

Introduction

This list of questions was generated by the Presidents of the congregations of the Joseph Priestley District of the UUA at the President's Roundtable held in Media PA, February 13th, 2016. The questions were intended to be about the process of regionalization, but there were important questions asked about several different areas of the JPD. Questions have been grouped into two categories, Regionalization and Beyond. This document does not reflect the questions that were asked and answered in the room, only those that were submitted on index card after the meeting, although there was significant overlap. Answers were drafted by JPD District Executive, Rev. David Pyle, and vetted by the JPD Board of Directors Executive Committee. If you have any further questions, please send them to dpyle@uua.org.

Regionalization

If regionalization (and its associated savings) goes through, what will be the impact on congregational dues?

There is not an expected impact upon the overall amount of congregational dues as an aspect of regionalization. Regionalization is expected to result in more funds being made available for programming and direct services to congregations, by combining staff responsibilities, sharing overhead expenses, and reducing the cost of governance structures. The outcome we expect to see is expanded services and programming, as well as regional staff time and support, to our congregations.

As part of moving to a regional structure, we do expect to move to a "unified ask". In other words, there will only be one request for funding from the UUA, rather than separate asks from the Association and from the District. There are also plans to explore moving away from a "by member" calculation in congregational contributions to the Annual Program Fund, and to a "percentage of common expenses" calculation. The goal of this would be to maintain the current level of giving to the Annual Program Fund, but no longer base that calculation upon membership numbers.

Is there any expectation that the cluster structure will change in the next 5 to 10 years (i.e. smaller clusters, larger clusters, clusters of small or large churches, clusters of rural or urban churches, etc...)?

While we are sure cluster structures will continue to evolve, we cannot predict what that will necessarily look like. However, we do expect to see two primary ways that congregations find community amongst each other. The first is Geographical Clusters, and the second is Affinity Networks.

A Geographical Cluster are congregations in a geographical proximity to one another, that share general characteristics of their local culture. The goal is to have all congregations in a geographical cluster be within a couple of hours drive from one another at the most, and be from similar communities. In the Joseph Priestley District, it is expected that the current 6 geographical Clusters will remain in place, although the membership in those clusters might shift a little. Those clusters are: the Northern Virginia Cluster, the Capitol Cluster, the Greater Baltimore Cluster, the Delmarva Cluster, the Central Pennsylvania Cluster, and the Greater Philadelphia Cluster. A few of our congregations are finding their natural geographical clusters are with congregations

currently in other Districts, such as the Appalachian Cluster. Some of these clusters have “Cluster Councils” that represent the congregations of the cluster and do planning and coordination with the UUA CER Primary Contact Staff person. All of our Primary Contact assignments are by Geographical Clusters.

We are also beginning to build Affinity Networks between congregations. These are connections between congregations of the Central East Region that share a particular need, concern, or identity. There will be Affinity Networks for Small Congregations, Urban Congregations, Large Congregations, Mid-Size Congregations, and some other longer-term affinities congregations may share. There may also be some shorter-term Affinity Networks, including Congregations in Staff Transition, Congregations in Building Projects, or Congregations in Governance Transition that can be built to help these congregations support one another. Each Affinity Network will have a CER Staff member who supports the network and creates opportunities for congregations to come together and share wisdom and ideas.

Can a short overview set of slides (to be shown to congregations) be created and distributed?

These will be sent out at the same time we send out the answers to these questions

Will the “ASK” for due monies from the UUA and districts be combined at some point?

Yes, a part of the move to regionalization will be moving to a “unified ask”. In other words, congregations will receive only one pledge request each year from the UUA, and the amount will include both the current UUA and JPD contributions.

What will happen to JPD dues?

What is currently the JPD Dues will be combined with the current UUA Dues (Annual Program Fund Contributions) to create one “unified ask” that congregations will receive each year.

Will JPD dues go to the region?

Contributions to the Joseph Priestley District already go to fund Regional Programs, and have done so for over 5 years. Under regionalization, all Annual Program Fund Contributions to the UUA and to the Districts will be combined into one “unified ask” from congregations, and those funds will then fund Regional Staff and Programming at the same levels they are currently being funded. Economies of scale will allow for an increase in both programming and regional staffing for the region.

What are the arguments against regionalization?

There are three common arguments made against moving from a District structure to a Regional structure. The first is the concern that resources from one District will be used in other Districts. The second is that the District Board is necessary for congregations to be represented in UUA Governance. The third is that the District Board provides local control over finances and staffing. The JPD Board believes that the concern about resources is not borne out by our experience over the process of regionalization, and that the District Boars is not necessary for congregations to be represented in UUA Governance. The third concern about local control is a question that the JPD Board of Directors has discussed in some detail, and determined that congregation’s direct connection with the UUA Board of Trustees, as well as the Central East Regional Advisory Council, provided the needed amount of local input into the performance of staff and the use of resources.

What is the financial impact, specifically to congregations, of the proposed district governance change?

We do not expect there to be any direct financial impact upon congregations as a result of this change.

Can a job description template for “cluster representative” be created and disseminated?

An initial description of the role of a Cluster Council Representative has been attached to the email that includes these question responses. We are also attaching to the email that will include the responses to these questions the “Cluster 2.0” document, which will describe the Cluster Council system that three of the six clusters of the JPD are moving toward.

How does reorganization affect the role of “denominational connections” committees?

There is no specific effect. Denominational Connections Committees (sometimes called Denominational Affairs Committees, or several other names) may continue to function in and beyond your church system however you choose. Your congregational Board may select one of the members of these committees to represent the congregation to your cluster council, but you do not have to. The Central East Regional Staff is available to work with and support leaders of your congregation regardless of their role. If anything, we hope that your Denominational Connections Committee or other such structures form a close working relationship with your congregation’s Central East Regional UUA Staff Primary Contact.

Can a copy of the levels of leadership and the people involved be circulated?

This question was a little difficult to interpret. We believe it is asking for an organizational chart of the Central East Region post-regionalization. If that is the case, then yes, we are creating such an organizational chart, and will have current individual leaders named on that chart, both for the Operational and the Governance side of regionalization. It will be attached to the email that includes the answers to these questions.

With volunteer time already restricted by work and family responsibilities, how will clusters be able to reorganize from local to larger governance and regional issues?

Congregational Cluster Councils and other forms of congregational partnerships will indeed be focused on building connection between congregations as their primary work. The governance linkage and communication aspect of their work could be in three areas. First, they can act as a communications linkage between the UUA Board of Trustees and the Congregational Boards. This will mostly be through occasionally informing their congregational leadership of issues happening in the UUA. Second, they can represent the issues and challenges that the congregations of the cluster are experiencing to the UUA CER Staff and to the UUA Board of Trustees. Lastly, if there is a specific issue that the congregations of the cluster feel strongly about putting before the UUA Board of Trustees or the General Assembly, they can build relationships and consensus amongst the congregations to build the coalition of 15 congregations necessary to place an item on the Agenda of the General Assembly.

Can a copy of this presentation be circulated to show congregations?

It will be attached to the email that distributes the answers to these questions.

What recourse exists if the relationship with the UUA is adversely affected?

There are multiple avenues of recourse available to the congregations throughout the process of regionalization, and in the years after successful implementation. This response will name only a few of them. During the implementation of Regionalization, the JPD Board of Directors and the JPD District Executive will remain in place until such time as the implementation is deemed successful, and congregations may contact the Board or DE at any time. Second, UUA Central East Regional Staff will also remain in place, and each congregation can always seek recourse through contact with their UUA CER Primary Contact, or the UUA CER Regional Lead. Congregations can also contact the UUA Director of Congregational Life, the Rev. Scott Taylor, the UUA Chief Operating Officer, Rev. Harlan Limpert, or the UUA President, in order to seek recourse on any issue at any time. As always, your CER Regional Staff would appreciate allowing them to address issues at the lowest level possible, beginning with your CER Primary Contact, but all these levels are available to you. Contact information for all UUA Staff can be found on the UUA.org website.

Within the Central East Region, there is also the Central East Regional Advisory Council, which conducts regular surveys of congregations to determine how well the UUA Central East Regional Staff is supporting congregations, and congregations may contact them during or beyond a survey to seek for issues related to the staff to be addressed.

The Memorandum of Understanding on Regionalization also creates a Financial Advisory Group that will monitor the implementation of the agreement, and if congregational concerns relate to regional financing, recourse could be sought through that group.

And, most importantly, congregations maintain their status in the UUA Governance structure. Congregations can, at any time, contact the UUA Board of Trustees. Any single congregation can do this, and are invited to do so. You can contact Board of Trustees members directly, or through the UUA Moderator. All of their contact information is available on the UUA.org website. Congregations can also send delegates to General Assembly (in person and virtually), and can even seek recourse on the floor of the General Assembly. Fifteen congregations acting together can put a motion on the floor of the General Assembly for full discussion and debate.

How will the JPD ensure that congregations are content with the new relationship?

The JPD Board will remain in place through the process of implementation of the plan for Regionalization, and will only dissolve the district when the board is convinced that the implementation has been successful. Successful implementation included congregations being “content” with the new relationships. The Board will continue its own linkage work with congregations during this time.

After the JPD dissolves, the Central East Regional Advisory Council will conduct an in-depth interview style survey with select congregations each fall, and a survey of all congregations each spring, and how well congregations are living into the new relationships of regionalization will be an ongoing topic of those surveys.

How are “wisdom seekers” selected and organized?

“Wisdom Seekers” as a concept is not either fully developed, nor fully approved. In truth, the question of how they are selected and organized is one of the reasons that the regionalization transition team is exploring the possibility of incorporating a more robust cluster and congregational partnership structure. If “Wisdom Seekers” moves ahead as a concept, its structure and selection process will be developed in communication with congregational leadership.

What evidence exists that a group of 15 congregations will have greater influence than the current 71 members of the district?

The formal governance authority of a District Board in the UUA Governance system is that District Boards can put a motion on the floor of the General Assembly. Under the current structure, District Boards can do that without consulting or even informing congregational Boards that they have done so (although they would often inform). Therefore, the act of a District Board putting a motion on the floor of the General Assembly was not often an issue that congregations had much knowledge of or interest in.

Fifteen congregations (whether they be organized by cluster or not) have the same ability to put a motion on the floor of the General Assembly, but in order to do that the congregational Boards themselves must endorse that action. This means the congregational Boards must be aware of and supportive of the effort to put said motion on the floor of the General Assembly, in a way that they did not when the action was taken by the District Board. Therefore, the action is seen as being taken by the congregations directly, and not by a semi-autonomous elected board.

What happens if other regions and districts do not adopt the same structure?

Different regions are adopting different structures. The UUA Staff and the UUA Governance is adapting to the reality that no two regions will do regional governance in the same way. Even UUA Staffing Structures will have regional differences, depending mostly on the demographics and distances between congregations. The UUA Board and Staff have stated that they will work with whatever structures the Regions choose for themselves.

How does sharing successful programs between districts lead to removing districts rather than encouraging further work between existing districts?

Over 10 years of sharing programming and then sharing staffing between districts, we have discovered that we are better together than we are apart. We have discovered that working as a Unified Staff for the Central East Region gives us the widest range of talent and support for each congregation. We also discovered that many of the programs we share can best be run at the regional level, rather than creating four separate (even if identical) programs. We have also discovered that the fiscal economies of scale by having both a unified staff and programs allows us to put more resources into increased staffing and support for congregations.

In essence, we had achieved all we could while remaining separate districts, and saw that we could achieve so much more together.

What resources are the CERG or UUA providing to help build clusters?

Each congregational cluster has a UUA CER Primary Contact assigned to support that cluster. This support varies depending on the history and the culture of the cluster. The role of the UUA CER Primary Contact in supporting each cluster ranges from administrative and communications support, to providing workshops and trainings, to advising the cluster on events and programming. The CER views Clusters as one of the primary ways that workshops, training, and other programming is made available to the congregations. The CER Staff provides communications, website, and teleconference support to cluster councils on top of the support of the Primary Contact. Cluster Councils can request that the CER Staff run registration for Cluster events, including receiving and distributing fees for cluster programming.

In essence, it is the role of the Central East Regional Staff to help clusters to successfully build relationship between congregations, and all of the resources of the Central East Regional Staff can help make that a reality.

What will happen to JPD programs such as Chalice Lighters?

For the immediate future, the JPD Chalice Lighter Program will continue as it has under the current structure of the JPD Growth Committee, but as a Central East Regional Committee. It will continue to serve the congregations that currently make up the JPD. It will continue to provide grants under the existing policies (as adapted by the Growth Committee). The program will be supported by the UUA CER Program Manager for Chalice Lighters, Andrea Lerner, and by Joan Priest as a CER Adjunct Consultant. Eventually, we do see the Chalice Lighters Programs of all four districts of CERG adapting, but how that adaptation will occur is currently being discussed by those responsible for the Chalice Lighter Programs of all four Districts.

Other JPD programs that have not already become CER Programs will follow a similar pattern. The Chalice Keeper Endowment Committee is currently developing their plan for the program in the event of regionalization, but has already stated that the basic outlines of the program will not change. The JPD Youth Ministry and Young Adult Ministry programs are already integrating with the CER Youth Ministry and Young Adult Ministry programs. The JPD Racial Justice Programs will continue after regionalization, but will include providing programming across the region, and will have a greater involvement of CER Regional Staff.

Is the JPD one the districts that were mentioned as being on the verge of bankruptcy?

No. However, the JPD did experience a major budget contraction over the last two years, and was only able to continue and even increase the level of services and support to congregations by relying more and more heavily on the economies of scale related to Regionalization. The JPD finished the previous fiscal year having expended all of its primary reserves. These reserves are being rebuilt in this fiscal year, and the secondary reserves (of approximately \$77,000) remain untouched. Usually the District seeks to keep 10% of budget in its primary reserves (approximately \$60,000) and finished last year with less than 1%. This was due primarily to increased use of Adjunct Staff Consultants during the transition to a new District Executive, as well as some reductions in Annual Program Fund contributions from congregations, and an unexpected reduction in programming income from event registrations. This year, due to significant budget reductions made possible primarily by Regionalization, the District is in a much more stable financial status.

However, the trend-lines that have affected other Districts across the country are also in evidence within the JPD. As congregations face tighter budget constraints, so to do the JPD. We believe that the best way to continue to provide and increase the services that congregations need is through the economies of scale that come from Regionalization. Our experience of the \$70,000 budgeted income retraction in the 2014-15 Fiscal year compared to this fiscal year show that those economies of scale are real and effective.

Are working districts such as the JPD, which provides many services to congregations, being changed to benefit those that are not working?

In some ways, we disagree with the premise of this question, that some Districts were “working” and some were not. Districts across our association have been serving and meeting the needs of congregations. You could make the argument that some of the Districts that were meeting the needs of congregations without the resources available to the JPD were “working” in a better and more efficient manner. With the exception of two Districts (which each lost half of their membership when the Canadian Unitarian Association split from the UUA), the Districts of the UUA were solvent entities that served their congregations. To add to this, we have discovered that not all of the congregations of the JPD have been at the opinion that the JPD was “working” well, and that there was a great desire for increased connection and services from the District.

While there have been significant shifts in the composition of our Regional staff, and how staff work across District lines, we have not seen any significant overall movement of JPD resources to support programming in other Districts. If anything, during the financial contraction of last fiscal year we have seen an increase of CER Staff from beyond the JPD supporting JPD Congregations and programming, and this has continued into this fiscal year. A rough calculation of the amount of Full Time Equivalency (FTE) spent by the Regional Staff with JPD Congregations shows at least a 1 FTE increase in the amount of staff support to congregations through regionalization than existed under the JPD structure. It is hard to determine exactly, as our staff supports congregations regardless of District lines.

If Chalice Lighters is administrated organizationally at the JPD level but not governance-wise, has the UUA committed to keeping funding at the district level?

No UUA Funding goes into the Chalice Lighter program. The program is entirely self-funded by donations from Chalice Lighters within the JPD. The UUA has committed to continue to provide the necessary staffing support to the program. The funds themselves will be held in a restricted fund either within the UUA Common Endowment, or in separate funds administered by the Growth Committee with the support of the Regional Staff.

There is no plan at this time for Chalice Lighter funding raised from Chalice Lighters who are members of JPD congregations to support Chalice Lighter grants given to non JPD congregations. However, the committees that support Chalice Lighter programs across the region have begun to meet together, to explore what a regional Chalice Lighter program might look like. No decisions have been made, and the JPD Growth Committee (a part of that conversation) is very sensitive to the concern of funding raised to support JPD congregations being used in other parts of the region or the UUA. Any plan to shift to a more Regional Chalice Lighters program will be explored with current Chalice Lighters in all four districts, as well as with congregational leadership.

What is the use case for accessing the services in which the CERG staff specializes?

All services, by CER, the UUA, or even beyond can be accessed with the support of your congregation's UUA CER Primary Contact. They will help you make whatever connections your congregation needs. This will include referrals to the other members of the CER Staff that have specialized skills that can support your congregation in specific issues.

What are the cost and timing aspects from a congregational perspective?

From a congregational perspective, we do not see any particular costs to regionalization. There are minimal costs related to dissolution of the district (primarily legal and filing costs). These are insignificant related to the economies of scale that result from Regionalization, and they are budgeted for as a part of this year's District Budget. Most of the financial cost of Regionalization during the first year of implementation will be offset by a \$44,000 grant from the Ohio Meadville District endowment. If we think of cost beyond monetary, the primary "cost" that congregations may have is that there will not be a District Board they could contact.

Timing, from a congregational perspective, is somewhat dependent on how the process for Regionalization moves forward. What the JPD Board of Directors is asking at the District Assembly is an affirmation of the Board's authority to dissolve the District when they have determined that the regional structures are fulfilling all of their duties. Beyond the vote at DA, the timing will be determined by the JPD Board of Director's assessment of the process.

How can congregations assess the performance of CERG staff?

The UUA Central East Regional Congregational Life Advisory Council is responsible for assessing and advising the UUA Director of Congregational Life and the UUA CER Regional Lead on the performance of the UUA CER Staff. They do this in two primary ways. First, the Advisory Council are all ministers and lay-leaders in congregations of the Central East Region, and so they bring their own experience and wisdom into their discernment. Second, they conduct two surveys of congregations per year. The Fall survey consists of telephone or teleconference conversations with selected Congregational Leaders, Ministers, and Staff from congregations across the Region, selected to give a broad geographical, congregational size, and congregational style sampling. These interviews are often over an hour long, and are in-depth explorations of that congregation's relationship with the CER Staff. They also conduct a Spring survey each year, that is an online electronic survey that contacts every congregation's professional and lay-leadership in the Central East Region. Each Survey results in a report to the UUA Director of Congregational Life and the CER Regional Lead that is a part of staff performance evaluation and staff planning.

We also encourage congregations to have direct relationships with your UUA CER Primary Contact, and to directly engage issues the congregation may have with how well the CER Staff is supporting your congregations. You may also contact the CER Regional Lead, Rev. Joan Van Becelaere, at any time. Contact information is available on the UUA Website, and her email is ivanbecelaere@uua.org.

How are congregations specifically impacted by this reorganization (i.e. possible losses)?

The JPD Board of Directors only sees one possible loss to congregations as a part of Regionalization, and does not believe it is a loss that will have a negative effect. That loss is of a middle-level of governance between the congregation and the Association. This reorganization will mean that congregations will not have a District Board that is "monitoring" issues in the Governance of the Association on their behalf.

This may bring some congregations to feel they need to pay closer attention to the business of the association themselves, something that the JPD Board of Directors feels is a positive outcome of regionalization, rather than a negative one. A recent survey conducted by the JPD Board showed that congregations did not show a significant difference between how connected they felt to the JPD Board or the UUA Board.

We also believe that the increased staffing support, as well as the empowered cluster structures will have significant positive impact upon congregations, just as we hope that congregations will form a closer relationship with the wider association without the intervening middle governance level.

Beyond

How will the Congregational Board be involved with the restructuring of UU Youth Con?

Any congregation has the ability to hold an overnight youth conference (youth con) at your congregation at any time. Your Regional Staff are available to help your congregation do this well, and can provide several different kinds of support. The District / Region also sponsors Youth Cons that are programs of the District / Region in addition to the Youth Cons that congregations choose to hold. The pause in overnight Youth Cons that was announced last Fall only affected the District and Regional Youth Cons within the JPD, not the congregationally sponsored Youth Cons.

Congregational Boards have full authority over the structure of congregationally sponsored Youth Cons, through whatever internal governance process your congregation has. District / Regional sponsored Youth Cons are supervised by the JPD District Executive, the CER Regional Lead, and the JPD District Board. If congregational

Boards have concerns about the functioning of the District / Regional sponsored Youth Cons, they should be in communication with the JPD District Executive or the Regional Lead. If a congregational board has a concern about a Congregationally sponsored Youth Con, they should be in communication with the leadership of the congregation sponsoring that Youth Con.

How will this information be disseminated?

The JPD District Executive has sent updates to the Ministers and Religious Educators of the District related to the progress of re-developing and re-building the District / Regional Youth Con Program, and will continue to do so. An update will be attached to the email to congregational presidents that includes this set of question answers.

How is information about new safety issues relating to UU Youth Con being disseminated to congregations, especially those without DREs?

We envision a two stage process of rolling out the new Central East Regional Youth Con Policies. The first stage is to integrate those policies with the District and Regional Youth Ministry Programs. We are nearing the closing phases of that process now. Once that is accomplished, a version of those policies designed to be implemented by congregations themselves will be developed and shared with congregations by their Central East Regional Primary Contact. The Primary Contacts are responsible to make sure that they reach the right person in each congregational system, knowing that this is different in every congregation. For congregations that do not have a DRE, the UUA CER Primary Contact will likely reach out to the Minister or the Religious Education Committee.

What issue did the JPD recently bring to the floor of the UUA GA?

The JPD Board of Directors recently brought an issue to the UUA Board of Trustees in-lieu of placing a motion on the floor of the UUA General Assembly. The proposal was to modify the role of the UUA President to be more in line with the intentions and practice of Policy Governance. In essence, it would have moved much of the Executive Authority over the association to a non-elected Chief Executive Officer, who could then be held accountable (hired and fired) by the UUA Board of Trustees in a way the UUA President cannot be. If you are interested in seeing the actual proposal, please email dpyle@uua.org and we can send it to you.