

New Congregation Implementation Team

Preliminary Strategic Map

**Prepared for the Board of Trustees of the Unitarian Universalist Association
April 2003**

Background and Overview

The New Congregation Implementation Team was created in response to the Board of Trustees' request to the Congregational Services Staff Group to begin the development of strategies that would allow the Unitarian Universalist Association to implement the recommendations contained in the Final Report of the New Congregation Formation Task Force (May 2002).

The New Congregation Implementation Team met in Boston on April 7 and 8, 2003, to begin this exploration. The following individuals participated in the meeting: Tracey Robinson-Harris, Margaret Beard, Tom Chulak, Wayne Clark, Susan Gore, Stefan Jonasson, Paul Cole Jones, and Michael Tino. The Team reviewed the NCF Task Force Report, considered a variety of other documents and resources that inform this work, received a progress report on the Dallas/Fort Worth new congregation project, and gave extensive consideration of the anti-racist/anti-oppressive/multicultural commitment expressed by the Board of Trustees in its recent resolution.

We identified several assumptions that should guide the Association's efforts in establishing new large congregations, irrespective of geography, partnerships, and other considerations:

- If new congregations are to fulfill their potential, they must be mission-centered and the parties to their creation (sponsors, staff and members) must be mission-driven. In each case, the mission will be visionary, passionate, strategically savvy and aware of the congregation's context.
- While the minister(s) and other professional staff are vital to the success of a new large congregation, the selection of the lead minister(s) is a key ingredient in launching such a congregation.
- New strategies regarding congregation formation are likely to be useful in helping *all congregations* grow, so any emerging strategies should be shared widely with existing congregations as their efficacy becomes known.
- Whenever possible, the Association would best work in partnership with districts and local congregations, but it need not always be restrained by consideration of "turf issues."
- The anti-racist/anti-oppressive/multicultural values and norms of the Unitarian Universalist Association shall be foundational values for every

new large congregation initiative and these values shall permeate all aspects of any new congregation project in which the Association participates. This commitment should be reflected in the development of ministerial and other staff profiles, site selection, and like matters. Furthermore, the Association should commit to providing AR/AO/M support and training to the lead minister and program staff of all new multi-staff congregations.

- New congregation projects should articulate ways in which they will seek to be accountable to historically marginalized groups.
- New congregation projects should articulate ways in which they will seek to recruit, develop and utilize the leadership of youth and young adults.
- New congregation designs will *begin* beyond the existing barriers of size, cultural, age and generational characteristics of Unitarian Universalism.
- Our new approach to establishing new congregations will generate anxiety, tension, ambiguity and, in some circumstances, will lead to unintended consequences. Recognizing this, it is important to recognize that opportunity and risk are “partners” and articulate risk-taking as a positive value.

We identified four contexts in which new large congregations would most likely be developed:

- *Metropolitan Strategies*, in which the creation of one or more new large congregations is part of an overall strategy to grow our faith through a combination of strengthening existing congregations and establishing new ones within a target metropolitan area;
- *District-based Initiatives*, in which district resources and sponsorship are the primary organizing impetus;
- *Congregation-based Initiatives*, including satellite congregations and intentional multiple-staff spin-offs sponsored by an existing large congregation;
- *Planter Models* in areas currently unserved by Unitarian Universalism, initiated by the UUA in collaboration with whatever partners may be available in the particular target area.

Our strategic map will be organized around each of the four “bold recommendations” of the NCF Task Force report, giving consideration to specific strategic categories, as relevant: (1) *Strategy* – What must we commit? (2) *Tactics* – How do we get there? (3) *Delegation* – Who can best get us there? (4) *Implementation* – When do we start? How long do we try? (5) *Evaluation* – How will we determine whether or not we have achieved our goals, whether or not it was worth the effort, and how we might improve in future efforts?

FIRST NCF TASK FORCE RECOMMENDATION – The creation of ten multi-staff new congregations per year for each of the next five years.

- The New Congregation Implementation Team believes it is possible to identify at least fifty target sites where there would be a reasonable probability of success in planting new large congregations.
- The “Imaginary Timeline” developed for the Dallas/Fort Worth new congregation project is replicable as a template/organizational strategy for most other multi-staff new congregations.
- If, following the launch of the Dallas/Fort Worth new congregation in fiscal year 2004, we double our new start capacity every 18-24 months, we could reach the stated objective of ten new congregations per year no later than 2011.
- It is our recommendation that the selection of the lead minister for new multi-staff congregations follow a “hybrid model” (in contrast to the standard ministerial search process) similar to the selection of UUA district-based staff, whereby the UUA would narrow the list of applicants to a short-list of candidates, from whom a local selection committee (perhaps the new congregation’s steering committee) would choose. Moving in this direction would require dialogue between the UUA and the Unitarian Universalist Ministers Association.
- As the start rate for new multi-staff congregations increases, the UUA will need to increase denominational staff resources devoted to supporting and guiding the creation of such congregations, since UUA staff can be expected to take leading roles in the early stages of congregational development.

SECOND NCF TASK FORCE RECOMMENDATION – The establishment of milestones for the congregation’s development and subsequent funding. The use of clear criteria and evaluative measures to increase the chances of growing the Association while wisely spending precious resources.

- It is important to clarify which institution and/or individual holds decision-making authority for each major developmental task in the establishment of new congregations, when and where there are multiple sponsors (i.e., the UUA, districts, clusters, metro strategy committees).
- It is important to articulate what “success short of the goals” might look like. (For instance, the successful creation of a midsize congregation, when the stated goal was a large congregation, would hardly be a failure, even though it fell short of the goal.)
- The UUA should develop ministerial profiles and other guiding documents, against which performance can be assessed.

- AR/AO/M assessment and benchmarks would be useful in both gauging performance and also ensuring that our commitment remains conscious.

THIRD NCF TASK FORCE RECOMMENDATION – The UUA Board support congregational growth through significant contributions from the Campaign for Unitarian Universalism. The creation of a broad range of resources to support the creation and growth of new multi-staff congregations.

- The UUA must develop its capacity for providing leadership at each developmental stage – ongoing, outside, trusted consultants to enable and support the process, raise questions of local leaders, and make observations.
- The UUA should develop ministerial profiles and other guiding documents, as well as provide specialized support and training for ministers and other program staff in new multi-staff large congregations.
- Where possible, the UUA should encourage theological schools to offer programs aimed at developing the ministerial skills necessary to function in larger-sized congregations and rapid-growth situations, with a view to expanding the pool of ministers available who match the articulated profile.
- The UUA needs to clarify its fundraising capacity for supporting new multi-staff congregation, giving consideration to matters such as budgeting, financial development, sources of funds, timing, the desired mix of local and national contributions, and the role of the UUA’s Financial Development staff.
- It will be increasingly important to expand our technological capacity and resources to serve both new multi-staff congregations and existing ones.

FOURTH NCF TASK FORCE RECOMMENDATION – The UUA take an active role, in cooperation with districts, in providing funding resources for the creation of new multi-staff congregations. Districts take a lead role, including providing funding resources, for the creation of grassroots and spin-off congregations under 250 members.

- It is important to clarify the roles of district staff, boards and committees in new congregations projects. Which stakeholders should be involved in which decisions? What processes can be reasonably facilitated by district staff? What consulting services might districts offer?
- How do new multi-staff congregation projects connect with metropolitan strategies and/or district extension plans? How can congregations in the area play a meaningful role in such projects? How can they be

supported in their parallel efforts? How can some congregations be “neutralized” insofar as negative impact is concerned?

CHALLENGES AND NEXT STEPS

The Unitarian Universalist Association will undoubtedly be faced with several challenges in implementing the four bold recommendations contained in the Final Report of the New Congregation Formation Task Force:

- Some may see a conflict between Unitarian Universalist customs and norms, especially our tradition of congregational polity, and the notion of congregational planting. While there is no irreconcilable conflict in this regard, we can nevertheless expect some degree of “pushback” as the Association increasingly does things differently than it has in the past.
- Each individual new congregation project can be expected to involve political considerations peculiar to its particular context. It may be necessary, at times, for the Board of Trustees to help manage such political considerations when they arise.

The New Congregation Implementation Team envisions several “next steps” in moving forward to implementing the recommendations of the New Congregation Formation Task Force:

- The New Congregation Implementation Team will meet again on May 21 to further explore and refine this strategic map, and will report back to the Board of Trustees following that meeting.
- In consultation with districts and existing large congregations, and after a study of available demographic data, the New Congregation Implementation Team proposes to identify at least fifty target sites where there is a reasonable probability of success in planting new large congregations.
- The New Congregation Implementation Team proposes that a sub-group (Tracey Robinson-Harris, Margaret Beard, Wayne Clark and Stefan Jonasson) meet with the President of the Association and Financial Development staff to explore the potential financial capacity for supporting new congregation formation and begin determining strategies to exploit that capacity.

Appendix: template for organizing strategy



An Imaginary Timeline

Detailing a Strategy for the Organizing the Church of the Free Spirit, Unitarian Universalist, in Northeast Tarrant County, Texas

Preliminary Draft – January 2003

July 2002	<i>The Metropolitan Strategy for Growth</i> is completed as a strategic plan for Unitarian Universalist growth and extension in the Dallas/Fort Worth Metroplex. The project is supported by the Southwest UU Conference (SWUUC), the North Texas Association of UU Societies (NTAUUS), the Unitarian Universalist Association (UUA) and their member congregations in the Dallas/Fort Worth area.
August 2002	The Ministerial Search Committee meets to begin the process of identifying the Senior Minister who will lead the staff team in organizing an intentionally large new UU congregation in Northeast Tarrant County.
December 2002	The Ministerial Search Committee completes preparation of the <i>Ministerial Search Packet</i> , posts the congregational record sheet to the UUA Settlement System web site, and begins identifying and recruiting potential candidates.
January 2003	An Administrator begins work for the Growth Steering Committee and the UUA, whose responsibilities include supporting, arranging or directly accomplishing the following tasks: <ul style="list-style-type: none"> • Establishing a legal, tax-exempt entity; • Locating temporary space for start-up; • Locating site for first permanent church building; • Establishing a temporary office and setting up necessary system to ensure a smooth start-up; • Executing the initial marketing plan.
January 2003	The Ministerial Search Committee begins the initial review of applicants, selecting suitable applicants with whom to exchange packets.

February 2003	The Ministerial Search Committee identifies three or four ministerial candidates to interview.
February 2003	In collaboration with the Large Church Startup (LCS) Task Force, the Administrator oversees the implementation of the marketing plan. The LCS Task Force focuses on selecting a name for the new congregation, testing various possibilities in focus groups drawn from existing UU congregations and target constituencies, while the Administrator attends to the nuts-and-bolts of the marketing plan. The Administrator initiates cultivation of media contacts, assembles preliminary materials for press kits, prepares media for coming announcement of the selection of the Senior Minister.
March 2003	The Ministerial Search Committee selects a candidate and recommends her/him for appointment as Senior Minister.
Early April 2003	Selection of Senior Minister announced. Successful candidate begins completing ministry in present settlement (if applicable) and making arrangements to relocated to Dallas/Fort Worth area (if necessary). The LCS Task Force announces a name for the new congregation in keeping with the principles outlined in the marketing plan (i.e., Appendix IV of <i>The Metropolitan Strategy for Growth</i>).
April 2003	Search begins for a full-time Religious Educator.
Late April 2003	A web site infrastructure is in place on the Internet, so that the “Virtual Church of the Free Spirit” is in place for the arrival of the Senior Minister. Once it is fully underway, new content will appear at least twice weekly to ensure that visitors return to the web site regularly.
May 2003	The identity materials are unveiled – logo and letterhead, newsletter design, web design, signage, and introductory brochures.
May 2003	Direct mail campaign begins in the target area – “Coming soon to a spiritual void near you,” or some such approach.
June 2003	Land is selected and the acquisition process is underway.
June 2003	The Administrator finalizes the identification of suitable venues for holding meetings of various sizes and negotiates availability and rates with the owners or managers of the facilities.

August 2003	<p>Senior Minister begins work in NE Tarrant County.</p> <p>Search for a permanent Administrator begins. The Senior Minister will first determine whether or not to invite the Contract Administrator to consider the permanent position.</p>
September 2003	<p>Religious Educator begins work in NE Tarrant County.</p> <p>The Senior Minister and Religious Educator begin recruiting participants for the first covenant group.</p> <p>The ministers of neighboring congregations undertake to identify existing members and friends of their congregations who are potential constituents of the new congregation. They arrange for forums in their churches to introduce the Senior Minister and Religious Educator to prospective members of the new congregation.</p> <p>“A Start-up Weekend Unlike Any Other” – Facilitated by the UUA Large Church Coordinator and SWUUC District Staff, the staff of the new congregation join with staff and lay leaders of existing DFW congregations to launch and bless the NE Tarrant County extension enterprise.</p>
September 2003 to June 2004	<p>The Senior Minister guest preaches at UU congregations across the Metroplex as part of the strategy for building the potential member base by (i) cultivating existing UUs who might find the new congregation to be better suited to their needs and (ii) raising the project’s visibility so that UUs with friends or relatives in NE Tarrant County encourage them to become involved. Prospect information will be gathered at these guest appearances. These services will be broadcast live at the “Virtual Church of the Free Spirit” web site and archived there.</p> <p>At the same time, the Senior Minister seeks invitations to visit neighboring churches, synagogues and other spiritual communities in NE Tarrant County to cultivate good relations and raise awareness of the new congregation.</p>
September or October 2003	<p>The staff team participates in large church specific trainings to expand their skills and further develop strategies for the new start. Possible sites or agencies for this training include but are not limited to: The Alban Institute, Asbury Theological Seminary, The Leadership Network, or other large Unitarian Universalist congregations.</p>
October 2003	<p>Search begins for Youth Minister/Leader and Music Director, hiring to be completed by the end of the year.</p>

<p>October 2003</p>	<p>Senior Minister and Religious Educator convene the first covenant group, drawing together individuals who will each become (i) convenors of covenant groups as they emerge and (ii) likely leaders of the new congregation when it is formally organized.</p> <p>The target is for the number of covenant groups to double every two months until there are 300-400 individuals participating in 30-40 covenant groups by the end of the first year.</p>
<p>November 2003</p>	<p>The first public informational meeting is held to explain Unitarian Universalism and unveil the plan for a new congregation to residents of NE Tarrant County. Attendees will be encouraged to become involved in a covenant group and visit neighboring UU churches to become familiar with our faith. These public forums will continue on a regular basis, with particular attention being paid to developing the database of interested individuals.</p> <p>Outdoor Thanksgiving Gathering on the future building site if it has been acquired; otherwise, the use of a park or other suitable place will be secured.</p>
<p>January 2004</p>	<p>At the latest, the Speaker Series begins, bringing in high quality, high calibre Unitarian Universalists to address well-publicized public gatherings. (Possibilities: Christopher Reeve, Robert Fulghum, Forrest Church, Mary Pipher, Sylvia Ann Hewlett, Bill Sinkford, John Buehrens, Marilyn Sewell, Sara York, etc.)</p>
<p>January 2004</p>	<p>Children's Religious Education program is launched in rented space, utilizing teachers seconded by neighboring congregations. Adult education begins at the same time.</p>
<p>January or February 2004</p>	<p>Music Director and Youth Minister/Leader join the staff team.</p> <p>The Music Director begins gathering a choir from among the individuals expressing interest in the new congregation. The choir sings, at first, for no other reason than their own enjoyment but by spring they are singing in public venues.</p> <p>Youth Minister begins youth gatherings, utilizing covenant groups as one of the key organizing principles of the emerging youth program.</p>
<p>February or March 2004</p>	<p>Congregational Steering Committee established to assume the responsibilities of the LCS Task Force and lay the groundwork for the formal organization of the congregation.</p>

April 2004	Earliest likely date for the first public worship service, provided we can be reasonably certain of having <i>at least 300 individuals in attendance</i> . (If a critical mass develops before April, an earlier date will be concerned, <i>but only if we can be certain of <u>attendance</u> surpassing 300.</i>)
April to June 2004	An architect is engaged to draft plans for a facility that will be developed in three or four distinct phases.
May to December 2004	The congregation is formally organized and affiliated with the UUA and SWUUC sometime during this period. Individuals will be encouraged to join within six months of the organization date to be recognized as charter members. A financial canvass will be run concurrent with the process of formal organization.
October 2004	Covenant group participation reaches 300-400 adults in 30-40 different groups. In addition to participating in whole group activities, 60-80 youth are involved in 6-8 age-distinct covenant groups.
November 2004	Latest desirable date for the first public worship service, though the attendance target remains 300+.
January 2005	Adult membership – 350; average adult attendance – 600. Children registered – 140; average attendance – 200.
February to April 2005	“First Fruits” Capital Campaign to raise the funds necessary to begin construction of the physical plant. This will be the first of three likely capital drives during the first decade or so of the congregation’s existence.
June 2005	Ground is broken for construction of the first phase of the congregation’s new facility.
December 2005	New facility is occupied and dedicated.
January 2006	Adult membership – 600; average adult attendance – 750. Children registered – 200; average attendance – 250.