



# UUCDC GROWTH THROUGH SERVICE

## LEADERSHIP INITIATIVE CONCEPT PAPER

### **WHAT IS THE GOAL OF THIS LEADERSHIP DEVELOPMENT INITIATIVE?**

Our vision is that the members of the UUCDC are vital, fully empowered partners in the church's ministry. This leadership development initiative is the tool to help members discover and release their full potential and to be transformed through service. The results are empowered, inspired volunteers who take on all levels of responsibility in order to transform our church, themselves and the community.

The objectives of the program include:

- progress individuals along their spiritual journey
- engage and embrace the entire congregation to be owners of the church
- offer a valuable program that assists in attracting and retaining UUCDC members

This concept for a congregation-wide leadership initiative for the UUCDC is presented for consideration by the Lead Minister, Lay Leadership Council, and Board of Trustees.

### **WHY IS SERVICE IMPORTANT?**

Service is a cornerstone of Unitarian Universalist identity, and of membership of UUCDC. Through service, not only do we play our part in healing our broken world, but we also find the opportunity to grow our own faith and spirituality, and to enhance our relationships with others. As Rev. Peter has said "Through service we not only make a valuable contribution in the lives of others, but we ourselves learn, grow and find fulfillment." Service can and should do all of that. That is, service can and should be a transformational experience. Those of us who have served in leadership roles at UUCDC will attest to this fact.

But service can and will only do all of that if it is fulfilling, feeds our passion, and grows our souls. That is the challenge for a leadership development program. If we can meet that challenge, our members will joyfully serve, gaining a deeper connection to our faith and our church. And, since our church is owned by its members and the potential for growth at UUCDC is limited only by the vision and willingness of the membership, joyfully serving members will move us closer and closer to fulfilling our Mission:

As members of a welcoming, religiously liberal community, we care deeply about each other, our children, our neighbors and our Earth. Together, we provide a haven for nourishing the spirit and mind, while we strive to build a just and sustainable world. We covenant to respect our differences, and to commit our time, our treasures and ourselves to this mission.

### **WHAT IS SERVICE CURRENTLY AT UUCDC?**

At UUCDC, opportunities to minister to each other and to serve the larger world abound, and sometimes the choices can seem overwhelming. We have organized these opportunities into five “Ministry Teams” that help to coordinate and facilitate our service choices.

We have a formal Nominating Committee that is elected by the congregation. Per our bylaws, the Nominating Committee is only responsible for filling open Board positions, the Lay Leadership Council (LLC) Chair, and positions on the Endowment Committee. All other positions are filled through an informal process conducted by the Lead Minister, the LLC Chair, and interested parties. And while we have tasked the Nominating Committee with filling these few important positions, we do not have a formal process in place to ensure that the Nominating Committee has enough information about the positions so they know in detail what is required of the position they are filling, including expectations and skills required.

Currently, the only positions that have term limits are the above mentioned positions – Board, LLC Chair, and Endowment Committee.

As far as understanding where interests (“passions”) lie, we have asked the membership to indicate their interest in ministry teams. About one-half of the membership has done so. While asking about ministry team interest is better than nothing, it is very broad, and we have generally found active participation on ministry teams to be weak and unenthusiastic.

The net is that the same people do the bulk of the work – until they burn out, that is.

### **WHY A LEADERSHIP PROGRAM?**

We need a leadership initiative that is designed to map service to leadership growth to spiritual growth and thus to UUCDC growth and vitality. We cannot sustain the programming that we need and want to fulfill our mission without broader participation in the programs and activities of the church. But maybe more importantly, we need to give everyone a chance to be transformed through service.



As we said previously, service should be fulfilling, grow our souls, and feed our passion. In our current system, this happens successfully, albeit

occasionally. We need to be intentional so that it always happens. We need to match passions to service opportunities. We need to set up each congregation member for success in their service role by clearly defining what success looks like when they start the position, and by ensuring they have the skills necessary to be successful. We need to create a manner of serving that is accessible to all.

Once we create fulfilling, well defined, transformational opportunities, members will not hesitate to ask other members to serve. They will know that asking another to serve is a gift they are giving to the other member, and not a burden they are imposing on them. Not only will our members benefit from the leadership development and want to continue on their spiritual journey, but the church will be powered by a collective energy and workforce to do the work of the church. Member retention (the “stickiness factor”) will improve. The reputation of the church will precede us, and increase the number of visitors as well as conversion to members. And our members will receive valuable skills and insights that are applicable to their roles and responsibilities outside of church.

### **WHAT WILL WE NEED TO DO?**

Our approach to this leadership development initiative involves ten steps:

#### **1. Morph Nominating Committee into Leadership Development Team**

The Nominating Committee will be changed into a Leadership Development Team, focusing on filling all service opportunities at every level in the church. The Leadership Development Team will work with both individuals to help them determine what service opportunities feed their souls, as well as with teams and committees to understand what service opportunities need to be filled.

#### **2. Create and Implement a Personal Planning Process**

To offer service opportunities that feed our passion, we first need to know where our members’ passions lie. Members have skills and experience that they bring. But more importantly, they have passions. Our goal is to capture those passions; so that we can offer them service opportunities that make them come alive.

Our 4<sup>th</sup> principal states that we affirm and promote the free and responsible search for truth and meaning. Thus, as UUs, we commit to being on a spiritual journey. Part of our journey is found through service. Our leadership development program will lead each member through a 2 year planning process that identifies how he/she plans to actively engage in his/her search for truth and meaning – a personal development plan. The one on one interviews occurring with each member every other year will capture the passions of the congregation member, and identify potential areas for service and growth. The trained team of interviewers (the “Leadership Development Team”) will be part of the Spiritual Growth and Enrichment Ministry Team. Since a personal development plan will include more than just service opportunities, the Leadership Development Team will work closely with the Adult Religious Education Team, the Small Group Ministry facilitators, and other applicable teams,

After two years, the Leadership Development Team will have met with each member, and then begin the process again. This time, the planning session will contain a review loop to provide feedback to the members to use in their development, and to obtain feedback on the leadership development process.

### **3. Define Term Limits and Other Policies**

In order for a service opportunity to be fulfilling for the congregation member, she/he needs the ability to be successful in her/his service role. It is incumbent upon us to set up each congregation member for success to the best of our ability. Part of defining what success looks like for a particular role is defining when the role ends. As such, we need to establish policies that define term limits for more than just the Board, the LLC Chair, and the Endowment Committee. We need a policy for term limits across all leadership positions (including ministry team leaders and committee chairs) at UUCDC. Term limits reduce burnout, ensure a rich set of experiences, and give the opportunity for new leadership – for other members to have the transformational experience and for new ideas to surface in that area. It is good for the individual and good for the organization as a whole. Time and time again, UU congregations and nonprofits across the spectrum have found that establishing term limits has helped with filling positions, not hindered it, as the commitment is more clearly defined and thus more manageable.

Another policy that must be established is around succession planning. The responsibility for succession planning must be clearly identified and defined. Our recommendation is that leaders, working with the Leadership Development team, be made explicitly responsible for finding and mentoring their own successors prior to their term ending. Passing the torch to someone new so that the work that you have labored so hard on is continued, and so that they may experience the joy of serving – the same joy that you have just experienced – is an honor and a privilege.

### **4. Develop a Standard Service Description Input Process**

Once we have the input from congregation members as to their skills and interests, the other half of the equation necessary to match members to service positions is the description of the positions. A standard form will be developed that asks for both the description of the position and responsibilities, as well as the skills necessary to be successful in the position.

### **5. Create the Needed Infrastructure**

The information collected in the personal planning process and the service description input process will need to be stored in a manner that is accessible to the leadership to facilitate the process of matching service opportunities with passions and skills. Part of the project will be to define the data to be captured, identify who needs to access the information and how they will go about it, and determine what technology will be best to use given the requirements we define.

## 6. Match Members to Service Opportunities

Based on the input from the Personal Development Plans and the Service Descriptions, the Leadership Development Team will work with church leaders to match individuals to service positions. Matching will be done with the goal of feeding passions and stretching members to get them out of their comfort zone for optimal growth. When matching a congregation member to a service role, the Leadership Development Team will facilitate the member obtaining the training necessary to supplement skills, as well mentoring relationships as part of ensuring success within the role.

## 7. Create Leadership Development Plan

Additionally, the Leadership Development Team will use the Personal Development Plans and Service Descriptions to create an annual plan for developing our leaders. The plan will identify the leadership training necessary and identify members to participate in the training. The Leadership Development Team will also submit the budget request for training.

Annual training will be varied and robust, taken at appropriate times for each member depending upon their service role and learning needs. Not only will the training help the member to be more successful in their position, but it is also extremely useful and applicable to their work and personal life. Some examples of types of training follow:

### Core Components

- UU 101
- UU 201
- Facilitating authentic conversations
- Developing insight and self-awareness
- Building trust
- Becoming deeply anti-racist/anti-oppressive/multi-cultural

### Subject area training:

- Stewardship (fund drives, fundraising, endowments)
- Worship Associates
- Small Group Ministry Facilitation
- Religious Education Teacher Training
- Youth Advisor
- OWL Leader
- Social Justice
- Music and Worship Arts
- Hospitality

### Leadership Training:

- Healthy Congregations
- Running effective meetings
- Budget management
- Cultivating collaboration
- Communicating a compelling message

- Responsibilities of a Committee Chair
- Responsibilities of a Ministry Team Leader
- Governing well (responsibilities of a Board member, UUCDC bylaws)
- Strategic planning/Working under a strategic plan
- Driving for results
- Leveraging transformational change
- Leadership as a spiritual practice
- Harvest the Power
- Policy Governance (Mission/Vision/Ends/Limitations)
- UUCDC Policies

#### Opportunities Offered by UU organizations

- Racial Justice Conference
- Jubilee Workshops
- Leadership Day
- JPD Spring Conference
- UU Leadership Training Institute
- General Assembly
- Conferences Based on Cong. Size

### **8. Implement Multi-Cultural and Multi-Generational Lenses into the Program**

The manner in which we conduct leadership development should further us in our goal to become a truly multi-generational and multi-cultural congregation. Attention should be paid to the barriers that are inherent in our approaches, and the appropriate changes made.

### **9. Educate and Effect Culture Change**

To achieve the most successful leadership initiative will require the entire congregation to feel they are the owners of the church and not consumers. We want members to be eager to serve and follow their passion and to be thankful to the person who did “the ask” that called the member to service as it has provided them with the chance to serve and through this experience, deepen their faith on their spiritual journey. Likewise, we want each person who is in the position of asking someone to serve (ministry team leaders, etc.) to know that the ask is a gift and leave behind their fear of asking. Additionally, understanding and embracing personal development plans as a tool to following our own spiritual journey is also a culture change. We need to build excitement about the program and encourage a new way of thinking.

### **10. Monitor and Feedback**

We want to measure the effectiveness of the program to ensure the program creates value for the congregational member. We will identify metrics that we can collect prior to the start of the program, and periodically at predefined intervals, including program usage, feedback, satisfaction ratings, cost, and other predefined metrics.

## **WHO IS PROPOSING THIS IDEA?**

Two church members working under the guidance of the Lead Minister have developed this proposal.

### **Jody Malloy**

Jody Malloy is the Director for Leadership Development in the Joseph Priestley District of the Unitarian Universalist Association. In this role, Jody consults with many of the 67 congregations in the JPD to assist with their leadership development efforts. Jody designs and delivers multi-congregation leadership training programs and conferences including such topics as “Adaptive Leadership” (from Harvard’s Ron Heifitz’s concepts), “From New Member to Board President: Growing our Lay Leaders”, and “Passing the Torch: Transforming your Nominating Committee into a Leadership Development Team”. Jody also facilitates Board and other committee retreats for congregations in the JPD. In our congregation, Jody has served as President of the Board of Trustees, a member of the Ministerial Search Committee, Chair of the Religious Education Council, and an RE teacher and mentor on several occasions. Jody has her Bachelors of Science in Economics with a concentration in Decision Sciences and Marketing from the Wharton School at the University of Pennsylvania. Prior to her UU work, Jody managed large information systems implementations at Fortune 500 companies all across the U.S.

### **Laurie Cooke, BSc, RPh, PGDip, CAE**

Laurie Cooke is the CEO of the Healthcare Businesswomen’s Association (HBA) which is widely recognized as the catalyst for the professional development and leadership of women in healthcare worldwide. Prior to joining the HBA, Laurie served on the executive management team at the Project Management Institute overseeing Career Management, worked in the pharmaceutical industry in progressively senior management positions, and as a pharmacist in both hospital and community pharmacy settings. Laurie has been attending the UUCDC for over 5 years and has participated in several initiatives including the ministerial search, the annual auction, and Coming of Age Mentor. Laurie graduated with a degree in Microbiology from the University of Maryland, an advanced scientific degree in Pharmacy from the University of Washington, and a post-graduate professional qualification in Software Engineering Management from the University of Luton, England, is a licensed Pharmacist, and a Certified Association Executive.

## **HOW WILL WE MOVE FORWARD?**

We foresee several teams, working under our guidance, focusing on ten areas detailed above. Different areas need different skillsets. For example, policies must be set in conjunction with our bylaws by our leadership. Determining the infrastructure necessary to house and access the data collected requires first working with our Administrator to understand the capabilities of and access to our current database. Effecting cultural change requires expertise in motivation, change management, effective marketing/communications. We are fully prepared to staff the teams and move the project forward, as detailed below:

Team	Resources Required	Timeframe	Skills Required
Leadership Development Team - <i>Creation</i>	Jody and Laurie	2 months	
Leadership Development Team - <i>Implementation</i>	5 members	2 years	Understanding of spiritual development via service; interviewing skills; understanding of training available at district and national level
Develop personal planning process	2 members	2 months	Understanding of spiritual development via service; creation of interview/survey processes
Develop Policies	1 Board Member 1 LLC Member	6 months	Understanding of UUCDC bylaws and policies; experience as UUCDC team/committee leader
Develop Service description	2 members	2 months	UUCDC leaders
Create needed infrastructure	1 members (working with personal plan and service description teams)	2 months	Basic understanding of technology and data storage, access and reporting
Implement multi-cultural and multi-generational lenses	1 person working with Jody and Laurie (or maybe just Jody and Laurie) and JPD/UUA resources	2 months	Knowledge of or interest in multicultural/multigenerational
Educate and effect culture change	3 people	6 months	Change management /organizational change/ culture change; marketing and communication
Monitoring and Feedback	Jody and Laurie	2 months starting about 1 year after project started	

### **WHAT DO WE NEED FROM YOU?**

We believe that the UUCDC is ready for the next step in its maturation as a vibrant congregation and ask that the Lead Minister, Lay Leadership Council, and Board of Trustees review and give approval to move ahead with a congregation-wide leadership program as described in this concept paper.