregational life. This is a valuable resource that many in our discussions felt was underutilized as reflected in cultural patterns of communication, reactions to change, conflict and disappointment

Challenges:

Conflict ambivalence/ difficulty in addressing differences with civility

Lack of intention or understanding around Covenant of Engagement

Inability or unwillingness to address patterns of uncivil communication

Reactivity to strongly expressed needs or opinions -“squeaky wheels” driving decisions

Willingness to accept and share superficial/partial stories that attribute motivations to others.

Desire to maintain the positive legacies of past ministers and to extend the exemplary and lasting contribution of the ministers

Divisive rhetoric relative to social justice

Congregation of divides

Incomplete integration of change

Awareness of the part that the congregational culture has played in conflicts with ministers (shared responsibility)

Awkward patterns of communication between congregation and staff indicating unclarity about roles, responsibilities and boundaries

Strategies:

Addressed by education and practice:

Guided review of Relational Covenant for all UCE groups and meetings

Adult Education offerings on: Crucial Accountability, Compassionate Communication, Transition, and Civil Discourse.

Support the Congregational Relations Team (CRT) to help to resolve past grievances.

Interim Tasks:

Recognizing the UCE's unique identity and its strengths, needs, and challenges.

Claiming and honoring the past and engaging and honoring its griefs and conflicts.

9. A strong and committed professional support staff.

Challenges:

Uneven staff appreciation.

Unclear expectation of staff roles, responsibilities and lines of authority.

Strategies:

Establish and publicize a clear organizational chart that is easily accessed.

Publicize a directory of "Who to Contact about What."

Have a semi-annual congregational staff appreciation event.

Publish regular and updated staff roles and responsibilities.

Interim task:

Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition

10. A core of dedicated volunteers who show up to support the ongoing and special programming of the church.

Challenges:

Uneven volunteer appreciation.

Lack of clarity about how to get involved.

Strategies:

Have annual volunteer appreciation rituals and events.

Volunteer fairs.

Sunday Q&A booth about volunteer opportunities.

Thank each other.

Interim task:

Clarifying the appropriate leadership roles of minister(s), church staff, and lay leaders and navigating the shifts in leadership that may accompany times of transition