



**Taking Stock: Perspectives for Growth**  
**First Universalist Unitarian Church, Wausau, WI**  
**March 7, 2008**  
**Ian Evison and Patricia D'Auria**

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## **Background**

First Universalist Unitarian Church completed a major building project in fall, 2007. While the capital campaign and subsequent building renovation project were very successful, there were reservations on the part of some contributors which became apparent upon completion of the project.

First UU was founded in 1870, and has a strong historical place in the community of Wausau and in Unitarian Universalism. Members of First UU have reason to honor their roots even as they grow new shoots and branches. In 2001, First UU called a vibrant, youthful minister to serve their community. The Ministerial Search Committee had been charged by the Board of Trustees and the congregation to seek a minister who would bring youth and vitality to their aging community. The Reverend Paul Beckel answered the call and has fulfilled the charge in spades.

Paul's Services are lively and engaging, even theatrical. His tenure has brought many new members to the congregation. Most of these are younger families with children. Enrollment in the Religious Education program has grown significantly. For most members of First UU, things are great! They love Paul; they love the worship services; they love the RE program; and they love the new building.

However, for a significant minority of First UU membership, things don't feel right. They, too, love the new building, they are happy to see so many young people--including children--and they like Paul. In this second group, there are concerns about propriety in the care of the new building; Paul is seen as irreverent and not spiritual enough; and there is a desire for more (and clear) guidelines about many aspects of church life.

In any congregation, such diversities of perspective and needs offer opportunities for discussion, disagreement and growth. Unfortunately, First UU has struggled to find healthy avenues for this processing work. There is clearly an important discussion about the future direction of the congregation and its ministry that needs to take place. Some policy manuals are sorely out of date and there are no clear guidelines for building care and maintenance. The use of a listserv email as a primary venue for difficult communication has been most damaging.

It is entirely appropriate and timely for First Universalist Unitarian Church to seek consultation.

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## **Process**

The Board of Trustees and the Minister invited consultants from the Central Midwest District to offer a series of “listening sessions” as opportunity for all who wished to participate to be heard in person. The focus of these listening sessions was established in conversation with the Board. The focus of each listening session would be to hear participants’ thoughts about the current situation of the congregation and ideas about how to move forward.

Four listening sessions were held at First UU church on Friday, February 16<sup>th</sup>. The first of these was with staff and included: Rev. Paul Beckel, Samantha Masterson, Kathy Schmirler and Marguerite Donnelly. Next was a meeting with Rev. Beckel and his wife, Jane Beckel. Third was with members of the Board of Trustees, including: John Robinson, Brad Lanzer, Marsha Fitzgerald, Greg Zavadoski, Sheryl Hemp, Eileen Gavin, Liz Barr and Suzan Miller. Deb Hartmen was not available on Friday, and participated in one of the listening groups on Saturday. Fourth was a group of nine congregation members.

Seven groups of congregants met at First UU on Saturday, February 17<sup>th</sup>. An additional group was held via phone conference the following Monday. A number of people submitted written material.

In addition, the consultants read Board of Trustee minutes, First UU’s Annual Report, the 2005 Feasibility Study, which was part of the decision-making process leading to the building project, several issues of the church newsletter, *The Circuit Writer*, and other information from the First UU website.

### **Three Frameworks for Understanding: Generational Differences, Congregational Size Transitions, and Conflict**

Key to the success of this process was listening to people in a setting where people could also listen to each other. Overall, the conversations each tended to represent a good range of views. People expressed themselves forthrightly, and people listened to each other with respect, empathy, and desire to expand their understanding to embrace differences. The listening session with the Board showed that they well-represented and well-understood the views of the larger congregation.

These were remarkable conversations. Many people entered these conversations feeling some mystification about and alienation from views that differed from their own and ended feeling that the full range of views was humanly understandable and expressed the values and needs of those who held them. When asked what needed to happen for the congregation to move forward, many people said ‘have more conversations like this.’

The time constraints did not allow these conversations to develop fully. Yet in many of them a depth of mutual understanding and wisdom emerged—especially in those groups that held the broadest spectrum of viewpoints.

Three frameworks of understand emerged—one concerning generational differences, one concerning congregational size transitions, and one concerning conflict.

### **Generational Issues**

As participants in their listening sessions interpreted the recent experience of the congregation, one explanation used by many was that the congregation is experiencing a conflict of generations both within the congregation and as a reflection of shifts in the Wausau area and the larger culture.

It is important not to over-generalize about the distinctions. There were older people who like the services very much, who find the new relaxed spirit in the congregation refreshing, and who find Paul an excellent communicator with a rare gift for going beyond the lecture-style sermon. There were younger parents who were uncomfortable with occasional profanity from Paul. They also wished for the congregation to take on the hard question of norms for the church family. Many participants seemed to have mixed feelings.

To the extent there was a generational divide, the greatest tension was less between the elders and the young adults than it was between a group that might feel itself to be the “responsible” and the emerging young adult generation. In a pattern quite typical of other congregations, the strongest tensions were between the generations closer to each other. Quite a few of the elders who participated were in turns concerned and a little mystified—they played the role of concerned grand parents in relationship to a tension between their children and grandchildren.

People of the “responsible” generation often felt stressed and stretched—both personally and financially. They celebrated the wonderful increase in children and younger adults and all that this promises for the future of the congregation. Yet, it sometimes feels that their needs for ministry as they moved into the second half of life were out of focus in the congregation. The program development of the congregation felt somewhat lopsided. Too often they had difficulty finding in Paul’s sermons what they considered to be the substance they needed to carry them through the week. And—equally important—it seemed that the younger members of the congregation (often as represented by Paul) had a hard time honoring things that are very important to this group.

This group feels itself necessarily asked to shoulder a disproportionate share of the financial burden until the newer and younger families grow into the ability and commitment to take a greater financial role. This transitional period feels awkward. Lacking straightforward conversations about such matters as norms for care of the newly refurbished building, casualness about its use can seem to express lack of respect and comprehension about what is necessary to care for the new building and support the congregation.

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The other group—mostly but not entirely younger—feels stressed and stretched in their own way. This new old church in the heart of the community is precisely what they want and need to give to their lives a sense of groundedness and meaning. Yet, at times they feel that they and their children are more tolerated than welcomed. While they love the beautiful historic church and come in part for the sense of meaning it gives them, they distrust the honoring of a history that at times pointedly did not honor them—be they younger, of the wrong social group, or gay. Allusion to the need to give deference to donors, can feel like a most uncomfortable throwback to an era of Wausau’s history when some people and families exercised a disproportionate influence and when this influence was exercised in ways that were less than open and democratic.

The forthright way in which people expressed themselves and worked towards mutual understanding in these groups is an excellent sign concerning the work that lies ahead. There is a truth in this that we know already and that is fundamental to our Unitarian Universalist faith. Expressing a disagreement may feel like it is causing conflict. Yet it is not. To do so with care and understanding, face-to-face and to stay to work through to a place of greater mutual understanding lowers the tension level, creates human bonds, and opens the space for organizational creativity.

This congregation has more than sufficient capacity to work past the sense of impasse that many are feeling. It will require encouraging and supporting the whole community in practicing good communication. It will require in specific situations, such as the matters regarding the use of the building, people who disagree sitting down and working through to win-win solutions and then honoring each other for this work. And, it will require open and transparent planning processes in which the congregation recognizes and plans for an increasingly diverse future in which a multiplicity of needs are recognized and met.

### **Size Transitions**

Many participants suggested that the congregation is experiencing “growing pains”. First UU is clearly growing, and has not to date had a framework for understanding about how congregations grow.

The most important overall theory about how congregations develop and grow is the size transition theory. The crux of the theory is that as congregations grow they tend to reshape themselves into very different structures. As congregations grow—or decline—they tend to persist in their previous structural patterns, albeit with an increasing unease.

A family-sized congregation (0-50)—the smallest, often is built around a very few key families. The congregation has matriarchs and patriarchs and the way someone is established as a leader is by being adopted or otherwise recognized by them. If these congregations have clergy at all they are part-time. Whatever the organizational chart might say, the real **power** and authority lies with the leaders of key families.

The next sized congregation is the pastoral sized congregation (50-150). In such a congregation the pastor tends to be the center, holding everything together. The congregation’s ministry is what she or he does. At their best, pastoral-sized

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congregations often have one great strength. Positively, a successful pastoral-sized congregation is often a place that has figured out how to do one thing well. Negatively, a pastoral sized congregation is often a place that can't figure out how to do more than one thing well.

The next configuration is the program-size. This configuration tends to work well and naturally for congregations with between 150 and 350 active members. In this configuration, the primary work of the minister shifts from doing the ministry of the congregation to holding together and leading an increasing diversity of ministries. The separate ministries of the congregation—ministry of care, ministry of music, worship ministry, social justice ministry, life-span faith development ministry, and so forth tend to take on more of a life of their own with their own leaders and often supported by staff other than the senior minister. Excellence in ministry in a program-sized congregation increasingly depends on the ability of the minister in leadership development and planning.

There is nothing hard-and-fast about these transitions. There are ways in which each sized congregation tends to contain within it, psychically at least, congregations of the previous configurations. Sometimes the particular skills of ministers and the needs and wishes of a congregation dictate that some areas of a congregation's life in a program-sized congregation are still handled in a pastoral-sized way. If this works—and as long as it works, there is no reason to do things differently. However, the consistent experience of congregations is that with growth methods of doing things that worked well—that worked best—at an earlier stage, increasingly do not work.

If a congregation and minister attempt to drive too far into a program-sized church using pastoral sized methods the first result is burn-out and unease. If a congregation fails to heed these symptoms as an invitation to invent new ways of working, the result is unfortunate. The system finds for itself a solution, often in the form of a conflict severe enough to reduce the congregation to a size where the older methods again work well.

With well over 200 adult members, First UU Church of Wausau is in a stage of growth where it would be surprising indeed if there were not tension over maintaining pastoral methods of organization. Program-size skills and challenges such as leadership development and organizational planning have not naturally come into focus for First UU. Fortunately, as individuals, the minister and key leaders have considerable skill and wisdom on these subjects.

Particulars of the growth challenges faced by First UU were filled in as people in the listening groups discussed different areas of the church's ministry. Frequently, these discussions were framed entirely in terms of what Paul did or did not do and how well he did it. For example, concerning the congregation's ministry of care: many people spoke eloquently about the amazing and wonderful ministry of care Paul had shown to them. Others spoke about Paul's clumsiness in this area or how he had failed entirely to respond to a clear pastoral need. There was little focus on how perhaps the ministry of care of the congregation should be something more or different from what Paul did or did not do. Or that Paul's primary accountability in this area of the congregation's life might need to shift to leadership development, organization, mentoring, and coaching.

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The fact that there has been a Care Committee, but that it is not currently active, is an example of the challenges faced during transitions in size. Institutionally, an active Care Committee indicates a recognition that the ministry of care must be larger than the person of the minister. There are many people at First UU Wausau who are deeply knowledgeable about the provision and organization of human services. Clearly, this is an area of growth for which that First UU is well prepared.

The challenges to ministry and organization posed by growth are both wonderful and deeply distressing. They require a congregation to respond to these challenges with patience and grace. Pastoral-sized styles of working are likely to become increasingly counter-productive, and maintaining them will lead to increased tension. The fundamental choice before the congregation is to intentionally recognize and embrace the dis-ease and to employ creative, collaborative strategies for problem-solving.

### *Changes the Minister Needs to Make in the Pastoral to Program Transition*

When asked that the congregation needed to do to move forward some people tended to frame their answer in terms of what Paul needed to do—how he needed to change. Overall, we are encouraging First UU of Wausau to see what needs to happen in a larger frame. Paul and the congregation are running into challenges that likely would have been inevitable whatever the skill set or professional qualifications of the minister. And, if you judge Paul by the success of the institution he has led, his success is notable. Your congregational growth has outperformed the denomination by multiples.

Yet, from one angle the focus on Paul is quite appropriate. Often the most difficult part of the size transition from pastoral to program is renegotiating the role of the minister. And, the theory of size transition was in large measure developed from the distressing observation that ministers who succeeded in congregations of one size often failed in larger congregations.

A larger size of congregation requires not just new and additional skills but also contradictory skills. Successfully ministering in a larger congregation requires unlearning some of the skills that worked best in a smaller congregation. For ministers, the transition you are making—between a pastoral and program sized—is especially difficult.

In a pastoral-sized congregation the minister is the ministry. What else would it be? The preaching is what the pastor does. The pastoral care is what the pastor does. If RE is something more than what the pastor does, it is only because nobody has figured out how to have her or him do both at once on a Sunday morning. And somehow organizing other people to do things is not quite ministry and the congregation is not quite sure whether and how the minister should be part of the organizational life of the congregation.

In this transition, ministers often feel like they are losing their ministry. And they are in a sense. People go into ministry because they like hands-on helping of people. Few go into ministry because they like training other people to do pastoral care and even fewer go into ministry because they like figuring out the budget for it. But this is the kind of

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transition Paul is going to need to make and he will need congregational support if he is going to succeed as well in the next seven years as he has in the past seven. Quite a few people mentioned feeling a combination of wonderment, appreciation, and discomfort with the amazing hands-on role Paul took in the building renovation. To a minister who feels her or his role shifting to more of a program management orientation it can be exceptionally satisfying to take a direct role in such a time-limited project. Yet, overall, it is likely that such styles of involvement need to become more the exception than the rule. Letting go of this can be very hard because the energy of this direct involvement is often what motivates the most capable and idealistic people to pursue the calling of ministry. Yet as Paul and the congregation work together to invent new ways of doing things, it is quite likely that Paul is going to need to let go of a considerable portion of what has been the most satisfying stuff. And it is likely that he will need to turn himself increasingly to areas like leadership development, board development, and planning. The point of primary accountability is likely to need to shift from how he does things to how he leads, coaches, and mentors others in doing the direct ministry.

Another research finding that applies here regards long-term ministry. The Alban Institute studied long-term successful ministry and found that successful long-term ministries are generally made up of a series of very different ministries of about seven year's length. The original idea for giving ministers sabbaticals and giving them approximately every seven years comes from the finding that to be really successful for a period longer than seven years ministers need to substantially reinvent themselves.

## **Conflict**

We heard some of you—quite a few of you—say you were afraid the church was in conflict. You are—and that is good. It may not feel good, but it is.

### *The Levels of Conflict*

The most important theoretical framework applied to conflict in congregations is the theory of the five levels of conflict developed by Speed Leas of the Alban Institute about twenty years ago. These levels go from level one which is somewhat heated discussion, to level three in which people seriously begin taking sides, through level five in which the original reason for the dispute is often lost and people start seeking seriously to cause each other harm. For you, the important part of this framework is something that Speed Leas added just in the past decade. This is Level Zero Conflict. In congregations that have previously had bad experiences with unhealthy conflict or who are culturally averse to conflict, it becomes hard to have difficult conversations at all.

The Upper Midwest and especially the historic congregations of the Upper Midwest are the heartland of zero level conflict. Many of you said it straight out: "I hate conflict." This is tough. In an era when change is hitting congregations ever faster, these congregations are finding it very hard to keep up because they have not learned how to

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make space for the healthy conflict they need to have. In such congregations, even to hear the words “healthy” and “conflict” in the same sentence makes no sense.

When important disagreements are pressing to the surface in a congregation averse to conflict, the disagreements tend to manifest themselves with a bang. People go directly from saying nothing to distancing themselves from those with whom they disagree. In a conflict averse relationship the parties find it hard to linger in or feel comfortable with the embrace of a passionate disagreement. Thus, conflict averse groups tend to go very quickly from most people not knowing anything is happening to being right in the midst of something very uncomfortable.

The second thing that tends to be true in a conflict averse congregation is that it is very hard for the group to honor and appreciate those who bring forward the issues that need to be worked. When conflict does arise—if passionate opinions are expressed passionately—there tends to be a high expectation on leaders to accommodate, to put oil on the waters. Moreover, to the extent that such congregations do work conflicts they try to do so in ways that are as dis-passionate and distanced as possible—they tend to favor forms of expression shorn of everything besides the flat statement of opinion and argument.

Here is a strange paradox: when a conflict averse organization moves to lower the tension by accommodating or forcing a dis-passionate discussion, it can inflame things. People who reach out passionately to engage can experience accommodation not with gratitude at getting their way but with frustration at what is experienced as a refusal to engage. As for trying to force a passionate conversation into a dispassionate modality: this can be good. But it can backfire. Paradoxically, when you press passion out of a passionate argument either by forced rationality or by arms-length communication, people tend to respond out of their worst fears. In this congregation, electronic communication has been a vehicle for such dispassionate communication. It has not served you well.

### *Resources Conflicts vs. Identity Conflicts*

The first conflict paradigm introduced was that of Speed Lea’s levels of conflict. The second paradigm is the distinction between resource conflicts and identity conflicts.

One of the things we heard over and over again is that people were incredulous that such seemingly small things could have become such big issues. How, with all the things going well here—a fabulously successful capital campaign, a renewed building, a marvelous RE program—filled with children and young families, could some be feeling such discomfort? How could there be such strong feeling about what seem to many as small issues of style? Even some of those who expressed the objections, seemed somewhat sheepish that such things could matter so much.

One thing that can help us understand what is happening here is the distinction between resource conflict and an identity conflict. Resource conflicts tend to be the ones that makes sense us and that we know how to solve. There is a resource—let us say an apple. Two people want it. What should we do? Give it to one? Divide it?

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Conflicts like this are solved by figuring out how to divide the resources. And they are made better by having more resources and worse when resources are more scarce.

Identity conflicts are not like this. A classic recent example of an identity conflict from the work of Jay Rothman, is the question of the Confederate Flag over the South Carolina state house. As a resource, the flag is an insignificant bit of cloth. The dispute cannot be solved by figuring out how to divide the flag. And the conflict certainly cannot be lessened by having more flags. The flying of the flag only has significance because of the statement it makes about the identity of the state of South Carolina. Leaving the flag up says something about identity of the state. Taking the flag down says something else.

It is not possible to say that your conflicts are entirely or even primarily about identity rather than resources. Yet it is a tip-off that something might be an identity conflict when people find themselves mystified about how something so seemingly small could assume such a large importance. And it is a tip-off when part of the thing that catches is how something is going to appear in the larger community. As a test of which it is primarily for you, we ask you this: would two services be a solution? Would it be fully resolved if there were here—as there are in many places—two services, an earlier one that is more traditional and a later one that is less; an early one where silence is observed at the opening of the service and a later one where the hum of quiet conversation is considered part of the prelude?

Do you say to yourself, “yes—if there were enough resource for both—that would solve it?”

Or, do you say to yourself, “perhaps, but somehow a solution like that partially misses the point.”?

Do people say I want this place to be more reverent or to be more relaxed? Or do people say that I want there to be a place or a time when I can be more reverent—or more relaxed?

In general, program-sized congregations need to find ways to build identities that are more comfortably multiple.

### *Conflict in a Pastoral-Sized Congregation*

A congregation operating in a pastoral style tends to make everything about its pastor. This is true for what is going well. This is true for what is not going well. In the case of conflict, this is true too. When a pastoral-style congregation has a conflict, the conflict tends to take place through, about, and around the pastor. The strengths and limitations of the pastor tend to become the language that a pastoral congregation uses for its disagreements even if the core of the conflict is only peripherally related to the minister. Disagreements over the style of the minister becomes the form in which the congregation debates its style. In a conflict averse congregation, this tendency is magnified. It can feel more comfortable to disagree about and through the minister than directly with each other. Ministers can feel in such a situation that they are responsible for somehow synthesizing the differing views. They can feel that they are having within

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their own guts the congregation's struggles over who and what it should be—and they are. It hurts, and is unproductive. The person of the minister can not be all to everyone.

The minister, in partnership with the board and other lay leadership, needs to take an active role in helping the congregation to have the discussions it needs to have in a healthy way.

## **RECOMMENDATIONS:**

### **Discernments and Suggestions**

As the information gathered on behalf of First UU was reviewed and **discussed, four** categories of interest emerged. These were: Communication, Ministry, Planning, and Governance. Following is a discussion of the perspectives offered and understanding gleaned regarding each of these categories.

Within all these recommendations it is important to hear this dual message: this is a wonderful congregation with a wonderful minister AND to move to the next stage both are going to need to grow develop in fundamental ways. Holding the tension between the two parts of this truth will at times be challenging and uncomfortable. Yet learning to stick with this challenge and discomfort will in the end be more productive than any effort to seek quick relief.

#### **Communication**

First, and important to note is the fact that human beings tend to suffer a natural let-down after a period of rigorous activity. First UU has been engaged since 2001 in a series of changes which have been exhilarating and draining, and between which there has been hardly a pause to relax and reflect. These changes include, but are not limited to: the hiring of a new minister, the restoration and revival of the religious education program which involved the replacement of an RE Director, and a major building renovation project. Increased congregation membership is a change resulting from the more active changes.

An enthusiasm train has been rolling along and unfortunately, rolling over those who wished to rest and regroup before moving on. The bad news here is that some people have felt dismissed and unheard when they have communicated their concerns. The good news is that virtually everyone is interested in and willing to do the work of rejoining and reconciliation.

The listening sessions were a first step. The number of members who made the commitment to participate and spoke their truth, often within a group of people they did not know well, was quite remarkable. The prevailing wish was to understand and to make right what may have unintentionally gone wrong.

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One impression that had been carried was that there was a generational divide between young families and older members. As it happens, this is not what became apparent in the sessions. Rather, there are highly satisfied members from all generations, and there are younger and older members who express concerns.

One pervasive concern across generations and perspectives was the recognition that the church listserv, “uuwausautalk” was not a useful vehicle for communication.

For the congregation to stabilize, more direct and productive communication tools and skills will need to be developed. We recommend that in the next period the congregation do as much of its work as possible through face-to-face rather than indirect communication: people sitting in a circle speaking to each other rather than through a list serve or a survey. We recommend further that the congregation first work to learn and then develop the capacity to teach effective communication in diverse communities. This is a skill much needed in the congregation and for the congregation to serve its wider mission.

**Recommendation #1:** That the congregation avoid using its list serve as a means of debating, or offering opinions on emotion-laden subjects. The best use of this list serve is for limited sharing of information of interest to the entire congregation.

**Recommendation #2:** That the congregation sponsor a workshop on healthy communication and, in particular, on how to have difficult conversations in a proactive way. The congregation should do this in such a way as to develop its own ability to sponsor and conduct such workshops in the future: as part of adult education, as part of religious education, as part of leadership development, and as part of community service.

**Recommendation #3:** Make the core of all important work for the congregation face-to-face discussion across the greatest possible breadth of viewpoints. This needs to be the heart of any planning process that you use. This needs to be the heart of any Ministerial Advisory Committee or Committee on Ministry. This needs to be the heart of how you develop norms for all aspects of your common life, including how you live in your new building. Adults need to do this. Children need to see the adults doing this. Children need to learn how to do this. You need to be able to project into the community that you are a group strong enough to do this.

## Ministry

Ministry at First UU church is both wildly successful and troubling. As the congregation’s called Minister, Paul Beckel has met and surpassed the charge to grow the congregation and to enrich the community with children and young families. Paul is a man of great enthusiasm, who clearly loves his work and the members of his congregation. Since his arrival in 2001, Paul has participated actively in each and every aspect of the growth and change inspired by his presence. In the listening sessions,

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there were many congregants who were in awe of him and concerned that he worked too hard and gave too much to the church.

In spite of the fact that the congregation is clearly growing beyond a pastoral size (50 to 150) Paul's service has remained "pastoral" both in the ministry expected of him and the ministry he does. Pastoral congregations are small and intimate, and the minister is at the center of activities and responsibilities. When congregations begin to grow in size, as First UU has grown, there is simply too much for one person to do and to know.

At this juncture, wisdom requires a shift in perspective from the minist**ER** to minist**RY**.

In growing congregations, shared ministry is the vehicle for deep and meaningful experience. While the term "shared ministry" may sound new, it's already happening at First UU. Samantha Masterson's RE role is a ministry. Members of the Board minister to the congregation and to each other. Coffee servers are ministering with every cup.

So, the shift invited here is in consciousness. Ministry is broader in scope than just the minister. It is basic to UU faith that we are each responsible for creation of the spiritual path we walk. So, the minister is a touchstone rather than a guru. Shared ministry actualizes this aspect of our UU faith.

Through the lens of shared ministry, the strengths and weaknesses of a called minister pose creative challenges for the congregation and the minister to work together in mutual respect and shared responsibility for meeting the needs of the congregation.

Shared ministry does not mean that a called minister can stagnate. Professional ministry is a dynamic calling. The Alban Institute studied successful long-term ministry and found that these ministries were generally made up of a series of very different ministries of about seven years' length. Paul Beckel is in his seventh year of ministry with First UU. There is opportunity now for his ministry to grow.

**Recommendation #4:** The Ministerial Advisory Committee needs to be reconstituted into a Committee on Ministry. Its primary function needs to be helping the congregation have the difficult conversations it needs to have on how things are going. The focus should not be conveying anonymous criticism to Paul. The standard of evaluation should be the goal of the congregation for the ministry in question. So, the question should be, for example, how is the congregation succeeding with its goals of adult faith development. Within this, the committee must be able to honestly and forthrightly discuss Paul's contribution to this. This committee also needs to be ready to have the difficult discussions about the success of the ministry as a whole including the contributions of lay people to this ministry.

**Recommendation #5:** Paul needs to find a mentor. This should be a senior minister who has served both a pastoral and a program sized congregation. Ideally it should be someone who has navigated the shift in roles within a congregation that has grown from one size to the other.

**Recommendation #6:** The congregation needs to focus on leadership development. We recommend that the nominating process for key positions be broadened into a leadership development process. A leadership development committee needs to be formed and they should begin their work by looking at congregations where this committee takes a strategic and long-term approach to its work. Paul should not dominate the work of this committee but he—and increasingly other staff—need to work closely with it.

## Planning

There is a sense in which for much of the past decade the planning function of the congregation has been superfluous. Paul was called to the congregation with a charge to bring youth to the congregation. Much of the work of the congregation has been to make space for this and to support this. In this context, planning—the generating of other priorities could even have been a diversion. More recently, the building project has provided a similar singular focus. For this exceptional project to succeed the resources of the entire congregation—and the entirety of Paul’s attention—needed to be focused on this. Again, there was wisdom in not giving attention to work that would generate other priorities.

Now the situation has changed. As a congregation that needs to move into a program-sized orientation, the work of planning for an increasingly diverse congregational life is vital. People need the assurance that, even if their need is not getting priority now, that it will. People need to see that there is a healthy and appropriate place to bring the discussions of differing needs.

There has been a planning process but this process has not yet found a healthy and energetic place within the congregation’s life.

**Recommendation #7:** The board of trustees needs to take the lead in recommissioning the planning process. The planning committee needs to include people of a diversity of views and needs to make a central feature of its work collecting information through open face-to-face discussion among congregation members. Paul should not lead the planning work but he should take a strong role in it.

## Governance

We heard opinions along a broad spectrum on the subject of governance. On the one end, there is a view that the congregation is the employer and boss of the minister. On the other, that the minister is, or should be, the CEO of the congregation. (None of these opinions were expressed by the board or by Paul.) To some extent matters might be clarified either with reference to the congregation’s by-laws or to best practices in other UU congregations. However, it is unlikely that this will clarify matters entirely. By-laws are—or need to be—evolving documents and what is most desirable in the way of

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structure tends to be quite size-dependent. And, there is no one UU set of standard or best practices to which one might make appeal. Excellent well-run congregations take differing approaches to governance.

**Recommendation #8:** We recommend that in the Fall of 2008 the board appoint a task force composed of 4-6 people including 2 board members to consider how within the congregation the present mode of governance is working well and is not working well and also to interview the senior minister and board chair of two other UU congregations of membership of over 300. Paul should have a strong role in this process, but the congregation through the board needs to own it. This needs to be a group that the board appoints to do a task. We encourage the board to invite the minister and president of one such congregation to meet with the First UU task force. The task force should hold open meetings at least twice during the year to share with the congregation what it is learning. In Spring of 2009 the task force should report to the board its findings along with specific proposals for any changes in the governance of the congregation. The board should host an open meeting to discuss these proposals and then make a decision on recommending or revising them. These recommendations would then be offered for a congregational vote.

This is an important issue for the congregation but it is not the issue of first importance. In general work on this is likely to go better if other issues such as the problems of communication and some of the generational tensions are tackled first. This congregation needs to take special care not to think that other matters such as congregational identity and priorities (which imply priorities for the minister) can be indirectly resolved by working on governance. Quite the reverse is true. Progress is needed on other matters before general governance can usefully be approached.

There is one governance issue that will need to be addressed immediately. This is the relationship between the Minister, the Board and the staff. First UU is fortunate to have a hard-working well-coordinated staff. However, it is clear that the staff is often delayed or interrupted in efforts to serve the congregation by the challenge that virtually all decisions require Board approval. This requirement is inefficient and stress-producing. The Board needs to refocus its point of control from deciding about specifics to setting parameters for action.

**Recommendation #9:** It is important to clarify the role of the minister with regard to staff decision-making. It is recommended that the Board meet with the minister and staff to identify areas of autonomy for the Minister and staff.