

**Best Practices Recommendations for Developing a Lifespan Faith and  
Spiritual Development Initiative  
at  
Eno River Unitarian Universalist Fellowship (ERUUF)**



Made to  
The ERUUF Executive Team  
and  
The Congregation  
of ERUUF

*The mission of the Eno River Unitarian Universalist Fellowship is to transform lives by building a free and inclusive covenantal religious community of spirit, service, justice, and love.*

By  
The Vision Quest Team:  
Searching for Best Practices in Lifespan Faith and Spiritual Development for ERUUF

January 28, 2009

*Do not go where the path may lead, go instead where there is no path and leave a trail.*

*—Ralph Waldo Emerson*

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## Acknowledgements

This endeavor has been successfully completed thanks to the contributions of many.

First, we'd like to thank the many ERUUFians (including youth) who before our work donated their resources of time and talent to raise and explore important questions about how ERUUF can better serve the faith and spiritual development of ALL who are in our spiritual community. We reviewed all written documentation from retreats, appreciative inquiries, forums, meetings, etc... from the ERUUF community. A full list of these can be found in the Appendix under: (ERUUF Specific Information, tab 19 in the notebook).

Second, we'd like to acknowledge the board and executive team and staff of ERUUF who supported and encouraged this lay-led exploration of best practices for ERUUF. We are proud to have participated in the first major lay-led initiative of ERUUF since our adoption of policy governance. We are encouraged and empowered by the way that the staff and executive team have responded to our work and how seriously they are preparing to consider and act on our recommendations for staffing, organization and programming.

Finally, we could not have completed this body of work without the generosity of ministers and staff and lay volunteers in the many congregations and fellowships that we investigated. These men and women work unbelievable hours and we are so grateful for their time, their leadership and the inspiration they provide to us all.

## Executive Summary

*Vision without action is a dream. Action without vision is simply passing the time. Action with vision is making a positive difference*  
– Joel Barker

Developing a lifespan faith and spiritual development (LFSD) program is a hot topic within the Unitarian Universalist (UU) movement at the national and district level. Ministers, staff and congregations are developing working definitions of LFSD and working to develop and pilot effective curriculum and programs to achieve the goals of LFSD initiatives. ERUUF has been on a similar quest and made the decision to launch a Vision Quest Team (VQT) to explore best practices in LFSD. The set of recommendations found in this report are the result of this 9-month endeavor.

The VQT set out on a process of deciding how to conduct a best practices research endeavor; determining goals and criteria for effective LFSD initiatives; identifying UU and non UU congregations to investigate; conducting extensive phone interviews and site visits; and synthesizing data collected into program grids, staff and programmatic recommendations.

The VQT worked diligently to align our research and recommendations to the mission and end statements of the congregation of ERUUF. We felt the four primary goals of LFSD initiatives are to:

- 1) develop a UU identity;
- 2) engage people in deeply meaningful, transformative liberal religious experience;
- 3) create a community of care, mutual respect, inclusiveness and love; and
- 4) reach beyond the congregation to live out UU values.

The Best Practices Recommendations Include:

- A Well-organized Lifespan Program for Children and Adults
- Wrap-around Sunday Programming
- Mid-Week Opportunity for Togetherness
- Authentic Opportunities for Interaction Across Ages
- A Covenantal Relationship with Volunteers
- Embedding Spiritual Development into our Work
- Small Group Ministries
- Management
- Supportive Practices
- Organizing and Staffing recommendations
- Next steps - getting started

In this report, you will find descriptions of the background and process we used for conducting this best practices research, a listing of the 14 Unitarian Universalist (UU) and 6 non UU congregations we investigated, best practices recommendations for programming and staffing and a list of next steps we believe ERUUF should undertake to move our beloved congregation towards for an effective LFSD initiative.

## Important lessons learned

- There is no consensus within the UUA on definitions or effective programming for LFSD initiatives.
- There was no self-contained model of LFSD programming found in our search. Rather, we found examples of best practices in individual fellowships that we investigated.
- Many congregations are struggling with what LFSD really looks like and how to do it well.
- Most congregations want to have more integrated faith and spiritual development opportunities across ages but few think they do this well.
- Most UU adult programs are not as structured as the children's programming (no tracks of study, no sequenced curriculum).
- Effective programs depend on effective paid and volunteer staff: "getting the right people on the bus." But you also can't let the program depend on the person.
- Few congregations have fully developed evaluation and accountability methods.
- When choosing programming, it should be evaluated for sustainability (as evidenced by being successfully implemented across congregations or maintained despite turnover). It cannot be specific to a single staff person or overly dependent on the skills of an individual.
- The more effective congregations are continuously re-evaluating themselves.
- The site visits were important to understanding the details of how things really work and how implementation of effective programming happens. We were able to learn more in person than by phone.
- Although non-UU congregations have valuable lessons to share, it can be challenging to adapt these practices to a non-creedal environment.

## Background and Process

*Limitations: In order to understand the process the VQT underwent to fulfill its charge of conducting a best practices search in LFSD, the following limitations need to be understood:*

- *Due to time and budget constraints, the VQT only conducted research on 6 non UU congregations, all regionally located.*
- *The availability of information on each congregation investigated varied widely depending on accessibility to staff, the usefulness of websites as a resource, uniqueness of programming, time and funds available for site visits.*
- *While the VQT made every attempt to find best practices in LFSD within the UUA, it is important to remember that it is probable that we missed some of these congregations in our research. And we are certain there is more we could learn from the fellowships and congregations we investigated. This report is based on what information we could gather during our months of investigation.*

The vision quest for best practices in LFSD began as the result of a variety of initiatives, inquiries, and retreats held at ERUUF over the last few years, including congregational cottage meetings and appreciative inquiry gatherings, adult religious education research efforts, children/youth religious education retreats and a lifespan initiative begun in the Spring of 2006. Each of these gatherings and initiatives touched on the need for a comprehensive plan for the faith and spiritual development for all at ERUUF. At a January, 2008 Religious Education Visioning retreat, facilitated by Sue Sinamon, lifespan director for the Thomas Jefferson district, one of the action steps for moving toward a lifespan model for ERUUF was to form the VQT to conduct a best practices study for ERUUF. Audrey Green, then chair of the RE committee, agreed to chair this effort. A 6-member team was formed (see list below). As ERUUF had recently moved into a policy governance modality of governance, the executive team met and agreed to endorse, fund and charge the lay-led inquiry into best practices in LFSD.

*The Charge* (as given to the VQT from the executive team on April 27, 2008):

The Vision Quest team's charge is to review lifespan faith and spiritual development programs (for all ages) from around the country (both UU and non-UU) and any other pertinent resources so they can recommend a best practices, world class program of lifespan Faith/Spiritual Development for ERUUF. This recommendation should include the program model, resources required and a timeline for implementation. The executive Team would like these recommendations no later than December 31, 2008 (amended 11/08: staffing structures by this date, report by January 31, 2009) and will ask for periodic updates so we can integrate the task force's thinking into the ministry and staffing models we will be developing. The Assistant Minister for Spiritual Development (Deborah Cayer) and Jean O'Barr will be the task force's liaisons to the Executive Team.

### The Vision Quest Team

Trish Baron  
Julie Edmunds  
Audrey Green, chair  
Betsy LaForge  
Richard Laxar  
Liz Raymer  
Georgie Searles

Liaison to executive committee:  
Jean O'Barr  
Ministerial liaison: Deborah Cayer

*Background materials and resources used.* The team gathered background materials were gathered from the following sources to be reviewed and used for preparing the team for embarking on the task of establishing

criteria to be used for determining best practices in our research. These documents are provided in the appendix of this report:

- ERUUF mission and end statements
- Adult education research results – conducted by ISES (Richard Laxar)
- Appreciative Inquiry wishes by category grid
- Definitions of faith development from RE retreat (1/08) and district (provided by Sue Sinamon)
- RE Visioning Retreat report (1/08)
- Lifespan Faith Development report to the UUA Board of Trustees, April, 2008
- Mission statement of lay-led lifespan development initiative, spring 2006
- Results from ERUUF youth conversations retreats
- Questions from RE committee members
- Summary of Essex conversations
- Notes from UUA Large Congregation Conference

*The four primary goals of LFSD initiatives.* The VQT synthesized the information from background research materials; congregational input from forums, retreats and inquiries and ERUUF mission and ends statements (all of which can be found in the appendix of this report) to develop four primary goal for LFSD programming at ERUUF. A comprehensive LFSD initiative would address these four goals:

1. Develops a UU identity: Develop an understanding of UU principles and how to apply those in our lives
2. Engages people in deeply meaningful, transformative liberal religious experience
3. Creates a community of care, mutual respect, inclusiveness and love
  - a. Within specific populations (developmentally appropriate and need appropriate),
  - b. Across specific populations
4. Reaches beyond the congregation to live out UU values - reaching out to the broader community

*The VQT's Criteria for Best Practices in LFSD programming.* Using the different resources and sources of information, the VQT developed a list of criteria that should be included in a strong LFSD program.

- ✓ Developmentally appropriate, addresses unique needs of different ages and life stages: Children, Youth, Young adults, Families, Single adults, Empty nesters, Seniors, End of life, People grieving the loss of a loved one
- ✓ Welcoming and accessible
- ✓ Takes active steps to make sure people know about the program(s), can access the program(s), and feel welcome
- ✓ Intergenerational - supports integration of all ages to share and learn from one another
- ✓ Engage in supportive, caring relationships with others (including those of different ages)
- ✓ Teaches and models tolerance, respect, and compassion
- ✓ Teaches and practices social justice
- ✓ Develops and deepen individual spiritual practice – nurtures spiritual practice including understanding, experiencing and practicing different religious traditions and spiritual practices
- ✓ Helps participants gain the skills to make moral decisions
- ✓ Encourages and supports questioning
- ✓ Recognizes and nurtures the talents and gifts of our members, empowering them to become involved

*An unanswered question is a fine traveling companion. It sharpens your eye for the road*  
– Rachel Naomi Reme

- ✓ Embraces and affirms UU identity, heritage and values
- ✓ Reaches beyond the congregation to live out UU values
- ✓ Teaches and models a reverence for life and creation
- ✓ Sustainability
- ✓ Clearly articulated vision that is maintained across all aspects
- ✓ Accountability

*Selecting congregations for investigation:* The VQT started with a list of 19 congregations for research consideration based on nominations by VQT members, recommendations from UUA, Sue Sinamon at TJD, Don Southworth, Kate Beasley and others.

The VQT conducted initial information gathering from websites and general information phone calls. Based on the results of this inquiry, we determined which congregations should be further explored either in second tier phone interview or site visit. The list of congregations for research was narrowed down to fifteen UU and 6 non-UU. For the purposes of this report, each of the UU fellowships will be referenced by their city of location; non UU congregations will be referred to by their name below.

Unitarian Universalist (in order as they appear in program grid in appendix)

All Souls Church, Unitarian, Washington, DC  
 First Unitarian Universalist Church of San Diego, San Diego, CA  
 Fox Valley Unitarian Universalist Fellowship, Appleton, WI  
 Unitarian Universalist Church of Atlanta, Atlanta, GA  
 First Unitarian Church of Dallas, Dallas, TX  
 First Unitarian Church, Portland, OR  
 First Unitarian Church, Rochester, NY  
 First Parish in Concord, Concord, MA  
 Jefferson Unitarian Church, Golden, CO  
 Unity Church-Unitarian, St. Paul, MN  
 Neighborhood Unitarian Universalist Church, Pasadena, CA  
 The North Parish of North Andover, N. Andover, MA  
 Unitarian Universalist Community Church, Santa Monica, CA  
 First Unitarian Society of Madison, Madison, WI

Non Unitarian Universalist:

Olin T. Binkley Baptist Church, Chapel Hill, NC  
 Pullen Baptist Church, Raleigh, NC  
 King's Park International, Durham, NC  
 Westminster Presbyterian Church, Durham, NC  
 St. Phillips Episcopal Church, Durham, NC  
 United Church of Christ, Chapel Hill, NC

*Interviews:* VQT members contacted staff from the congregations to obtain an overview of the programming. These individuals were often Directors of Religious Education (either for children or adults). The first interview used the Tier One Interview Protocol. Team members followed up with additional Tier Two questions through an additional interview or the site visit (see faith development criteria grid, showing tier one and tier two interview questions in appendix).

*Site visits:* VQT members conducted multi-day site visits to selected congregations based on strengths and accessibility: All Souls, DC; UUCA, Atlanta; Fox Valley, Appleton, WI; First UU, San Diego.

While impossible to see everything at the congregations visited, the site visits allowed us to observe first hand the staff, some programs, worship services and to get an overall sense of the culture. Our criteria for choosing which congregations to visit included: congregation size, staffing, identified best practices, geographic location (helping us prudently use budgeted resources), accessibility of staff at sites and opportunities based on VQT member personal travel plans.

*Reporting.* The VQT synthesized our findings into UU and non UU congregation/program grids (see appendix) and this final best practices recommendation report.

*A couple of notes about terminology:* **Staff** refers to both paid and volunteer staff unless specified otherwise.

For the purposes of this report, the UU fellowships investigated are referred to by the city in which they reside, non UU congregations by their name.

## Best Practices in LSFD Programming Recommendations

### I. A Well-organized Lifespan Program for Children and Adults

During the various phases of our lives, we have different needs for the development of our spiritual personas and different methods of learning to which we are receptive. In the early phase of our lives as children, we are not aware of our needs but our parents are responsible for developing in us an awareness of our moral obligations as human beings. They, and the community, instruct us in those obligations in the classroom and by serving as examples.

As adults, we know our moral obligations and are sometimes aware of our spiritual needs. We engage in relationships with individuals and organizations such as religious institutions to further our knowledge and help us relate our lives to the world around us. We rely on those institutions to help us find the way to a deeper understanding of ourselves and for a path to becoming better citizens of the community of all peoples. We believe that the principles of Unitarian Universalism describe that path well and look to the organization to help us understand and live those principles.

To aid in learning and implementing those principles, we look to the congregation to provide us a program for our lifespan, a program of continuing spiritual and faith development. We have observed in other congregations the following key elements of a lifespan program:

- *Covenantal*: It is incumbent upon all to participate in the life of the congregation and the support of the other members to the best of one's ability and consistent with the varying skills of the individual. (Although Stefan Jonasson suggests that it is unnecessary/unreasonable to expect all to contribute all the time, we believe that most should be sharing the work, if possible.)
- *Clear Curriculum*. The principles and practices of the Unitarian Universalist faith are well established. This curriculum should be tied to the four identified goals for LSFD:
  - Developing a UU identity
  - Engaging people in deeply meaningful, transformative liberal religious experience
  - Creating a community of care, mutual respect, inclusiveness and love
  - Reaching beyond the congregation

*The Tapestry of Faith curriculum is heavily used at all ages at many of the congregations investigated and it is strongly recommended as a best practice.*

There must be a clear and consistent presentation of these principles and practices repeatedly over time, for new members and established members who desire a refresher or wish to explore an area more deeply. The principles and practices should be presented in a format appropriate to the age of the student.

We observed many programs and curricula and all had some merit. Many congregations had the word "Lifespan" in the title over their activities. The North Andover congregation had a very coherent framework which described the objectives and structure for such a program, overarching goals were stated and the meaning of those goals was explicitly defined. It is also evident that a

broad spectrum of activities, not just classroom education, can and should be an integral part of a curriculum.

- *Coordination.* It is possible for different people to have responsibility for different parts/age groups of an integrated curriculum. To ensure a consistent, coordinated, and coherent message is presented to all, strong cooperation and mutual aid should be expected and structured into the management of the Spiritual and Faith Development mission. The use of Ministry Teams and/or staff that are responsible for both child and adult programming is an approach used by several congregations to achieve this goal.
- *Visibility.* Ensuring members know about the opportunities available to them, for both adult and child programming, is critical. This can and should be communicated through multiple means and made highly visible to the congregation. For example, Appleton promotes Adult Programming through brochures, refrigerator magnets, the website, and bulletins in the order of service. Atlanta promotes their programming through family handbook, emails, the website and at their family welcome table each Sunday. Weekly "Home Links" sheets help parents stay abreast of the programming and topic focus for their children.
- *Identity.* Several of the DRE's interviewed emphasized the importance of building a strong identity for each grade level or development level of RE, allowing parents and children to know what to expect and anticipate what is to come. Others use rotational workshops that coordinate spiritual themes across all ages. Other models, such as "Way Cool Sunday School" use a different theme for each Sunday of the month, rotating integrated social justice topics/action, arts and crafts, and other topics that cut across all ages. Clearly articulating and communicating the structure is what is important. The same can be said for adult programming. Atlanta's children's curriculum is clear and consistent. Their 8th grade Coming of Age program, for example, is greatly anticipated by younger middle schoolers and looked upon as launching pad for becoming active congregational members in high school. Andover has a great program of acknowledging family milestones (gifts and kits for each life stage of development).

*Things to think about:*

- Curriculum development can be very time consuming to do well. As such, adopting an existing curricula may be the easiest thing to do
- Relative to RE for Children and Youth, it may be most effective to adopt a set curriculum for each age group such that children know what to expect in the upcoming year. This can be challenging, however, when changing enrollment patterns require different groupings of classes. For example, a small number of 4th graders in a given year may require them to be grouped with either the 3rd or 5th graders. Brainstorming creative scheduling possibilities may be required..

## *Curricula Used by Other Congregations*

### *Children and Youth:*

Spirit Play (Appleton, Concord, Santa Monica, St. Paul, Santa Monica)

Tapestry of Faith for children from UUA (Atlanta, Dallas, DC, San Diego, Portland, Colorado, Madison)

Workshop Rotation--home grown (Concord, St. Paul, Pasadena)

Popcorn Theology (Appleton, Atlanta)

Tapestry of Faith for youth--Compass Points (Appleton, Atlanta)

Free to Believe (Appleton, Portland, Colorado)

Bibleodeon (Colorado, Portland, Madison)

Neighboring Faiths (Pasadena, Colorado, Santa Monica, Concord)

Coming of Age (most congregation offer COA; however, the timing of COA varies starting with 8<sup>th</sup> grade in Atlanta and Colorado)

OWL (most congregations offer OWL; however, the timing varies. Pasadena has OWL for five age groups, Atlanta offers to elementary and middle school ages)

### *Adult:*

Tapestry of Faith for Adults (Spirit of Life) –currently in beta testing at UUA, worth looking into

Tapestry of Faith for Adults (Spirit in Practice) (San Diego, Atlanta, Concord)

Wellspring (home grown for Wellspring Wednesdays) (Rochester, NY)

Creating a Soulful Path (DC)

Coming of Age for adults (run concurrently with COA for youth in San Diego, being tested for adults in Appleton)

OWL for adults (Pasadena)

## II. Wrap-Around Sunday Programming

Strong programs connect their Sunday worship topics and experiences with other events on Sunday morning, allowing for common language and discussion between and among congregants as well as family members. We call this cohesive presentation of Sunday morning activities “wrap-around Sunday programming” to indicate the coordination that occurs. Wrap-around programming may include the following components:

- *Purposeful links between worship topics and religious education for children.* Some congregations coordinate the topics for sermons and RE programming. This requires significant advance planning with topics often laid out for the entire year. For example, St. Paul has identified monthly themes that guide all of the programming offered--during Sunday worship, children's RE programming, and their Wednesday night programming. Pasadena has also developed monthly themes that direct worship and programming. As part of this, they pull together a list of resources related to the theme being discussed. Atlanta uses a once a month linking concept, where each month, children and youth stay 30 minutes into the service, then move to their classrooms where they discuss the theme of the service. Adults are provided with linking discussion questions in the order of service to help guide conversation with children after the service. San Diego provides “homelinks” publication to help members of the congregation engage their family in discussion about the worship topic.
- *Rituals and experiences shared with children and adults.* Most congregations have children participating in the beginning of the services. This allows for there to be a common experience between children and adults. To make the beginning of services meaningful for children and adults, some congregations involve children in key components. For example, Atlanta always has children who light the chalice. And children always begin in the worship service with the adults. (Raleigh is developing and implementing an IG service every Sunday using the same language and ritual every week to create a sense of the UU experience for children.) Several congregations, such as Appleton and Dallas, have moved youth groups meets to evenings, which allows the youth to participate in regular worship services. Appleton recently designated two rows of pews specifically for the youth to sit together. In addition, the Senior High Youth group at Appleton is responsible for planning and carrying out four worship services per year. These services are extremely well attended.
- *Adult opportunities for interaction around sermon.* Congregations may provide opportunities for adults to respond to or discuss the sermon on Sunday mornings. For example, Dallas holds both adult “Sunday school” and “Spiritual Conversations” between worship services each week. Appleton incorporates a 10 – minute “Talk Back” following the sermon as part of the order of service. The talk back is an opportunity for congregants to reflect and respond to the sermon on the spot. Seeing this in action is powerful, it strongly reinforces UU principles of listening, reflecting, and the individual responsibility to search for meaning and grow spiritually.

*Things to think about:*

- Coordinating topics between worship and children’s RE may be very challenging depending on the nature of the curriculum adopted for children’s RE. If the curriculum is very sequential, then it may be more appropriate for children’s RE to follow the curriculum and only make connections to the worship service when appropriate. If children’s RE uses workshop rotation or a home-grown curriculum, then it may be easier and worthwhile to coordinate topics with the worship service. Developing a curriculum faces its own challenges, however.

### III. Mid-Week Opportunity for Togetherness

Creating mid-week opportunities for spiritual deepening, community building and fellowship are common among both UU and non-UU congregations. The strongest mid-week programming options we saw included the following components:

*Wellspring Wednesdays at St. Paul  
(from their website)*

Each week, the entire church community is welcome to congregate on Wednesday evenings for a 'church night' gathering. This is a time for you to engage yourself and your family in this religious community and a time to cultivate the values we believe in.

The evening begins with a hot, nutritious meal. It's a time to gather with friends and family and have some good conversation. After dinner, we come together for a brief time of intergenerational reflection and worship.

Following the worship service, [classes and workshops](#) are offered for those of all ages. These opportunities cover a wide range of interests, from lectures to crafts, from classes on UU history to theatrical workshops. Each season's offerings will be a little bit different — and there will always be a wide variety to choose from.

If organized offerings are not what you are looking for, there is always space for socializing. Age-appropriate activities are available for children and youth, including a homework room for those who need to do some studying and childcare for those under the age of 3.

**Schedule for every Wednesday evening:**

6:00: Dinner

6:45: Worship

7:10: Workshops, classes, meetings, and

it's significance.

- *A meal.* All of the mid-week programming started with a meal, which may be sponsored, catered or a pot luck. Atlanta's meals are sponsored by one of their many interest groups. The meal preparation has become a fund and awareness raiser for interest groups. Appleton found that relying on congregants to provide the meal was burdensome, so meals are catered by a nearby restaurant and congregants pay a minimal fee.
- *Intergenerational worship services.* After the meal, there is a short IG service (less than 30 minutes). In many cases, these services are not run by the lead ministers but by lay leaders, youth or others. Mid-week programs are an important way for members to connect, particularly among large congregations with multiple worship services.
- *Structured programming.* This programming can take different forms such as classes or thematic activities. These classes may be age-specific or may be intergenerational. Child care is provided for the nursery-age. For example, Dallas has age-specific classes most of the time but once a month they had IG social justice project in which everyone participated. Appleton had adult classes and the children had related activities. Atlanta's Wednesday night programming always has thematic age appropriate classes; IG Tai-Chi/Yoga class; it also the practice night for the Youth Choir and their Theater group. And most Wednesdays, there is an option for "popcorn theology" where multi-aged viewers gather to watch a film and discuss then discuss

- *No meetings allowed.* For some congregations the mid-week gathering night is one night in which no other business meetings are scheduled. This is a time for the congregation to come together and be enriched by each other. Should ERUUF decide to reinstate mid-week fellowship, it is highly recommended that this "no meetings allowed" policy is enforced.

*Things to think about:* A mid-week session may be slow to get started as people get use to the idea of attending. Given the number of other congregations doing this, it seems worth trying it for a long enough time that people learn to expect it and work it into their schedules. Many congregations offer non-Sunday worship services. For example,

Appleton, San Diego, and Madison have added Saturday afternoon worship services. Initiated as a way to accommodate growing membership, these fellowships have found the non-Sunday services to be extremely popular, particular among families.

#### IV. Authentic Opportunities for Interaction across Ages

The goal of developing and fostering relationships within the congregation and across age ranges is one to which every congregation aspires and yet remains a significant challenge for all of them as well. The primary lesson we learned was that opportunities to interact across ages need to be authentic. This means that the congregation needs to set up events and structures in a way that supports genuine and natural interactions for adults, children, and youth. This is frequently done through activities that appeal to all ages. By this, we do not mean activities that are considered IG but that are really targeted only at the families of children and youth. In the congregations we examined, we found different sets of activities that appeared to foster genuine interaction across the ages.

- *Social justice activities.* Social justice activities are often seen as some of the most successful ways to promote interaction across the ages. In particular, activities that allow for both children and adults to use their skills. For example, Dallas held an eRacism Conference that they saw as one of their most successful intergenerational events. St. Paul gave each household an envelope with some cash in it, "Bless the World Fund" and they were supposed to use it in some way to make the world a better place. Congregants wrote about what they were doing with the money on the "Bless the World" blog. At Santa Monica, the fourth Sunday RE of every month is dedicated to an social justice activity for youth and children, which frequently also draws adult member participation. This "Way Cool Sunday School" approach often takes place off-campus, such as a nearby park to plant trees or to the beach to pick up trash.
- *Social events.* There are social activities that can naturally appeal to people across ages. Dallas hosted a Mardi Gras party that included a live band and was enjoyed by children and adults. Other congregations have hosted movie nights or game nights. St. Paul hosts monthly Pancake Breakfasts on Saturday mornings.
- *Artistic opportunities or events.* Many congregations do congregation-wide artistic products, such as musicals or plays. San Diego has an intergenerational theater group. Atlanta has a congregation-wide Annual Art Show. Atlanta also has a theater group, the productions not only provide community building, but it also generates income for the congregation. Atlanta has been established as a art gallery, allowing it's art display rotation and sales to generate income for the congregation. Congregations may also host small groups, such as writing groups that are open to participation by all ages.
- *Organized weekend events.* Some congregations host intergenerational weekend events such as camping, beach trips or retreats. For example, Concord hosts a weekend camping excursion where members camp or

Appleton has integrated what could be considered a best practice in engaging youth in worship. The Sr. High program is charged with fully planning and delivering quarterly worship services. During our visit to Appleton the congregation was still a buzz with their feedback on the impressive youth service held two weeks prior on the United Nations Human Bill of Rights. Youth are also invited and encouraged to attend regular worship services, and two rows are reserved specifically for them. Youth feel fully engaged and a strong part of the Appleton membership.

stay in cabins and share communal meals.

- *IG worship opportunities.* While the majority of UU congregations have abandoned or never considered fully intergenerational worship services (all ages all the time), most have intergenerational services several times throughout the year and/or invite children and youth to join in the first 15 minutes of the service. Atlanta has a 1<sup>st</sup> Sunday worship theme and children/youth stay longer in the service. Madison has a “Service for all ages” four times a year that revolves around a story for all ages. Pasadena’s Celebration Sundays are intergenerational and held several times a year. Children’s choirs are common and baptisms are typically held while the children are in attendance.

Non-UU congregations have taken a very different approach. In every case explored, worship services were intergenerational (except for nursery age children) and “Sunday School” for all age levels (including adults) was held between or before services. UU’s in general seem to have strong opposition to this approach, finding it difficult for adults and children alike to sit patiently through an entire service.

*Things to think about:*

- Intergenerational worship experiences remain challenging to do well. Most of the congregations we talked to were not satisfied with their IG worship. If the worship services are supposed to be the primary way in which adults get their spiritual development, then it may be very challenging to design a service that appeals to both children and adults. If, on the other hand, the purpose of the worship service is to familiarize everyone with the practices and rituals of being a U-U and the spiritual development occurs in other settings (such as Sunday School), then an IG worship experience may be appropriate. Raleigh is experimenting with a fully IG service and it will be worth watching.

## V. A Covenantal Relationship with Volunteers

Strong programming depends on a strong base of volunteers. Congregations with a strong volunteer base establish a covenantal relationship with their volunteers. This covenantal relationship includes strong expectations of and support for their volunteers. Specific aspects of a covenantal relationship include the following:

- *Congregations covenant (like a cooperative) with their volunteers* about the relationship they can expect to have with each other (San Diego, All Souls).
- *Volunteering as an expectation of participation in congregational life.* Congregations attempt to establish clear expectations about volunteering. Many congregations mandate some sort of volunteering for families participating in RE. For example, St. Paul mandates that each family with a child enrolled in RE participate in at least 10 hours of volunteer work. They can fulfill this responsibility by teaching, assisting with events, organizing supplies, etc. During RE registration, parents are asked to commit to at least one activity that will give them their 10 hours of participation. San Diego calls its program "cooperative" and asks for 6 volunteer hours/family, such as teaching, special events, office work or "call and we'll get something out".

Congregations mandating volunteering for RE parents: Concord, St. Paul, San Diego, Pasadena, Santa Monica

While the need for volunteers is often most great in the children and youth RE programming, ERUUF could communicate a similar expectation for everyone. This level of expectation is much more common in non-UU congregations, where volunteerism is a clear expectation of all members and the completion of "time and talent" commitments are often part of the annual pledging process.

### *The Family Ministries Network*

Started by First Unitarian at Dallas, and adopted by other congregations, including Atlanta, the Family Ministry model is an approach to volunteering that is designed to facilitate three areas: completion of tasks, community building, and spiritual development (see handbook in resource materials)

- *Aligning volunteer work with skill sets and interests.* If volunteering is an expectation, it is necessary to provide different sorts of voluntary opportunities. Congregations using the workshop rotation model of children's RE (such as St. Paul and Concord) believe that it is easier to match congregants' skills with voluntary opportunities.
- *Providing support and training.* Whenever someone is volunteering, there needs to be adequate support and training for those volunteers. Several congregations commented on the importance of well outlined lesson plans and having needed materials organized and ready for volunteers when they enter the classroom. At Appleton the DRE checks in with every volunteer teacher right before classes start and once classes have started to ensure they have everything needed. If children are struggling or difficult to manage, the DRE intervenes so that teachers can focus on the rest of the classroom. Atlanta requires all teachers attend teacher training, usually a day-long session. Madison provides special specific training in learning patterns of children.
- *Gathering ongoing feedback.* Several congregations have weekly feedback surveys for the volunteer

teachers, so that staff can identify and respond immediately to concerns or frustrations, as well as quickly identify what is working well.

*Things to Think About:*

- Mandating volunteer work is often challenging to enforce. Will you really kick someone's child out of RE because their parents did not participate? One possibility might be to communicate a strong expectation without any additional accountability. The key appears to be establishing and communicating expectations in advance and, over time, creating a congregational culture of volunteerism. If this is well done, "mandates" may not be necessary.
- The Family Ministry Network model works particularly well in accomplishing tasks. The spiritual development goal of the model is challenging to reach according to its creators. It may make sense to start with the model to do the relatively straight-forward job of completing tasks and then explore ways in which to bring in family spiritual development.

## VI. Embedding Spiritual Development into our Work

ERUUF is a community of individuals dedicated to spiritual growth and development. As such, the Vision Quest team believes it is important to embed spiritual development into our everyday work for adults and children. While we did not find much in the way of suggestions from other conversations, we believe that a pervasive presence of spirituality will greatly enhance the congregational experience. We have three primary suggestions in this area:

- *Engage the staff in regular spiritual practice together.* Some congregations are beginning to explore how the regular staff can support each other in spiritual growth. This may involve the establishment of a regular time for joint meditation, reflection, joys and concerns, or community-building. For example, Atlanta has weekly staff worship.
- *Establish a culture of intentionality around embedding spiritual development into the “culture” of a congregation.* The rituals and covenants of the congregation help support this (chalice lightings, regularly soliciting feedback, encouragement of healthy dialogue among members and staff, etc). These rituals and experiences are appropriate for all ages.
- *Embed spiritual development into the work of volunteers.* For many volunteers, doing the work of ERUUF can end up feeling too much like the regular 9 to 5 work. The book “Contemplative Ministry” promotes the establishment of adult groups that use contemplative spiritual practices to make decisions about how to best serve youth. Spiritual development thus becomes a part of the volunteer work and provides a frame for conducting the work. Atlanta promotes notion of "contemplative activism," encouraging congregational "doers" to take time for reflection.

*Things to think about:*

- There are some individuals who will want to focus on the work aspect of volunteering. They derive satisfaction from the accomplishment of tasks and may not want to spend time on other things they view as a distraction to the task itself. Groups interested in embedding more spiritual practice into their work will have to covenant together around what this might look like.

## VII. Small Group Ministries

There is a strong consensus that once a congregation achieves a certain size, it is absolutely necessary to have a comprehensive and effective program of small group ministries to establish and maintain the “connectedness” of the individual to the congregation. Stefan Jonasson states that the size of the congregation in which everyone knows everyone else is much less than 150 members. The connectedness fostered by small group ministries contributes to spiritual development through the participation of members in a wide variety of activities. These activities are not just purely religious practices, but include bonding with other members through participation in other activities within the congregation, social justice activities in the broader community and sharing of one’s deepest feelings with others in the most intimate of small groups.

All of the congregations we have researched have significant small group ministry activities, often intertwined with the other activities of the congregation. The best practices include the following:

- *Covenant Groups.* Small groups of members who meet regularly for the purpose of discussions of issues, performance of projects related to the overall ends of the congregation, and the maintenance of a small social community within which the members become very well-known to each other over an extended period of time.
- *Activity Groups.* Members who join together to perform a specific activity which may be either repetitive or unique and which in some way is related to the overall ends of the congregation. These tend to be very diverse in demographics of the participants and the range of activities. These activities can occur solely within the congregation or as part of the larger community. Atlanta has very strong age-specific activity groups 20’s and 30’s; 40’s – 50’s; “daylight” lunch group for the elderly. DC has a strong young adult activity group.
- *Affinity Groups.* Members who join together to share a specific interest or need, often for mutual support, and also who are seeking “like” people with a common experience or desire. San Diego has a strong men’s group of particular interest. St. Paul’s also has a strong men’s affinity group.

While small group ministries are more often than not self-initiating and self-sustaining as a result of its members’ desires, it is very beneficial for the leadership of the congregation to inspire and support their formation. The best practices we have seen include the following:

- *Ministerial Support.* It is typical for larger congregations to have a member of the ministerial staff (or the lead minister) “oversee” the small group ministries. This oversight is usually very light supervision to ensure that the small group ministry is compatible with the ends of the organization and that the entire membership is aware of the small group.

However, given the significant benefits to the congregation and its membership, it is quite important that the ministerial function actively nurture these efforts. A deft hand is essential to ensure that they function satisfactorily, ideally without becoming overly involved and responsible for their day-to-day operation.

- *Staff/Facility Support.* Some groups will require a certain amount of support from the staff for logistical support and the use of the facilities.
- *Communications.* In order to be effective, the existence and mission of small group ministries need to be broadly communicated to the membership in a sensitive manner, depending upon the nature of the group.

*Things to think about:*

- In all congregations there is a constant struggle between what they want to do and what they can do. As a result, there may be many more ideas than can be implemented. There must be alignment between the ends statements and the affinity groups. The staff should develop a procedure to identify those groups that will be

supported with the resources of the congregation.

## VIII. Management

Strong management of programs, people and resources is essential. There were a few common features that we observed in several programs and would describe them as "best practices". First, there needs to be clarity about and a strong commitment to the mission of the program. When a clear mission is in place and is clearly articulated, it allows all staff involved in programming to stay focused on program objectives and to resist the temptation to be all things to all people. Secondly, there must be a shared accountability for accomplishing the goals of the program. The success of such programs is never the responsibility of a single person, but requires the commitment and accountability of many. Thirdly, we observed that successful programs bring out the best in their staff by leveraging each person's unique talents and skills. There needs to be a balance between hiring with specific criteria in mind and having the various positions evolve based on the unique talents and strengths of each staff member. Finally, a willingness to be creative and flexible is also required.

Other features that we observed in one or more programs include:

- Organizing the work of the congregation by Ministry Teams (Atlanta/Appleton/San Diego). See "Organization and staffing recommendations" below.
- Frequent interaction across ministries - This includes both regularly scheduled formal meetings and on-going informal communication.
- Creative use of extra resources
- Use of Lay Ministers (volunteers who serve as mid-level managers and are treated as staff with similar responsibilities and accountability - Atlanta)
- Use of Interim Ministers from local Divinity Schools to assist with programs (Atlanta)

*Things to think about:*

- There are several area divinity schools. Consider establishing a relationship with these schools and providing opportunities to divinity students to serve as interns, overseeing specific task areas of the fellowship.

## IX. Supportive Practices

Supportive practices such as use of technology and organizational structure are included in this report as they are important strategies to simplify, expedite and support communications within a congregation and across its membership.

### *Use of Technology to Manage Interactions - E-mail*

E-mail is a way to quickly and easily keep others informed and involved. The use of e-mail can be particularly effective in communicating regularly with RE parents and teachers and was noted in several congregations. Atlanta makes use of an RE teacher feedback form. When teachers arrive each week to their classroom, there is a notebook waiting for them. The notebook contains updated weekly lesson plans, an updated class roster and attendance sheet and a form for the teacher to complete at the end of class to communicate the classroom “Highs and Lows” of that week. Forms are collected and summarized in a weekly e-mail to all RE parents and teachers.

Appleton has a similar approach of collecting and summarizing RE teacher feedback forms. In addition, RE teachers are sent an e-mail mid-week to remind them of the upcoming lesson plans and what they can expect to find ready and waiting for them when they arrive in the classroom.

San Diego has a monthly e-mail called Home Connections that is sent to all members of the congregation. It highlights the next months worship services and RE themes and includes suggested readings and family discussion topics. A weekly calendar is also e-mailed to all in the congregation.

E-mail can also be used as a way to stay connected with individual members of the congregation. The Director of Membership in Atlanta sends out a personalized communication to every member of the congregation at least once a quarter.

### *Use of Technology to Manage Interactions – Websites*

The congregation’s website is vitally important mechanism for communicating information both to the membership and to the broader community. We strongly recommend that website design, functionality and purpose be clearly defined and professionally developed. The value of a well-developed website can not be overstated and this is an area in which use of free lay volunteers is not recommended as a best practice. Atlanta conducted multiple focus groups to clarify the needs and purpose their website would serve. A consultant was hired to design the website and the results have been extremely positive; it is neither cumbersome to maintain or use.

We saw many impressive examples of how websites are being used to communicate UU principles and values, welcome seekers and new members, and most importantly convey current information to members of the congregation. Simple examples include: a calendar of events that is updated daily and in some cases links to a brief description of the class or event (Pasadena); the use of interactive media, such as embedded video clips of the minister speaking about the stewardship campaign (Atlanta), or members speaking of what the membership means and how their lives have been changed (Pasadena); information about congregation themes or upcoming worship services with ideas and tools for creating family conversations, rituals and individual practices around that theme (Pasadena). Blogs are also gaining popularity. Westminster and King's Park have youth blogs, Pasadena blog is more adult focused. Madison’s Minister of RE maintains her own blog

available to the congregation.

Ongoing oversight and management of the website is often the responsibility of the Director of Membership, which seems to be fitting responsible for this role.

#### *Use of Technology to Manage Interactions - Software management tools*

While we saw several software tools being used, the All Church Software at Atlanta appears to be among the best. This tool is user friendly and has the ability to manage the church directory, all interest and affinity groups, as well as mass e-mail management.

#### *Use of Multiple Communication Venues*

Using multiple venues for communicating information is also recommended. Web and e-mail communications will likely not replace clear and readily available printed materials, such as Atlanta's and San Diego's weekly newsletter highlighting that week's events and announcements (they do not use the order of service to post such information). Adult programming at Appleton, Pasadena and several other congregations is in a printed catalogue. San Diego has created a comprehensive Team Ministry handbook, with programming and events organized around the ministry teams. Appleton's foyer has a rack with informative brochures and materials related to UU'ism in general and specifics about the congregation, worship services, and programs. Appleton has also printed a refrigerator magnet listing the time, topics and phone number to call to register for its Fellowship Wednesdays. Many, if not most of these materials are also posted as a PDF on the website.

#### *Creating Structure that Supports Purposeful Communication between Staff and the Congregation*

As ERUUF moves toward organized ministries teams, a priority should be given to establishing a clear and structured communication plan within and between ministry teams. Atlanta has done an especially good job of creating and purposefully implementing a communications plan. They use e-mail frequently with each other, but also hold face-to-face meetings regularly, "We meet all of the time and this is the best way to keep everyone looped in to planning, etc."

## X. Organizing and staffing

### Vision Quest Team Staff Recommendations *Searching for Best Practices in Lifespan Faith and Spiritual Development for ERUUF Eno River Unitarian Universalist Fellowship*

The mission of the Eno River Unitarian Universalist Fellowship is to transform lives by building a free and inclusive covenantal religious community of spirit, service, justice, and love.

*As presented to the executive team, December 17, 2008*

Note: Unless specified as “paid” or “volunteer”, “staff/staffing” refers to both paid and volunteer staff

The best staffing scenarios existed in which five key components were present:

1. Collaborative, team-oriented staff structure
2. Clearly defined roles and reporting structures
3. Clear and shared accountability for reaching “ends”
4. Regular, frequent and clear communication among all staff and the congregation.
5. Trained and nurtured volunteer lay leadership

The VQT believes that these components are successfully achieved and maintained where MINISTRY TEAMS are utilized for performing the functions necessary to carry out the shared vision and mission of the fellowship.

#### Organized MINISTRY TEAMS

The most effective fellowships organized paid and volunteer staff around a ministry team model that is aligned with mission and end statements.

An example of how this might be organized at ERUUF would involve ministry teams around key components of the mission statement:

Service to the larger world (JUSTICE): social justice; denominational affairs; out reach

Stewardship of resources (SERVICE): volunteer staff, donations, house and grounds, technology

Community Life (LOVE): communications, membership needs and interests, pastoral care

Lifespan Spiritual Growth and Learning (SPIRIT): adult, child, youth, ERUUF leadership

Worship and Program (SPIRIT): Sunday service; Wednesday service, music

Ministry teams and councils of Ministry teams meet regularly to coordinate across areas of interests/ends.

## STAFFING RECOMMENDATIONS

The best practices for staffing we investigated assigned paid and volunteer positions to ministry team areas. For the purposes of this set of recommendations, we have used the example ministry team scenario outlined above (see underlined ministry team names). As the result of our research, the 3 fellowships we found to best exemplify this model are: First UU Sand Diego, UUCA in Atlanta and Fox Valley in Wisconsin. There are others out there doing this, but these three were the most available to us for research purposes. They are all also very similar to ERUUF in terms of size.

Note: It is important to note that all effective management teams spoke of the importance of using flexible staffing practices. A tightly defined job description may prevent outstanding candidates from qualifying for a particular position. It is recommended that with each job description the responsibilities be prioritized, both based on the needs of the fellowship and skill of the staff in place. Similarly, the happiest staff were those who felt there was some flexibility in responsibilities as interests and talents shifted and changed amongst the staff.

Lead Minister, full time (paid)  
Service to the larger world  
Worship and Program  
Community Life  
Stewardship of resources

Assistant Minister of Lifespan Faith and Spiritual Development, full time (paid)  
Lifespan Spiritual Growth and Learning  
Community Life

Director of Children, Youth and Adult Lifespan Religious Education, full time (paid)\*  
Lifespan Spiritual Growth and Learning  
Community Life

Youth Coordinator, 1/2 time (paid)  
Lifespan Spiritual Growth and Learning  
Community Life

Coordinator of Adult Religious Education, 1/2 time (paid or volunteer)\*\*  
Lifespan Spiritual Growth and Learning  
Community Life

Lifespan Assistant, 3/4 time (paid)  
Lifespan Spiritual Growth and Learning  
Community Life

Membership Director, full-time (paid)  
Community Life  
Stewardship of resources (volunteers)

Music Director, full-time (paid)  
Worship and Program

Children's/youth choir director, 1/4 time (paid or volunteer)\*\*  
Worship and Program

Social Justice Director, 1/2 time (paid or volunteer)\*\*  
Service to the larger world

Executive Director, full-time (paid)  
Stewardship of resources

Communications Assistant, 1/2 time (paid or volunteer) \*\*  
Stewardship of resources  
Community Life

Administrative Assistant, full-time (paid)  
Stewardship of resources

Book keeper, 1/2 time (paid)  
Stewardship of resources

Facilities Manager, 3/4 time (paid)  
Stewardship of resources  
Community Life

Total staff: 7 full time; 2 3/4 time; 5 1/2 time; 1 1/4 time

\*There are two possible structures around lifespan staffing. In this one, a Director of Lifespan Religious Education is responsible for children, youth and adults. In another the DLRE is responsible for children, youth and families. This final decision should depend on the candidates recruited and lead staff preferences.

\*\*Lay leadership ministry program is recommended for recruiting, training lay leaders to serve as professional staff equivalents for some key function areas, where resources are not available and /or where talent and interests match requirements of the job.

NOTE: Other sources of professional staff include Ministerial internship programs and lay worship associates programs.

## XI. Next steps - getting started

*The search for wisdom is a great challenge; to act on wisdom is an even greater challenge*

*–Siddhaswarupananda*

*For ERUUF:*

While the report includes many programmatic options, we do not expect that ERUUF implement them all immediately. Below we have identified some immediate steps to take.

- Organize the staffing and work of lifespan faith and spiritual development in ERUUF around Ministry Teams.
- Use information in the report to develop a job description for the new DRE/DLRE. Use the report to inform any additional staffing decisions.
- Identify and implement a core set of curricula for children and adult Religious Education offerings. Consider Tapestry of Faith.
- Establish a structured program of volunteer management. Included in this is a clear recruitment strategy and a program of nurturance and development.
- Identify a high visibility initiative to show progress to congregation (ex. commit to creating Wednesday-night programming).
- Create a congregation-wide social justice initiative in which people of all ages can be involved.
- Adopt best practices approach to developing/improving initiatives at ERUUF (e.g., Atlanta has done extensive research in developing their new website).
- Develop a 5-year LFSD implementation plan with targets for accomplishments for each year.

*For the Vision Quest Team:*

Execute an agreed upon communications plan for the recommendations:

- Communicating with ERUUF congregation and leadership
  1. Article for Currents
  2. Present to Exec. Team, Leadership Forum, RE committee
- Communicating to other congregations
  1. Send report and two grids to participating congregations
  2. Send materials to Sue, Stefan, Gail
  3. Share information with denominational affairs (Nancy Henley)
  4. PDF of program and staff recommendations posted on ERUUF website.

## Appendix

### I. Research and Summary materials generated by the VQT

- One tab for each of the 14 programs researched containing printed materials gathered about or from each fellowship (**Tabs 2-15**).
- Summary Grid of the 14 UU congregations researched (**Tab 16**).
- Non UU congregation fact sheets and summary grid (**Tab 17**)
- Tier One Interview Sheets (**Tab 18**)
- Faith Development Criteria Grid showing Tier One and Tier Two interview questions (**Tab 18**)

### II. Background materials used by the VQT (**Tabs 19 and 20**)

#### ERUUF specific information (**Tab 19**):

- ERUUF mission and end statements
- Adult education research results – conducted by ISES (Richard Laxar)
- Appreciative Inquiry wishes by category grid
- Definitions of faith development from RE retreat (1/08) and district (provided by Sue Sinamon)
- RE Visioning Retreat report (1/08)
- Mission statement of lay-led lifespan development initiative, spring 2006
- Results from ERUUF youth conversations retreats
- Questions from RE committee members

#### Distict/UUA information (**Tab 20**):

- UU principles and sources
- Julie Edmunds notes from large congregation conference
- Lifespan Faith Development report to the UUA Board of Trustees, April, 2008
- Summary of Essex conversations
- Tapestry of Faith

#### Other Lifespan Faith and Spiritual Development Resources