

Report
of the
Pathways Review Panel
March 2006

Report on the Pathways Rapid Start Large Church

I. Introduction

Purpose and Personnel

The Pathways Review Panel was appointed by President William Sinkford for the purpose of reviewing the Pathways Church Project, which was our association's first effort using a new model to engender rapid growth and lead to a large congregation. The panel was to evaluate what happened and document what was learned. This report is to be presented to the UUA Board at its April 2006 meeting.

Rev. Dr. Stephan Papa served as chairperson of the panel. He is the Senior Minister of the Main Line Unitarian Church in Devon, Pennsylvania. Stephan has been active in our extension efforts for over 25 years including serving as organizer and chairperson of district growth committees in Florida and the Mountain/Desert Districts, and the Philadelphia/Wilmington Metro Growth Planning Committee. With First Universalist in Denver, he sponsored the start of two congregations, and now with the Devon congregation is sponsoring our second large start effort. He is part of the Senior Ministers of Large UU Congregations group, has served on the Ministerial Fellowship Committee and the Fund for a Just Society.

Rev. Nancy Nelson Elsenheimer served on the panel as an outside consultant. She serves as a Growth Consultant with the United Church of Christ, working with new and renewing congregations since 1997. Working closely with associations and conferences, she brings passion and energy for church growth, new worship styles, small group ministries, and building a church which is multi-racial, multi-cultural, open and affirming. She brings Conference and Local Church pastoring experience. Ministers of Evangelism for Local Church Development and Renewal work with conference partners to start new congregations, nurture, and renew local churches. They develop and implement training and resources to encourage and equip United Church of Christ local church members and leaders to plan and organize programs of evangelism, increased worship attendance, membership growth and spiritual development.

The third panel member was Larry Ladd. He served as the UUA's Financial Advisor (one of the three elected officers) from 1997-2005. He was chair of the UUA Audit Committee from 2003-2005, and served on several UUA board appointed committees dealing with finances. He is a member of the UUA President's Council, and a trustee of the Meadville Lombard Theological School. He has served on the Commission on Appraisal, and as treasurer and Investment Committee chair of the Church of the Larger Fellowship. He is a member of our Falmouth, Massachusetts congregation, knowledgeable and committed to our growth as indicated in his annual reports to the General Assembly. He is the National Director of the Higher Education Practice of Grant Thornton, L.L.P., an accounting and consulting firm; his previous position was as the Director of Budget & Financial Planning at Harvard University.

Staff support was provided to the panel by Rev. Stefan M. Jonasson, the UUA Coordinator for Services to Large Congregations. Stefan helped with logistics and research, but did not participate in the interviews, or in the writing of this report.

Process

The panel began in November of 2005 with telephone and email communications. We gathered and read a large number of documents, which are listed in the appendix. We interviewed key participants from January 24-26 in Dallas and January 31-February 1, 2006 in Boston. We met again in February 8-11 to begin writing the report, and have completed the process through email.

In Dallas, we interviewed the Pathways staff starting with Rev. Anthony David, Rev. Christine Tata, Rev. Robert Moore, and Meryl Gunter, Executive Director; we later interviewed Laurie Simmons, the Office Manager/Music Coordinator, on the telephone. In Dallas we also interviewed the Pathways Board of Trustees including Kristin Robertson (President), Larry Pettit, Pete DeKalb, Therese Adamiec, Marcus Miller, and Ron Suiter. We then met with Rev. Dr. Laurel Hallman, Senior Minister of the First Unitarian Church of Dallas, and Michael Ellsberry and Howard McMann of the North Texas Association of Unitarian Universalist Societies. We also interviewed Jennifer Nichols-Payne, SW District Director Lifespan Faith Development, and later spoke on the telephone with other district staff serving during the project including, Rev. Robert Hill, the District Executive during the beginning of the project, and Rev. Anne Odin Heller, District Executive after the congregation was established.

Interviews began with prayer, and a statement of appreciation for their vision and commitment to growing Unitarian Universalism, and the able work they had done with Pathways. We apologized for errors that happened and the difficulty this may have caused them, but assured them of everyone's good intentions. We acknowledged the feelings of disappointment that the project did not develop as hoped, but expressed our view that this was a successful congregational start and a learning experience though it did not meet all the expectations. We explained our goal was not to place blame but to learn. We asked them to share from the beginning their experience and what they learned. We asked questions for clarification throughout the interview. Some gave us written statements; all expressed their appreciation for the panel process.

In Boston, we followed a similar pattern as we interviewed President William Sinkford, Vice-President Kay Montgomery, Rev. Tracey Robinson-Harris, Director of Congregational, District, and Congregational Services, and Rev. Stefan Jonasson.

II. Background

The Pathways project was the result of at least three separate strands of thought and effort over many years starting in the 1990s. There was a great deal of momentum, energy and commitment behind it within the Unitarian Universalist faith community.

One strand was initiated by the Congregational Properties and Loan Commission (CPLC) in the late 1990s, where the members believed that more leadership was needed to start large congregations. Since that task was beyond its charge, the CPLC members asked the administration and board to establish the New Congregations Task Force, which consisted of CPLC members supplemented by other leaders and staff including one minister of a large UU congregation. The New Congregations Task Force report, issued in May 2002, called for the establishment of ten new large UU congregations a year. While many viewed such a radical recommendation as hyperbole, the report did play a key role in the process of “thinking big” at the national level. The concept of “thinking big” continued with the staff-led New Congregations Task Force Implementation Team, which added more detail to the previous report but remained very hopeful and optimistic about starting one, and then many more, large congregations from scratch. These reports were a clear signal from the administration that starting new large congregations was a priority.

A second strand was initiated by the Senior Ministers of Large Congregations, where many conversations occurred, again in the late 1990s, about the perceived decline in the number of large congregations compared to 25 years earlier and about the need to reverse that trend. The Senior Ministers prepared a platform that urged all candidates for UUA officer positions (president, moderator, and financial advisor) to take positions endorsing support for steps to increase the number of large congregations.

A third strand was the most important one, because it made concrete, with a location and with financial resources, the possibility of a large church start. In the mid 1990s, Unitarian Universalist leaders in the Dallas-Fort Worth area began to discuss how to “jump start” the growth of Unitarian Universalist in that area, with a large church start seen as the best immediate engine of growth. The two most prominent and influential such leaders were Hardy Sanders, a visionary leader capable of mobilizing financial resources, and Rev. Laurel Hallman, one of most respected ministers in the denomination. They soon involved other groups, including UUA staff, which resulted in the establishment of a Metroplex Growth Steering Committee in 2000 that represented the UU churches in the area and which recommended, in 2001, a large church start-up in the Dallas Fort Worth area. At around the same time, donors in the Dallas-Forth Worth area indicated interest in providing substantial financial support for such a new start.

Given these three strands, it was clear that the opportunity should be seized to establish a new church start, and to do it in the Dallas-Fort Worth area.

III. Chronology

November 2000: William Sinkford, Director of Congregational, District and Extension Services, calls a meeting of ministers and lay leaders in the Dallas/Fort Worth area to discuss possibilities for growth; organizing and fund raising begins.

April-June 2001: UUA Board appoints members of The New Congregation Formation Task Force, which in its final report of **June 2002** calls for the establishment of ten new large congregations a year.

July 2001: Jonalu Johnstone, District Growth Consultant, is hired as Planning Coordinator.

October 2001: Dallas/Fort Worth Growth Steering Committee develops task forces and plan.

November 2001: Large Church Startup Task Force formed with Dennis Hamilton (chair), Rosemary and Tom Fitch (First Jefferson), Laurel Hallman (First Unitarian), Karen Lewis (First Unitarian), Bob Martin (Plano), Jennifer Nichols-Payne (district staff), Kristin Robertson (First Unitarian), Chet Smith (Plano).

June 2002: The Metro Strategic Plan for Growing UUism is endorsed including its call for a Large Church Startup. The plan says we are, “Convinced that our traditional approach to starting UU churches needs modification.” They call for changes to be implemented in the new start including organizing small group ministries first instead of having worship services, a team of staff, offering ‘seeker services,’ with “marketing targeted to attract a new crop of UUs.” The Large Church Startup Task Force visits large churches in the area, and states their intention to take elements from them and “give them a UU spin.” Initial assumptions imagine attendance of “300 in December 2003 and steady growth to 1,000 in December 2004.” Final Metro Plan Revenue and Expense Projection calls for attendance of 808, membership of 343, and pledge income of \$176,550 by June of 2005. The UUA anticipates being able to raise \$1 million dollars for the project.

September 2002: Metro Large Start Task Force begins search for administrator.

October 2002: Search Committee for Senior Minister begins; it is composed of representatives of the stakeholders: Karri Dawes (young adult), Mike Ellsberry (North Texas Association of UU Societies), Laurel Hallman (First Unitarian), Dennis Hamilton (Large Church Start Up), Stefan Jonasson (UUA), Jennifer Nichols-Payne (District LifeSpan Education Staff), Kristin Robertson (prospective Pathways member).

December 2002: Jonalu Johnstone leaves as Project Planning Coordinator; her final report recommends the position continue; it does not.

January 2003: Metro Large Start Task Force hires Meryl Gunter as Administrator.

January 2003: The *Imaginary Timeline Detailing a Strategy for Organizing the Church...* written by Stefan Jonasson, agreed to by all as the plan to use going forward. It calls for a religious educator to begin working by September 2003, and that by January 2005 there will be 350 adult members, average adult attendance of 600, 140 children registered, and 200 attending. By January 2006 there will be 600 adult members, an average adult attendance of 750, 200 children registered and 250 attending.

March 2003: Anthony David selected as Senior Minister, begins communication planning.

April 2003: Focus group of UUs and non-UUs facilitated by Dr. Susan Gore.

May 2003: Office space leased and Pathways Church name chosen.

May 2003: Search Committee for Religious Education Professional/Family Life Minister begins; it is composed of Karri Dawes (young adult), Anthony David, Bob Hill (District Executive), Karen Lewis (DRE First Dallas), Jennifer Nichols-Payne (District Lifespan RE Director), Kristin Robertson (prospective Pathways leader).

July 2003: Anthony David arrives, land for a new congregation purchased by NTAUUS.

September-November 2003: Anthony leads focus groups called "Pathways Vision 2003".

October 2003: Meryl made Executive Director.

October 2003: Position description for Family Life Director/Minister is posted.

October-November 2003: Anthony and Meryl attend Easum & Bandy Training (specialists in planting new churches), Alban Antiracism Workshop, and Large Church Staff Conference.

October-December 2003: Various public events held to attract people to Pathways; each event attracted between 70-100 people.

December 2003: Position descriptions for Family Life Director/Minister and for Worship/Adult Spiritual Development Minister go up on UUA settlement site.

January 2004: Pathways retreat and launch of four small groups; three are intergenerational.

February 2004: Consulting arrangement made with Thomas Bandy (outside consultants were recommended in the plan).

February 2004: Three precandidating interviews for Family Life position take place; first search for religious education professional fails, a second search commences.

March 2004: Three precandidating interviews for Worship/Adult Spiritual Development minister take place and Christine Tata is hired; Tracey Robinson Harris agrees with this; search continues for Family Life Minister.

May 2004: On site visit from Thomas Bandy; he suggests Pathways hire a staff person to lead a signature ministry in the community rather than a religious education professional.

August 2004: Robert Moore starts as minister for Family Life Ministries including religious education for children and adults.

Summer 2004: Anthony facilitates Focus Groups to develop the DNA (mission, core convictions and values statements).

Summer 2004: Decision to worship with less than 300 made by Anthony, Tracey and Laurel.

August 2004: Planned Big Public Event is cancelled because of illness of speaker; Pathways hosts informational booths at large community events and invites the public to open events such as a pool party; they begin a large marketing campaign (including mailers, newspaper ads and inserts) to attract people to the first public worship.

September 2004: Tom Bandy follow-up consultation; he says members not staff should own the religious education program; he suggests they should delay launching religious education programs until completing a process for members to own them.

September 19, 2004: First public worship, which was intergenerational and with contemporary praise music, had 140 in the building; 27 people join; “outreach offering”, commences (undesignated cash offerings in the plate go to local service organizations).

September 2004: Laurie Simmons hired for music and office duties.

September 2004: William Sinkford and Terry Sweetser come for a coordinating meeting to discuss progress with representatives of the stakeholders: Metro Planning, NTAUUS, Anthony David and Meryl Gunter; they discuss the fact the pace of growth is slower than anticipated.

Fall 2004: Rob Moore facilitates focus groups to develop a vision for religious education programs and recruits leaders for their February launch.

November 2004: President Sinkford, Kay Montgomery, Tracey Robinson-Harris, and Terry Sweetser start regular oversight meetings; they share a concern about the project, but are supportive and hopeful.

December 2004: Pathways has 36 adult members.

February 2005: Religious Education/Family Life Sunday morning programs for children begins; average attendance of children and youth in the programs was 33.

February 2005: Anthony and Meryl meet with Tracey in Boston expressing concern about whether staff (five full-time) should be released because the money is running out, they agree to continue staff as is; there are plans for additional fund raising and for rapid growth.

Spring 2005: Pledge drive raises \$103,000, average Sunday attendance 100, Easter Sunday 177.

May 2005: Pathways has 60 members.

May 2005: Tracey visits and is hopeful about additional money being raised, but says the \$170,000 advance needs to be addressed.

June 2005: \$820,000 (including the \$170,000 advance) has been spent on Pathways at fiscal year end according to UUA reports.

July 2005: Jerry Gabert, UUA Vice President of Finance, sends Pathways a letter asking for promissory note to repay the advanced monies.

September 2005: A second earlier service, called Simple Gifts, is launched; it runs concurrently with religious education for children and youth; it has a more reflective, traditional UU style, with more lay participation, and the same sermon as the SpiritSong fast paced, upbeat contemporary service they pioneered that follows. Average attendance is 30 at Simple Gifts, 70 at SpiritSong; a humanist small group meets separately during the second service; a "Life with God" theist group meets later in the afternoon.

September 2005: Pathways has 71 members.

September 2005: Tracey Robinson-Harris attends Pathways Board Retreat to sort out the \$170,000 money issue; she reminds them the UUA funding would run out by December 31, and additional funding is not forthcoming at this time; dismissing staff is discussed.

September 2005: Approximately \$950,000 has been received by Pathways according to their reports as of the end of the month; salaries were costing \$360,000 a year and rent for office and meeting space were costing approximately \$72,000.

September 2005: Pathways votes to write promissory note; UUA forgives the funds.

Fall 2005: The decision is made to lay off all staff except Anthony; his salary is reduced from \$90,000 to \$60,000. UUA funding will run out by year end, and additional funding is not forthcoming at this time.

December 2005: Pathways returns to one service at 10:00 called Common Ground; religious education classes run concurrently; children, youth, and volunteers attend service once a month.

January 2006: Pathways has 62 members; the board takes on more ownership; recommends selling the land; develops a business plan; Pathways annual pledge amount is \$102,000.

March 2006: Some additional funding has been offered from local donors, and organizations.

June 2006: It is anticipated the UUA will have contributed \$1,050,000 to the project by fiscal year end.

IV. Celebrations

Though the Pathways Rapid Start Large Church did not develop according to expectations, there is much to admire and celebrate (not denigrate). Everyone involved should be affirmed for wanting to grow the numbers of Unitarian Universalists, for wanting to share the faith and increase our influence. The UUA staff should be applauded for their bold vision, and for trying new strategies for growth. The Dallas Fort Worth Metro Area UU leaders should be admired for their gallant collaborative commitment to extending our way in religion. The donors should be thanked for their generosity and trust. Reverend Anthony David, the staff and leaders of Pathways Church should be honored for their courage, creativity, and dedication to developing a liberal religious community for today and tomorrow.

A new and wonderful congregation has been created; they are a caring community, a sanctuary and source of inspiration; they stand up for justice, equality and peace in a place where it is needed; they have capable leaders, and engaged members. They have been willing to try things most of us are afraid to do like experimenting with a new style of worship (with a drummer and lively, contemporary, praise music), having intergenerational services every Sunday, and donating their collections to others every Sunday. And, they have the highest per unit average pledge of any of our congregations (\$2858). They reached out beyond our customary demarcations, and brought in people who are new to our way in religion (somewhere between 50 and 70%). Lives have been made better, transformed; a caring community has been created. We were impressed. They will grow and continue to be a model.

The Pathways Board has developed an excellent business plan, which should be supported and emulated. Pathways Church is not a failure, nor a waste of resources; it has taught us a lot, and everyone involved should be honored and thanked.

V. Lessons

Lessons from Other Denominations

Having an outside consultant on the panel facilitated our learning more about what other denominations are doing to grow, especially the United Church of Christ. We have learned that planting new congregations in the 21st century is not an easy task. In the midst of an un-churched culture, it takes a bold vision and focused resources to draw people together into a faith community, seeking spiritual deepening, striving for justice, building the Beloved Community. The United Church of Christ, and its partner denomination the Christian Church (Disciples of Christ), are in the process of laying out bold visions. The Disciples of Christ has called their vision “a thousand churches a thousand ways”. The United Church of Christ has presented a vision called “Now is the Time: A Kairos Moment” and has challenged itself to start over 1,600 new congregations in the next twenty years. Both visions suggest that there needs to be a variety of models for planting new congregations, which may include (but not be limited to):

- Pioneer/Parachute: Starting from scratch in a new location or for new group
- Adopting/Affiliation: Embracing groups who approach the denomination
- Propagating: Multiplying network of cell groups: 12x12
- Daughtering: Halving off a core group from a parent church
- Satellite: an existing church starts an off-site worship
- Partnering: A cooperative venture between several churches
- Mission developer: A developer goes into an area and starts congregations
- Transplanting: Selling and relocating a church to begin a new church
- Nesting: Hosting a congregation within an existing congregation
- Restart: Take over a new church and start in the same site with new leadership
- Conference/District/National start: begins with initiative from outside target area

Of all of these models, the Pioneer/Parachute, which is what Pathways was, is the most difficult model for success. It usually involves a lot of resources up front and is often a very isolating experience. The United Church of Christ attempted two rapid start congregations in 1997, funding them with National and Conference combined funding of \$180,000 over 2 years. Almost ten years later, one congregation is a solid, medium sized congregation with 200 in worship and owning their own building. The other congregation continues to be a small congregation, never growing into the vision of a large member congregation, or into the land purchased for that vision.

Our typical funding pattern for a new church start is \$60,000 over 5 years from the National Setting, matched by the Conference/Association. This \$120,000 has helped congregations call full time leadership and begin to grow the congregation. As the congregation grows, their stewardship also grows and the amount of Leadership Funding decreases. If there is a large infusion of money in the beginning (\$180,000 over 2 years), one can see that growth needs to quickly replace those resources. If the congregation grows, then they consider purchasing land or a building and financing can be made available. Purchasing land too soon has often proved to be a distraction from growth,

and/or has had the negative effect of burdening the emerging congregation with a crushing debt load.

An ecumenical study partially funded by the Lilly Foundation (2000) examined successful new church starts and found that they utilize the following: a shared vision, the involvement of the laity, asking people to join, laity training, a focus on the un-churched, location in areas of significant growth.

There must be clarity of core values, vision, and the mission of the church. Those core values must address human hopes and hurts. The church must be authentically welcoming and stand for something. There must be intentional outreach/marketing to get the word out about their unique vision. Telephone calls from a list are resented. Many new churches plan a “signature event” in the community establishing identity and relationships with the people they are trying to reach. Advertising must be in strategic places. Personal evangelism is essential.

The study also found the marks of a successful new church pastor: is driven by vision, has a passion for this new church, has willingness to risk, can live with ambiguity, has a strong sense of call, has a strong faith, has a strong devotional life, gives the mission away, equips the people, is always the vision caster, reinvents self as the church grows.

Pastoral leadership which cast the vision and equips the people was far more critical than issues of funding or purchase of land/buildings. Denominations work on the recruiting, assessing, training and coaching of new church planters. They try to have mentoring pastors and congregations, which provides experience and context to the planter. Both pastoral and lay leadership is critical, so is ownership. Many churches start with a leader or a core group of people who want this new church so badly they say they will do it whether there is funding or not. The amount of money put into a new church plant has not been a critical factor in its success.

Jim Griffith, a church plant consultant, (www.Griffithcoaching.com) with whom the UCC have worked, in his list of “The Top Ten Reasons Church Plants Fail” writes: “Starting a new church represents a significant investment of time, energy and resources. Most new church starts don’t survive and become financially viable. There are some common themes which are found in the review of church plants that did not make it. ...the ten most common reasons church plants fail. Lack of a clear definition of ‘success’ and a clear exit strategy. Premature birth (starting public worship too quickly.) Mismatch between the planter and the community/context/target audience. Insufficient assessment (of the planter and the planting context.) Lack of training and coaching. Putting all of your eggs in one basket (depending on one big advertising campaign or event.) Too much overhead too fast. The inability or unwillingness to recruit new people. Lack of focus and ignoring the pressing priorities. Inebriation (being drunk on your own vision.)”

Lessons from the Pathways Rapid Start Large Church

Pathways was an experiment. Usually in an experiment you have one variable with other factors “controlled” so that you can directly link cause and effect. Because this experiment involved so many variables, the specific effect of any particular variable is difficult to ascertain. One panel member has described the various commentaries on Pathways as a Rorschach test, telling more about the commentator’s views than about the Pathways experiment itself.

Because there were so many variables we can say that no single factor determined the course of the project. The panel can not say whether using contemporary praise music brought more new members in or kept more potential members out. Having Intergenerational Services every Sunday had a value, but we don’t know how much. Some parents asked for children’s programs to run during the services so they could attend without their children. We don’t know whether an experienced minister would have managed such a unique start-up any better. We can’t be sure whether Pathways focused on spiritual transformation too much or too little. We can’t even say whether having more or less money would have led to more growth.

We can say that having so many variables, experimenters, and factors made success more of a stretch. Based on our review of data and opinions, we have, identified lessons that we hope inform future growth strategies.

First, the project needed to test fewer ideas at one time. Fewer variables would have allowed a more controlled experiment, where outcomes are linked to specific causes. Having fewer variables also would have improved the likelihood that the project would be managed effectively.

Second, a major project needs one model or approach. Another fundamental reason the project did not meet expectations is because two distinctively different models were being implemented at the same time: the Metro Growth/UUA Imaginary Timeline Plan and the model proposed by Thomas Bandy. Both plans are creative, visionary, and outside of our traditional UU box. The Bandy model is enchanting: it focuses on spiritual transformation and mission as opposed to primarily serving one’s own members and institution. It seems anti-institutional and disparaging of the usual services churches provide like worship and religious education classes for children. Instead it centers on small group ministries, and equipping members for their ministries. The UUA/Metro Plan called for a senior minister for worship and a religious education professional to be hired. It was reaching out for new UUs among the “cultural creatives,” and starting with a large staff, but it was not as far out of the box as the Bandy model. The differences between the two models were not directly resolved. A synthesis may have been possible. Instead, the Pathways leadership was left uneasily in between the models, and not able to focus and follow either completely. It may be suggested that for something to really be an experiment it should be really different; and that doing so may be the only way to get systemic, cataclysmic change. However, the panel believes the unresolved conflict and

trying to go too far outside the box made the experiment unmanageable. It caused confusion in direction and identity, and the isolation of the participants.

Third, Pathways needed a realistic project plan. The plans presented possibilities without enough specifics on how to create them, or what to do when they didn't materialize. All of the plans, the UUA New Congregation Task Force Final Report, the New Congregation Implementation Team Preliminary Strategic Map, the Dallas Fort Worth Metropolitan Strategic Plan, the Imaginary Timeline Detailing a Strategy for Organizing the Church, and the Thomas Bandy Plan were unrealistic. UUA leadership told us the New Congregation Task Force Final Report was a vision not a plan. Subsequent plans were visionary as well. Planners and participants had questions and doubts, but, being hopeful, and not wanting to appear negative; they did not press them. When parts of the plans were not forthcoming, instead of cutting back, participants worked harder, and hoped. This idealism though commendable caused more feelings of failure, hurt, and anger in the end. (The Pathways Board felt betrayed when they were required to let staff go after they remembered being told it wouldn't be necessary.) This pervasive optimism stood in the way of reasonable expectations being developed, and plans being revised based on experience, and hence worked against the success of the project.

Fourth, the Pathways experiment needed focused project management. Most major projects assign responsibility for oversight, communication and coordination to one person or to a small group of people. Responsibilities need to be clearly articulated and based on a realistic schedule. All financial agreements need to be clear, specific, and in writing. The project schedule needs to include points at which the project is evaluated based on experience and revised. An outside financial review of the plans especially as they changed would have been useful, as would individuals to help with the question of how diminishing financial resources could best be used. Check-ins needed to be candid, assessments and communications thorough, so no one was surprised with changes. Frequent onsite visits, face to face communication among the stakeholders, especially at the time of deviations from the original model, would have been beneficial.

Fifth, the project needed to maintain a high degree of connection and communication. Trying to be different from a typical UU congregation led to separation. This isolation led to a lack of reality testing and eventually of support. The project began with a tremendous amount of collaboration, but that active involvement diminished when a minister arrived. This disconnect increased with the addition of staff and members. Their use of policy governance added to the separation between staff and members. Concerns for congregational polity (even though it was not yet an official member congregation) kept even association officials at a relative distance. The Pathways Board and staff said they felt isolated from the UUA that the UUA didn't really know or care about them. The collaboration of metro, district, UUA, and new start staff needed to continue keeping the partners in close relationship longer. For example, if NTAUUS had been actively involved bringing their perspective to the process longer, it is possible they would have been more forthcoming with emergency funding this fall. We recommend the project maintain an Advisory Team with representatives from the major stakeholders including individuals with an understanding of business realities, and a willingness to

speak up. The satellite approach may be a way to avoid the disconnection Pathways experienced.

Sixth, the staffing of a new church should have been gradual. The Pathways Board said having multiple ministers and staff right away did not encourage their ownership. They said it had the opposite effect; it disempowered the lay leadership though the staff following Bandy's model were trying to empower not serve the congregation. Having five full time staff required extra time for team building and communication. Waiting to start religious education classes did not empower the members; it worked against the retention of new families. If it is fiscally possible and responsible to hire a minister for worship, a religious education professional, and an administrator all immediately, that would be best. However, if funding only allows for one hire, we believe it would be best to hire a minister first. (We are now fellowshipping ministers who are expected to have a broader range of skills including a basic competence in administration and religious education as well as worship.) The second hire should be a religious education professional, and the administrator third. Planting ministers must be assessed and trained.

Seventh, extensive marketing as a priority investment was essential to the projects progress. Significantly less money was spent on marketing than was called for in the plan. The start-up needed more money spent on marketing, and less on staff.

Eighth, worship services could have started earlier, and religious education classes should begin when worship does. (Our unique religious education could have been considered a signature ministry.) The review panel does not think the project erred by starting worship before having 300 in attendance. Anthony David wrote, "...We realized that people who weren't already UUs weren't going to check us out unless they got a taste of us first, and that taste would have to come through worship. [And] our small groups...were starting to suffer from frustration about the lack of an overall sense of identity and community. ...worship...is an essential way of unifying and gathering the 'tribes' as well as sending them out into the world for evangelism and service. ...we weren't going to be able to continue sparking congregational growth without a worship experience." Worship is central to a religious community and should begin before momentum is lost. Small groups are a valuable organizing tool but do not replace the unifying value of worship.

Ninth, the panel questions whether a generic liberal religious community church planting model will work for Unitarian Universalists. We may not be able to go out and plant like a community church. Our appeal is particular, a niche, which we have not fully developed. However, praise and intergenerational worship may have excluded too many of our current philosophical types to make for a viable start up. The two models of planting called for various degrees of change; we may not be able to change that much that quickly.

In her report on focus groups as the project was beginning, Dr. Susan Gore wrote: "Non-UU participants appeared more adventuresome than UUs in the range of activities, service schedules, congregational diversity and worship styles they considered appealing.

UUs appeared to expect the ‘new’ congregation to be essentially a large version of their existing churches. On the other hand, non-UU participants responded less negatively to the inclusion of a Christian component in the new congregational approach than current UUs who were strongly skeptical.”

We also see this difference in “branding,” through comparing the mission statement developed by the staff and early participants, which appeals more to “spiritual seekers,” and the mission statement recently crafted by the Pathways Board, which appeals more to our current theological spectrum. The original is: “Our mission at Pathways is to build a spiritual community that changes lives.” The new Pathways Church Business Plan presents a draft mission statement: “Pathways is a Unitarian Universalist community where open-minded people come to explore the beauty and wisdom of the world’s religions on their personal quest for truth.” More ownership by the membership may mean less of a new vision, the circling of the wagons, or an attempt to be grounded in the proximate and to be more effective.

The project was torn between growing a completely new and different church, which might mean not growing as expected, and growing a large church by doing what we do better. Maybe developing a stronger mission focus, maybe providing more services for members, or maybe another synthesis of the two models and various values would prove more productive. We don’t know for sure.

There have been questions about the degree in which UU identity was emphasized in the project. These range from the choice of the generic name, the praise style of worship, the fact standard UU RE curriculum were not instituted, and that Pathways has not yet affiliated. It is clear to us from visiting with them that they are UUs. And we are confident they would agree with us that our UU identity needs to be developed not abandoned.

The panel was asked to evaluate what happened in the Pathways Rapid Start Large Church, and document what we learned. We have been careful not to get into personnel issues, but to look at process and concepts. As directed, our recommendations are primarily limited to this way of starting new congregations and not to discussing its relative merits though our study raises questions about that.

Our tenth lesson is that we need to do a better, more focused job of growth. This means more experiments, but it also may mean less glamorous, slow, just a little bit “outside of the box” developmental growth, in which we learn more of what works well for us and expand on it. We think growth should be our number one priority, but perhaps as the Pathways new Business Plan states, we should “grow quickly but reasonably.”

The panel believes the project would have benefited from deeper communication about whom we are, what we want to become, and how we can do that better. This discussion would increase our prospects for growth in general.

There is much to celebrate in this experiment. We should not be discouraged about our religious value and potential for growth. It is good to experiment; and we have a valuable mission and message, one that saves and empowers. Even if we don't express it in exactly the same way; we have experienced it. Unitarian Universalism is a religion worth supporting and growing. It is critical to our survival that we share it with others, and extend its influence for peace and justice; the world needs us.

VI. Recommendations

1. Future Rapid Start Large Church efforts should change fewer variables.
2. There needs to be one model, consistently followed, of how the start-up will work, or conscious clarity on a synthesis.
3. The plan should be as realistic as possible, by which we mean it should be grounded in experience and tested by skeptical review.
4. There needs to be a focused project manager.
5. Strong integration with the wider UU community needs to be maintained. Integration can be achieved through a sponsoring congregation, a mentor, and an Advisory Team. The satellite method would be a way to encourage such integration.
6. Staffing should be gradual and financially prudent. The sequence of staffing should be minister for worship, religious education professional, and then administrator.
7. Worship of some sort should begin as soon as there are two small groups.
8. Religious education classes should begin when public worship services do.
9. Marketing needs to remain a major part of the plan.
10. The panel believes strongly that growth should be our association's number one priority. Before new Rapid Start Large Churches are developed, we recommend serious conversations about the value of a generic planting model for us. We believe UU identity should be affirmed and developed, and more attention should be given to growth strategies that build upon our strengths.

Pathways Review Documents

Growth Background

Growing Plans, Lyle Schaller, Chapter Four, “What Are The Issues in New Church Development?”.

“Church Planting For The 21st Century”, Easum, Bandy, and Associates.

Kicking Habits: Welcome Relief For Addicted Churches, Thomas Bandy.

The Very Large Church, Lyle Schaller.

UUA Growth Background

“UUA New Congregation Formation Task Force Final Report”, May 23 2002.

“Best Practices For Beginning Multi-Staff Large Congregations”, UUA.

“Growing Unitarian Universalism”, Tracey Robinson-Harris. October 2002.

“New Congregation Implementation Team Preliminary Strategic Plan”, Stefan Jonasson et al, April 2003.

“Report To The UUA Board of Trustees” Tracey Robinson-Harris, September 16, 2003.

“Excerpts from a Report to the Growth Working Group of the UUA Board of Trustees”, Stefan Jonasson, April 2004.

“Overview of the UUA Marketing Outreach 1999-2005”, Tracey Robinson-Harris, June 2005.

“Overview: Regional Metro Strategies 1999-2005”, Tracey Robinson- Harris, October 2005.

“An Evaluation of Discontinued UUA Growth Programs: Extensional, New Congregation and Racial Cultural Diversity Ministry”, Margaret Beard, November 2005.

“DFW Metro Growth Strategy Chronology/Pathways Chronology”, Tracey Robinson-Harris, January 2006.

The Pathways Project

“DFW Metroplex Growth Strategy for Unitarian Universalism”, Jonalu Johnstone, Fall 2002.

“Growth”, Ron Suiter, Metroplex Growth Steering Committee, November 2000, Revised 2002.

“Metropolitan Strategy For Growth: A Strategic Plan For Growing Unitarian Universalism in the Dallas/Ft. Worth Metroplex” July 2002.

“Ministerial Settlement System Congregational Record: New UU Congregation of Northeast Tarrant County, Texas”, Stefan Jonasson, et al, December 2002.

“Ministerial Search Packet for the Dallas/Ft. Worth Metroplex”, Search Committee, October 2002.

“An Imaginary Timeline Detailing A Strategy For Organizing The Church of the Free Spirit, Unitarian Universalist, in Northeast Tarrant County, Texas” Stefan Jonasson, January 2003.

“Update on Pathways Church to the UUA Board of Trustees” Anthony David, March 2004.

“Pathways DNA: Core Convictions and Core Values”, Anthony David et al, June 2004.

“Consultation Report for Pathways Church”, Thomas Bandy, September 2004.

“In Case Someone Asks How Come Only 150 for Pathway First Service” email, Tracey Robinson-Harris, to William Sinkford and Kay Montgomery, October 2004.

“Lead Pastor’s Report: State of Pathways Church” Anthony David, November 2004

“Pathways Church Metrics Version 1.02”, Anthony David, January 2005.

“Pathways Takes Different Approach to Worship”, Interconnections, March 2005.

“Community Blitz”, marketing effort, Anthony David, April 2005.

“Lead Pastor’s Report to the Pathways Board”, Anthony David, June 2005.

“Pathways To Growth: General Assembly Workshop”, Anthony David, June 2005.

“Snap Shot of Pathways at FY 2005 Year End”, email, Tracey Robinson-Harris to William Sinkford, Kay Montgomery and Terry Sweetser, July 2005.

“Responses to Pathways Board Questions: July, 2005 Meeting”, Anthony David, August 2005.

“September Board Letter to Pathways Congregation”, Pathways Church Board, September 2005.

“Follow Up Regarding Pathways”, email from Anthony David to various recipients, September 2005.

“Information Sharing With NTAUUS” (North Texas Association of Unitarian Universalist Societies), Pathways Church Board, October 2005.

“Pathways UU Church and a Conversation with the Senior Pastor, Anthony David”, Blog by Wayne Arnason and Kathleen Rolens, October 2005.

“The Journey” Pathways Church Newsletter, September, October, November, 2005.

“Welcome to Pathways Family Life Ministries”, December 2005.

“Letter from Pathways Church”, email from Pathways Church President and Minister to William Sinkford, December 2005.

“Minutes of the Board: Pathways Church: 2004-05”

“Pathways Church Business Plan”, Pathways Board, January 2006.

Financial Documents

“Check In”, email from Anthony David to Terry Sweetser with a copy to Laurel Hallman, January 2005.

“Pathways Plan vs. Actual Budget July 2002 through May 2005 with Projections through June 2007”, Pathways Staff, June 2005.

“Pathways Historical Financial Summary” Pathways Staff, September 2005.

“What Makes ‘Fair Share’ Fair? ”, email from Tracey Robinson-Harris, October 2005.

“Sources & Uses of Funds – Pathways”, email from Terry Sweetser, January 2006.

Additional Documents

“Statement of Vision”, Senior Ministers of Large UU Churches, May 2000.

“Now Is the Kairos Time: Draft Documents Discussing New Church Development Vision and Strategy in the United Church of Christ”, 2005.

“Guidebook for Planting New Congregations in the United Church of Christ”, Church Development and Renewal Evangelism Ministry Team, 2005.

“All Creatures Great and Small: Megachurches in Context, Draft”, Mark Chaves, October 2005.

Numerous emails on the 550plus UUA list serve.

“The 10 Most Common Mistakes Made by Church Plants”, Jim Griffith.

“Church Planting Typology Report”, Leadership Network, 2002.

“Steps to Planting a Dynamic UU Church” [author unknown].

Numerous emails on the Senior Ministers of Large UU Congregations list serve.

The Unitarian Universalist Voice: An Independent Journal of News and Opinion, 2005.

“Financial Advisor’s Report to the UUA General Assembly, Larry Ladd, 2001, 2005.

“Other Impediments to Growth: How Reliance on a Learned Clergy Keeps Us Small and Non-ambitious—A Personal and Institutional Essay”, Tom Belote, December 2005.

“Family Ministry as Curriculum”, (With History of the UU Congregation of Somerset Hills, NJ), Virginia Jarocha-Ernst, May 2000.

“A Year in the Life: A Strategy for the first 12 Months of the Northern Chester County Unitarian Universalist Congregation”, Ken Beldon, 2005.