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For the greater good: how long-term ministries benefit Unitarian Universalism

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BOSTON UNIVERSITY

SCHOOL OF THEOLOGY

Project Thesis

**FOR THE GREATER GOOD: HOW LONG-TERM MINISTRIES BENEFIT
UNITARIAN UNIVERSALISM**

by

WENDY VON COURTER

B.S., Northeastern University, 1985
M.Div., Boston University, 2005

Submitted in partial fulfillment of the
requirements for the degree of
Doctor of Ministry

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2017

Approved by

Project Advisor

Mary Elizabeth Moore, Ph.D.
Dean of the School of Theology
Professor of Theology and Education

This work is dedicated to the true believers: those who believe in working together for the possibility of a better tomorrow for all Creation's children. To those who fought for religious freedom and those who continue to push Unitarian Universalist congregations toward greater health and strength in achieving that possibility, I dedicate this work.

Acknowledgements

Thank you to family, friends and colleagues who have supported me in this work. Appreciation is most especially due to my wife, Gini von Courter, and to the members of the Unitarian Universalist Church of Marblehead, MA where I have had the privilege of serving for the past eleven years.

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(Order No.)

WENDY VON COURTER

Boston University School of Theology, 2017

Project Advisor: Mary Elizabeth Moore, Ph.D., Dean of the School of Theology,
Professor of Theology and Education

ABSTRACT

Unitarian Universalist congregations suffer from short-term ministries, requiring focus on transition rather than faith development and congregational vision. This thesis suggests that long-term ministries are advantageous, and explores factors contributing to effective long-term ministries. The method was to interview clergy serving eight or more years in congregations and following other long-term ministers. Interviewees were then brought into dialogue with leadership theory, theology, and past studies of the topic. The analysis reveals benefits for Unitarian Universalist long-term ministries, including increased stability, trust, vision, resilience, and spiritual maturity. The thesis concludes with proposals to support long-term ministries more widely in Unitarian Universalism.

Preface

I began this study in my ninth year of ministry with the Unitarian Universalist (UU) Congregation of Marblehead, MA (UUCM) and am completing it in my eleventh. As I began, I felt certain of three things:

- We had reached an important time in our shared ministry that would not have been possible in our early years together. The level of “knowing” each other as congregation and minister, coupled with the clarity that our journey would not end soon, allowed us to participate together in visioning work about our future.
- We were doing a lot things well that contributed to our still being in ministry together.
- We had more to learn.

This is the context in which I set out to interview clergy and laity of congregations where long-term ministries (LTMs) were currently in place and, importantly, were following other LTMs. I believed that there was something in the culture of those congregations that made LTMs more likely than not. I wanted to learn how we in UUCM could solidify our best practices and challenge ourselves to grow into other cultural changes supporting LTMs.

In addition to interviews with ministerial colleagues and others, I considered my own experiences as an LTM minister. While my ministry of over ten

years was not following another LTM in recent years, I felt it held challenges to LTMs that I had overcome in collaboration with my lay leaders as well as important practices that I suspected contributed to successful LTMs. For these reasons I engaged my story through the discipline of autoethnography. Because my ministry is ongoing and I would need to share stories, I focused solely on stories that were essential to this study and I believed would do no harm to those involved. My goal was to present my experience accurately in order to maximize the usefulness of the research toward the end that this thesis would be a positive contribution to UU ministry in congregations. I am appreciative of the leadership and gifts each person who has served the congregation I currently serve as minister and equally appreciative of UUCM's lay leaders, past and present.

As I entered into the interview processes and my own ethnography the voices of Carolyn Ellis, Tony Adams, and Arthur Bochner guided my processing of the interviews and the analysis of my experience. Their perspective on the need to balance the integrity of the research and the relational worlds from which I gleaned the data was formative in this study:

While the essence and meaningfulness of the research story is more important than the precise recounting of detail, autoethnographers must be alert to how these protective devices can influence the integrity of their research, as well as how their work is interpreted and understood. Most of the time, they also have to be able to continue to live in the world of

relationships in which their research is embedded after the research is completed.¹

The cautions offered by these autoethnographers, to take care not to let the need to safeguard identity overpower the integrity of the research, were helpful in the design of the questions, the interview process itself, and the analysis. The questions asked interviewees to reflect upon their experiences from very personal points of view: “At what point did you stop being “the new minister?” (Question #9) and “What indicators let you know?” (Q#10) required the sharing of stories that were specific and detailed interactions with congregants, lay leaders, and, at times, other colleagues. The interview process included assurances that specific identifiers would be masked. This allowed all interviewees to share deeply and offer reflections that some interviewees noted had not been shared aloud in any other setting. The analysis then included multiple readings, each as its own body of data, and later with data grouped across interviews as patterns emerged. I then used those groupings, at that point disconnected from the specificity of minister and congregation, as input into the vignettes I used in Chapter 1: Time Well Spent? Testing an Assumption. I also used data sorted into these groupings for quotes illustrating or illuminating various points within this paper.

1 Carolyn Ellis, Tony E. Adams, and Arthur P. Bochner, “Autoethnography: An Overview,” *Forum: Qualitative Social Research*, Volume 12, No. 1, Art. 10 (January 2011): accessed January 6, 2017, <http://www.qualitative-research.net/index.php/fqs/article/view/1589/3095>.

My hope is that this process honored the depth of trust required for the authentic sharing that each interviewee afforded me during our conversations as well as our shared vision for learning from the collective results. I want to note that, while many people (lay and ordained), may readily identify themselves and think “That’s me” or “That’s our congregation,” the vignettes represent no single ministry and many similarities occurred throughout the interviews.

I remain deeply appreciative of each person who shared that trust, their time, and their wisdom for the benefit of this work.

Table of Contents

Contents

List of Abbreviations	xv
Glossary and Acronyms.....	xvi
Chapter 1:	1
Time Well Spent? Testing an Assumption	1
Methodology.....	3
Listening to Voices of the Church	9
Five vignettes	10
Impossible to Follow	10
Up the Ladder	13
Poached.....	14
Clergy Killers.....	16
Sacred Trust	17
The Problem and the Potential.....	20
Potential from Perspective of LTMs.....	26
What Is Needed?.....	30
Chapter 2:	33
Literature Review – Voices from the Balcony.....	33

Leadership Theory and Conflict Management.....	34
Leadership Theory.....	36
Conflict Management	42
Theology.....	47
Call to Covenant:.....	49
Living Tradition.....	53
The Power of Voluntary Associations	56
Long-term Ministry	59
Chapter 3:	68
Pastoral Pay-Dirt	68
Lessons from the Field	69
Stability	70
Trust	74
Vision.....	76
Resiliency	80
Spiritual Maturity.....	85
Living the Questions: My Ministry	91
Boundary, Boundary, Who Holds the Boundary?	94
Yours, Mine and Ours: The Ongoing Evolution of Shared Social Action.....	96

Claiming Authority	98
Where Are We Going?	101
Conclusions from AutoEthnography	102
Chapter 4:	106
Conclusions: Recommendations and Moving Forward	106
Recommendations	108
Recommendation 1: Hold the health of the congregation central.....	108
Recommendation 2: Be explicit in tying the commitment to congregational health to our theology.	111
Recommendation 3: Maintain boundaries.	113
Recommendation 4: Speak truth and listen well.....	114
Recommendation 5: Stay at the table.	116
Recommendation 6: Learn to be responsive rather than reactive.....	118
Recommendation 7: To ministers in search: get to know the congregation before you go.	119
Recommendation 8: To congregations in search: get to know the minister before you call them.....	121
Recommendation 9: To the interim minister – do no harm.....	122
Recommendation 10: To the out-going minister - let go.....	123

Caution..... 124

Pointing to the Future..... 126

Appendix A: Clergy Interviewees 130

Appendix B: Interview Questions for Parish Ministers 134

Appendix C: Advice from the Parish Minister Interviewees 139

Advice to Ministers and Seminarians Seeking LTMs..... 139

Advice to Congregations Seeking LTMs 143

Bibliography 146

Vita 151

List of Abbreviations

CoM:	Committee on Ministry
GA:	General Assembly
JLA:	James Luther Adams
LTM:	Long-term ministry
MRC:	Ministerial Relations Committee
STM:	Short-term ministry
UU:	Unitarian Universalist
UUA:	Unitarian Universalist Association
UUMA:	Unitarian Universalist Ministers Association

Glossary and Acronyms

Congregation: My references to congregations are Unitarian Universalist (UU) congregations, a group of people freely assembled in a covenanted relationship who have sought and gained membership in the Unitarian Universalist Association (UUA) of congregations. UU congregations are self-funded and managed. They may carry the name church, congregation, society, fellowship, or other name of their choice. They are members of the larger Unitarian Universalist Association (UUA) which exists in a servitude relationship of support. Dues from each congregation, as well as other funding, are paid to the UUA in support of that work but no directives come from the UUA in regard to management, message or minister selection. Congregations have the power to ordain UU ministers, hire them and call them as they wish. It is most common for interim ministers to be hired by the authority of a Board of Trustees or a similarly named group of lay leaders. Called ministers are voted on by the congregational membership. Other than gross misconduct, ministers generally leave a congregation through their own choice, through a settlement negotiated with the leadership, or through a vote of the congregation.

Fellowshipped Ministers: Fellowshipped ministers are UU ministers who have successfully been through a UUA credentialing process that includes the

equivalent of the completion of a Masters of Divinity degree, Clinical Pastoral Education (CPE), an internship, sponsorship by a UU Congregation, a career assessment process that includes a psychological review, and a successful meeting with the credentialing body. After receiving preliminary fellowship, ministers are required to have a senior colleague as a mentor and to meet monthly with that mentor. The preliminary fellowship period lasts between three and nine years, depending on the successful completion of three renewals. In the case of parish ministry, renewals require input from the lay leadership of the congregation, the congregation's Committee on Ministry, and the minister. All of the ministers I interviewed for this study were fellowshipped ministers.

Settled Minister: The minister who has been called by a vote of the congregation to serve the congregation as their minister. The minister may be a sole parish minister, a senior minister in a multi-minister setting, a minister of music, a minister of religious education, a social justice minister, an associate minister, or other specialize minister. Some ministers are hired by the board of a congregation to serve as their leader in some capacity. Some UU congregations are lay-led and do not have a settled or hired minister as their spiritual leader. All of the ministers I interviewed for this study were settled parish ministers, except for those working at the UUA and/or as interim ministers.

Interim Minister: Ministers hired specifically for the time in between settled ministers. This time period is generally one or two years.

Search Process: The process a congregation goes through in order to secure a settled minister. The pathway to a called parish minister position involves an online mutual selection of congregation by minister and minister by congregation. Once that selection has been made, ministers are invited to be interviewed by the congregation's Search Committee (SC). The SC is usually a group elected by the congregation. If the minister and SC decide to proceed, the minister is named as one of their precandidates. It is common for a SC to identify three to five precandidates. Each of these spends a weekend meeting with the SC and leading worship in a neutral pulpit (one other than the SC's congregation). One candidate is then presented to the congregation as the SC's selection. That candidate spends a full week with the congregation. They meet with various committees, groups, and individuals and preach twice. Following the Sunday service at the end of the week, a vote is taken whether or not to call that minister. It is rare that a minister would accept a call where less than 90% of the vote was affirmative. Some ministers state a requirement of over 96% or higher.

Committee on Ministry (CoM): A group of congregational members who meet with the minister monthly to address issues impacting the health of the overall ministry of the congregation. In theory, the Committee on Ministry is a group of lay leaders who have the trust of the minister, the Board of Trustees and the congregation. They operate as the group focused on the overall ministry of the congregation rather than older models that focused solely on the minister. In reality, some CoMs still use a Ministerial Relations Committee model (see next

entry), which often results in the CoM being seen as the Complaint Department. Other CoMs have adopted the more expansive role and may participate in overall assessments of the various ministries of the congregation (lay and ordained), help the congregation deal with disruptive behaviors, work on covenants, and participate in other ways that focus on decreasing congregational dysfunction and increasing congregational health.

Ministerial Relations Committee (MRC): A group of congregational members who meet monthly with the minister to discuss the relationship between the minister and the congregation. Prior to the adoption of Committee on Ministry models, MRCs existed with a primary responsibility of helping to manage the relationship between the minister and congregation. Some congregations still use this model. Historically MRCs have varied in function. Some have operated as a useful place to bounce off ideas, provide historic background on various situations and be supportive of the health of the minister. Some have operated more reactively to criticism of the minister from individual congregants.

Board of Trustees: The group of congregational leaders elected to manage the business of the congregation. This is the lay leadership of a congregation. While some congregations use the term Standing Committee, each congregation is usually governed by a group of elected lay leaders with term limits. The make-up of the board is generally outlined in the congregation's bylaws. They usually use Roberts Rules of Order. Most have officers including President,

Good Offices: A program of the UU Ministers Association (UUMA) and other UU Religious Professionals Groups (i.e. religious educators) that provides colleagues to help colleagues in need of advice, support, counsel, and/or mediation in their relationship with their congregation or other religious professionals. In the context of this study I reference Good Offices for ministers who are in need of counseling, mediation, and/or advocacy.

UUA: The Unitarian Universalist Association of congregations (UUA) is the institution created in support of its member congregations. Its physical location is in Boston, MA. It offers national and regional support to UU congregations throughout the USA. UUA Staff, supplemented by volunteer committees manage the ministerial credentialing program for UU congregations.

UUMA: The Unitarian Universalist Ministers Association is a membership organization that supports UU ministers with mentoring, conflict resolution through its Good Offices program, and ongoing professional development.

Chapter 1:

Time Well Spent? Testing an Assumption

My research begins with a thesis that long-term ministries (LTMs) are beneficial for congregations, ministers and the Unitarian Universalist faith.² Further, some LTMs are difficult to follow and do not necessarily pave the way for a second LTM. Finally, there are things that people can learn in order to maximize the chances ministers can achieve a LTM and help congregations maximize those chances as well.

The study is necessary because Unitarian Universalist (UU) Congregations suffer from frequent turn over in ministerial leadership. The transition process is lay-volunteer intensive, and draws leaders away from other important congregational efforts and their own faith development. As the congregation turns toward transition and the question of future leadership, the community loses opportunities for transformational growth of individuals, leaders and the congregation as a whole. Vibrant plans for the future may be postponed.

Long-term ministries (LTMs), those lasting eight or more years, offer the benefit of minimizing staff transition and enhancing the longevity of relationships and shared ministry. When done well, LTMs allow for deeper growth in the areas of: stability, trust, vision, resiliency, and spiritual maturity.

² Long-term ministries (LTMs) is used interchangeably with 'long-term pastorates.'

Successful LTM benefits are local to the specific congregation and community in which they are located, but they extend to the health of the larger UU faith community as well. Yet, we do not prepare seminarians to lead LTMs, nor do we encourage congregations or settled ministers to seek them, nor do we manage congregational conflict while keeping a successful LTM is a worthy goal.

In a time when UU congregations are experiencing an overall decline in participation, examining a practice that is known to be disruptive in congregational life and faith development should be compelling. Pew Research Center data focusing on Unitarians (and other Liberal Faiths) reflects a decline in the ‘importance of religion in one’s life’ from 31% in 2007 to 25% in 2014. The same report noted an increase of those who seldom or never attend services to 52% over the same time period.³ Our survival requires that we explore systems that increase engagement, and those that detract from engagement and membership. Our theology, rooted in a call to covenantal, justice-seeking community demands we do so. This study does both: makes the case for LTMs; and, creates a resource for ministers and congregations motivated to achieve them.

³ “Religious Landscape Study: Unitarians and Other Liberal Faiths in “Other Faiths” Tradition,” Pew Research Center, accessed 2/13/1016, <http://www.pewforum.org/religious-landscape-study/religious-family/unitarians-and-other-liberal-faiths-in-the-other-faiths-tradition/#beliefs-and-practices>.

Methodology

Setting out to test the thesis that LTMs were beneficial to Unitarian Universalism congregations and the larger faith movement required an interview process that engaged ministers serving in LTMs. The process also needed to acknowledge my own biases. It needed to offer protection for the privacy of the ministers and congregations involved and it needed to allow for the possibility of unexpected outcomes. This following section details more of this process.

While I had hoped to include data regarding settlement lengths, transitions and demographics, that information has not been tracked by the UUA. Regardless of its availability, the intent of this study was to collect and analyze stories from the field. This may lead the UUA to see the value of collecting more complete settlement data in the future.

Any bias I brought to the research was due to my own experience as a LTM pastor who believed the lay leaders and I were doing some good things that contributed to our LTM and also that we were experiencing benefits not available to us earlier in our ministry. Those benefits included a greater clarity of roles and decision making, a much higher level of trust that made room for greater growth in worship and congregational life, and a more authentic conversation space about when we were on and off track.

I consider the participating ministers, the interviewees, as my co-researchers. We enjoyed lengthy conversations with the questions listed in

Appendix B serving as a guiding tool. The questions were intended to capture benefits and challenges the ministers attributed to the longevity of their predecessor and the longevity of their own ministry. The questions ranged from biographical data (e.g. Was this your first settlement?) to reflective (e.g. Are there things you learned after year #5 in your ministry that helped your continued ministry in significant ways?) Some were binary Yes/No (e.g. Have you taken sabbaticals?) and others were open ended (e.g. How do you manage boundaries with your congregants?) Of the forty-three questions, thirty-one were open ended. They included questions about the culture of the congregation, the practices of the minister and the congregation, reflections and conclusions from the minister about positives and negatives associated with LTMs, and recommendations from them to seminarians and ministers considering LTMs and to congregations seeking to attract and nurture LTMs.

The interviewees were selected through consultation with the UUA Department of Ministry, my own knowledge, self-selection through an invitation in the UUMA collegial Facebook group, and, in some cases, referral from within the group of interviewees themselves. The intent was to learn from ministers who were serving in LTMs that followed other LTMs so the interview pool was primarily ministers who were, or had, served in a congregation for eight or more years following another settlement of eight or more years. There are two exceptions in which there was a very brief ministry in between that ended quickly for reasons not believed to be relevant to this study. In these cases, the reasons for the early

departures were personal and/or motivated by influences outside of the congregation. I included these interviews because I was focusing on LTMs that followed LTMs, believing that I could learn about the culture of the congregation in the arc spanning two or more LTMs, and believing, with the current LTM ministers, that these congregations fit the study. The underlying belief was that something(s) existed in the culture of the congregation that attracted and sustained LTMs.

The interviews were done in two rounds. The first were done in the summer of 2015 as part of an independent research project, and the second round was done in the fall of 2016 and early winter of 2017. I invited those in the first round an opportunity to address questions 30-43 via email as those questions were not included in the first round of questions. I had added questions to allow me to capture more reflections about the time period just before and after a ministry became an LTM (e.g. Are there things you learned after year #5 in your ministry that helped your continued ministry in significant ways? What made it easy to stay for this long? What made it difficult?). I also added questions inviting the interviewees to reflect on the positives and negatives of their length of service to themselves and also to the congregations they served. Finally, I added questions in order to capture recommendations for seminarians, ministers, and congregations seeking LTMs.

I originally intended to interview lay leaders as well as the ministers of LTMs, but an early finding in the clergy interviews suggested that the greatest power for

impacting LTMs rested in the leadership of the clergy. This is not to say lay leaders do not play a role. They play an essential role in the length and quality of ministries. Six lay leaders were interviewed in the first round. These six lay leaders were all from a single congregation in which the present minister and previous one were both LTMs. Their answers allowed me to have a closer view into one congregation with long experience with LTMs. The settled minister, who was one of the clergy interviewees, identified the lay leaders. Most had been active as leaders during the current LTM and the previous LTM. Their responses were used in the study but are not presented as representative of all lay leaders of LTMs.

Appendix A details the interview selection process and lists all of the interviewees, their years of ministry with their current congregation, and the years of service of the prior settled minister. I interviewed twenty-one clergy and six lay leaders serving UU congregations in the United States and one UU minister serving in Canada. Two are retired. One is a newer minister following a long-term pastorate. One is new in her position following a long-term pastorate, but has herself served as a long-term minister who followed a long-term pastorate. I also interviewed Rev. Keith Kron, the Director of Ministerial Transitions at the UUA.

The interviews were primarily conducted by Skype, Facetime, or phone but some clarifications, and the additional questions for round one participants were obtained via email. The interviews lasted between 60 and 120 minutes.

All interviewees were asked for their consent. The consent was obtained as part of the invitation to be interviewed, and it included consent to be interviewed and to allow the resulting information to be used in this Doctor of Ministry thesis and in future publications and presentations. Because I had conducted an earlier round of interviews prior to this project, consent was also requested for those interviews to be considered in this body of work and future publications. Any interviewees for which consent was not obtained were removed from the data set entirely and their name does not appear. Interviewees also had the option to decide whether they would allow their name to be used. Because consent for this was not unanimous, this document presents aggregated data; quotes from interviewees without names (e.g., “one interviewee said ...); and specific attribution for a few quotes for which specific permission was sought and received.

During the interview process I took copious notes. The notes were recorded in an empty template for each interviewee. The template included the questions. Comments that went beyond the scope of any specific question were also documented. Following each interview, I reviewed the notes to see if I needed further clarification on any matters. At this point, each of the files retained specific attribution to the interview and the congregation they served.

As I moved forward into active analysis of the data, I reread each of these files in a single setting to determine what themes emerged. Those themes were highlighted within the individual files but also noted in a separate file. That file did

not include attribution. This process was repeated for a total of two post-interview readings. A third pass of each of the individual's files was done in order to create a third set of files that served as a compilation of responses across all interviews. That is, all answers to a single question appeared contiguously in a single file. These also did not carry specific attribution, though I recorded direct quotes from interviewees in these files. The themes that emerged from both processes were then tested in a final read of the individual files. In this final pass, my focus was on finding areas in which these themes emerged in a secondary role. For example, if the major theme of stability emerged primarily in response to the question regarding benefits the minister attributed to their length of service, did it also appear in response to the question about the benefits of the prior ministry, and/or the question about conflict, and/or the question about how the congregation was seen in the community, etc.?

The interviewees were consistent in their affirmation that LTMs offer benefits not available to short-term ministries. Those benefits – stability, trust, vision, resiliency, and spiritual maturity – are discussed in detail in Chapter 3: Pastoral Pay-Dirt. The interviews also revealed factors that contributed to LTMs that may have been present in some LTMs but not all. Just as each minister cannot be all things to all people, all LTM ministries and their ministers bring different strengths and growing edges to the journey. These are detailed in Chapter 4: "Recommendations." Finally, each minister had an opportunity to offer advice to seminarians and ministers considering LTMs and to congregations hoping to have

LTM's. I have included these in Appendix C as they were offered and recorded in the interviews. While many of the recommendations overlap, each of these interviewees expressed such encouragement for others to serve in LTM's that I wanted to be sure to include all of their voices.

Listening to Voices of the Church

When I first heard the call to ministry I sought out two different ministers for whom I had tremendous respect, affection, and admiration. I shared with each of them, separately, how I felt compelled to become a UU minister. Both said "Run! Run far away and fast!" I replied "I can't!" Each replied, "Then it's a real call." Their advice to run was not something I understood then, but I came to appreciate it more as I moved deeper into that call and the lived experience of being a UU parish minister. I have come to appreciate that ministry is rich in gifts but also requires we stretch ourselves throughout our ministries. As each interview in this study revealed from individual ministers and together as a group of ministers, ministry is as full of ache and challenge as it is of awe and transformative love. It tests each minister in ways we cannot imagine while we are in seminary.

If we didn't run away screaming from the first call, then we mustn't run away when the call reminds us why we answered. I invite you, my colleagues, and the courageous lay leaders who respond to the call to leadership in our congregations to listen to the stories from those who have served us so well in long-term ministries and then commit to seeking to follow. I believe it by listening to the wisdom from

these stories, and reminding ourselves of our original call to ministry, we might move forward into a stronger, more relevant future for Unitarian Universalism.

Five vignettes

The following five vignettes are composites in that they do not represent any one specific ministry. The vignettes are based on stories shared from conversations and experiences with colleagues throughout my years in ministry. They reflect short-term ministries (STMs) and the type of LTM most often held up as a reason not to pursue LTMs. The names, church names, and location are all pseudonyms so as to protect the ministers and churches from which these vignettes were formed. Each is a composite of three or more specific stories and even then, details have been masked to further protect identities. These vignettes are intended to accurately represent the different scenarios present in UUism. They were created as composites and draw on decades of stories from the interviewees and other colleagues. While they do not intentionally portray a non-fictional setting it is entirely possible the scenario they describe has or is happening in a UU congregation. If that is the case, it is purely coincidental.

Impossible to Follow

Jenna arrived at the UU Church of Fellsway (UUCF) excited about her ministry. She was a second career minister who had responded to the call to professional ministry after her children were in young adulthood. She was a lifelong UU arriving with a lived experience of congregational life as well as decades of lay

volunteer and leadership experience. Her professional life prior to following the call included business management in the IT field complemented with an MBA. Her spiritual practices were strong. Her personal life was satisfying. When UUCF unanimously voted to call her as its eighth settled minister, she felt for sure she had found a home. Her partner gave notice in a job she had held for 23 years. They and their two dogs picked up their household and moved half-way across the country.

Jenna was aware she was following a ministry of 23 years. She had been told by colleagues and the chairperson of the search committee the former minister, Thom, was much beloved and would be a 'hard act to follow'. One senior colleague had chuckled when she shared her call at a district meeting, saying "Oh, my! I hope you don't plan on being there long!" Another said "As long as you're clear, that will ALWAYS be Thom's church!" A staff member of the national office offered best wishes and the advice "You'd do well to consider this interim ministry."

Jenna listened, but also hoped, surely they were wrong. This was her first settlement but she was not new to congregational systems. Well versed in organizational development and family systems, she believed her assessment of the congregation was accurate and that a healthy ministry awaited.

Before long she discovered the presence of the previous minister was more active than she had anticipated. Not a single Sunday went by without at least one reference to Thom. The references were about how Thom did things or what Thom

liked or allowed or didn't like or didn't allow. A member planning her daughter's wedding said "Of course, you'll understand that we'll want Thom to officiate" and two families planning memorial service voiced the same expectation. While Jenna found appropriate ways to respond to the requests for Thom's participation in these rites of passage, and in fact had Thom's cooperation in this, the identity of UUCF itself seemed inextricably connected to Thom.

Jenna felt Thom's presence in the board room as well and even at committee levels. Decision making wasn't simply flavored by "What would Rev. Thom do?" as part of the conversation. Rather it seemed to Jenna that decision making was stalled lacking Thom's actual presence. Jenna wondered if she were invisible at times. Although she had expected to have to earn the congregation's trust, she had also expected to be afforded an opportunity to do so. After four years she found herself exhausted from trying to achieve what she by then determined impossible. She actively went into search and left at the close of her fifth year. She relocated for the new call. Her partner followed a year later when she had found another job. Their house remained on the market for two years during which time they struggled to pay rent and mortgage.

A schism at UUCF followed. On one side were those who believed Jenna was a good match to help UUCF move forward into its next chapter. On the other were those who believed the search committee had made a mistake in selecting Jenna. UUCF underwent a single year of interim ministry while they underwent

another search process. A new minister was called and left after three years, reporting a similar experience to Jenna's. UUCF entered a third round of the interim and search process. The schism continued. In addition to painful conflict in the congregation, UUCF small group ministries faith development processes were derailed with conversations about the ongoing schism and Sunday worship newcomers encountered a confusing welcome.

Up the Ladder

Alex followed the call to ministry after a decade in social work. He was deeply committed to supporting healthy family systems and felt moved to bring his skills into a parish setting. Alex had been active in UUism on a national level. He had been a leader in the design of a trauma response network and also active in racial justice work. Alex counted upon his mentors some of the top leaders in the association. His internship was with a large, thriving UU congregations, he had been on the national stage at the annual General Assembly and he had chaired two significant national committees.

In collegial circles, Alex was expected to 'do great things.' That view was shared with him by several senior colleagues who consistently equated that message with 'large church' leadership. When called to UU Waveland, a small congregation in Michigan, Alex saw the church as a training ground for those greater things. The congregation had worked hard in their stewardship campaign to be able to increase their salary package. They had also been advised by the

UUA that ministers would be more receptive to congregations paying full 'fair share' to the UUA, so they had stretched to do that as well.

Alex knew that five years was considered a reasonable 'norm' and intended to go into search in year five, hoping to find a larger church as part of his career plan. In year three, however, Alex heard directly from a mentor that a congregation, nearby UU Waveland, would be open the following year. His mentor told him he knew the leaders were interested in him and urged him to submit his name. He did so and was indeed called to that nearby congregation.

Alex began his new ministry in what would have been year four with UUCW. The pattern repeated itself four years later when the same mentor told Alex an associate position was opening the following year in another large church. The mentor noted the senior minister was expected to retire soon so it would provide Alex with an inside edge for the senior position. The second ministry lasted only three years. The senior minister of the larger church did retire shortly after Alex took the call as Associate. However, Alex was not considered for the senior position. He went into search three years later, following a conflict with the newly called senior minister. Now sporting a track-record of short ministries, Alex had a hard time finding a new position.

Poached

Lane is in year six of settled ministry at UU Society of Lake City a 160-member congregation. The congregation is 53 years old and has a history of

keeping ministers for over a decade. This is Lane's first settlement and things have been going well. UUSLC ministry has enjoyed collaborative visioning between lay leaders and the minister. Most recently UUSLC led a process to build interfaith relationships that included Muslim, Jewish and Christian leaders. Lane's leadership as convener of the interfaith council has been instrumental in forwarding the idea of a community-wide conversation space focused on how to build relationships across cultures. Plans for an event are evolving. It is hoped to happen at UUSLC later this congregational year.

UUSLC has maintained its size despite a waning of congregational membership across denominations and has seen a recent surge in young families. In response to the surge, Lane and the Board have been discussing how best to meet the needs of the new families and integrate them into meaningful membership. The conversation morphed into a larger conversation of 'Living Our Faith into the Future' and the possibility of a capital campaign rooted in that future emerged.

Lane received a phone call from the national association (UUA) about an upcoming vacancy. The caller urged Lane to consider the job. The position is indeed a good fit for Lane's skills and comes with the stability of benefits and a more predictable weekly schedule. The position begins in two months. Lane filed the paperwork and alerted UUSLC two weeks later that their ministry together would be ending in six weeks.

Lacking Lane's leadership, the interfaith event did not happen. The RE conversation waned and efforts to move the "Living Our Faith into the Future" were put aside to focus on the sudden departure, the church's late entry into securing an interim minister, the creation of a search committee, and discussions about budgetary concerns associated with paying Lane for an untaken sabbatical.

Clergy Killers

The UU Church of Hardington (UUCH) had a reputation of chewing up ministers and spitting them out. In their eighty-eight year history, their average length of ministry has been 28 months. The congregation is located near a University and a rapidly developing cultural center. Both reflected a demographic favorable to the congregation's potential growth. Despite that increased UU-aligned population, the congregation's membership had consistently dropped over the last twenty years. Rather than newcomers offsetting natural attrition from an aging congregation, seekers were turned off by the sustained level of conflict around ministerial leadership.

At any given moment, a new minister was either on the way in to ministry with UUCH with the question "How many months do we think this one will last?" or on their way out. Lay leadership was on edge almost all the time. Members asked to serve on the volunteer board for a three-year term could reasonably expect a year welcoming a new minister, a year fighting with and about a new minister, and

a year recovering from a negotiated settlement with a minister. Few members wanted to serve leaving seats open for those who seemed to enjoy the conflict.

Although a very small group of people were deemed most at fault for making the minister's life unbearable, the lay leadership was complicit in letting it happen. Misdeeds ranged from calling the minister at all hours to see if they would answer to sabotaging worship by yelling "That's not true!" and walking out during a Sunday sermon. An early clue for each minister was the discovery that three of the core misdeed-doers met in a small group for coffee most Sunday mornings, during the service.

Members and visitors who arrived from settings in which they had meaningful and respectful relationships with their clergy, were frustrated by the constant turnover and not always privy to the details of the conflict. Those for whom UUCH was their sole experience of congregational life either became increasingly anti-clerical or left the church. Because the ministry was not expected to last, an expectation of getting to know the minister as anything more than an expendable commodity was rare and never rewarded.

Sacred Trust

Rayn followed the call to ministry early. The road to ordination included a one year position as a youth advisor and assistant to a Director of Religious Education in a mid-size church. Rayn's internship was in a small church where the minister had been serving for eight years. During the internship, Rayn had a front

row seat to three conflicts within the congregation. The first involved a long-term member's inappropriate behavior with a youth, the second with a disagreement about authority with the minister and a new board member, and the third, involved a staff member who was openly critical of the minister. In each case, the minister included Rayn in the processes needed to navigate the challenges. A phrase that always stuck with Rayn from that period was the motto "Starve dysfunction and feed health."

Rayn's call led to a settlement at UU Delfina. The mid-size congregation was nearing its 100 year anniversary. The previous minister, Alma, had just retired after 18 years of service. The majority of the earlier ministries had been eight or more years. In Rayn's first two years, some comparisons to the former minister were made as well as some requests for Alma to officiate at a wedding or memorial service. In the case of rites of passage, Alma, although she was made Emerita, declined. In the case of comparisons, Rayn openly appreciated the gifts of the former minister and noted excitement about learning how she and the congregation would be learning about each other and sharing each other's gifts in the coming years. The rare comments that began with "You know, I always loved how Alma . . ." or more subtle comments like "Now THAT sermon is what I started coming to UUCD for six years ago" were met with a smile and an invitation to "say more."

Rayn leaned into the experience of the congregation. Rayn understood the call to be to minister to and with the congregation as it had been, as it was becoming and as it would be. To do so effectively would require a 'knowing' one another: congregation and minister. Rayn believed that knowing would necessarily lead to the trust necessary to journey together into a bright and meaningful future. Rayn also believed the call to ministry required holding the health of the congregation higher than the singular wants or feelings of any one person, including any congregant or the minister.

Rayn's ministry was not without conflict or missteps. In year four, Rayn angered a large donor by neglecting to be more public in appreciating their gift. The donor's displeasure culminated in an outburst at UUCD's annual meeting, in which the member called Rayn a poor minister and demanded Rayn's resignation. A year later conflict with a staff member required a termination. Another year a philosophical difference in approach to an alternative worship service led to a boycott by two families. During Rayn's ministry, the congregation also had a conflict about a rental agreement that involved a member; the conflict came to a head and the board wished it had handled it differently. Because of this conflict, the board created a disruptive behavior policy that included detailed steps on what was considered disruptive and how it would be handled. They created it in consultation with an expert from outside the congregation, but also engaged the congregation in a workshop that allowed feedback into the process. The vast majority of the congregation supported the policy and voted it into their bylaws at

their annual meeting. Three months later, the member who had been unhappy about the rental agreement dispute created more conflict by disrupting a Sunday service and a pot-luck dinner. The board, minister, and Committee on Ministry, followed the steps laid out in the new policy. Although they all agreed it was difficult because it resulted in the suspension of the member, they also agreed it was just, and in line with their charge to protect the health of the congregation.

Upon reflection, Rayn and the UUCD board agreed that they didn't simply weather the conflicts or missteps. They didn't see them as things they survived. Rather they saw them as part of a shared journey. And they viewed them as ministry moments they faced together, directly, with mutual respect and a commitment to the health of the congregation they all felt called to serve. Rayn served for 16 years and was followed by another long-term minister. During those years, the congregation has grown in spiritual engagement, justice work and relationships in the larger community.

The Problem and the Potential

I have noted that Universalist (UU) Congregations suffer from frequent turn over as one minister leaves and a search process begins for the next settled minister. The process that takes a congregation from the departure of one minister to the arrival of the next requires many hours of volunteer service. The costs of that volunteer service comes in increased burnout of volunteers but also lost opportunities within the congregation and in the lives of the volunteers.

The transition process in Unitarian Universalism may last from one to three years depending on the amount of notice a departing minister has offered, whether or not the congregation is participating in an interim ministry and, if so, whether that interim period will be one or two years. Some congregations opt for two years, hire an interim for those two years, and begin their search process. If the interim minister is “not a good fit,” which can be code for “their gifts were better used elsewhere” or “this congregation is a clergy killer and I can’t bear staying another year,” the congregation may hire a different interim for that second year. Other congregations believe they will only need a single year. They hire an interim for that year and begin their search process. Some of these congregations decide to extend that single-year to a second year, either with the same interim minister or another. Although it is rarer, some congregations have a three-year interim period, either by design or because the search process did not result in a call accepted by their candidate of choice or by a sufficient vote of the congregation. Regardless, lay volunteers in the form of the Board of Trustees, Finance Committee, Committee on Ministry, Transition Team, and Search Committee may all become involved in varying degrees and in ways that would not be required without the transition.⁴

The Board of Trustees, or subsets of these bodies, may be involved in a negotiated settlement and/or a hiring process for the interim period. A negotiated

⁴ Or the equivalent of the Board as in some UU congregations this primary governing body may be called the Standing Committee or exist with some other name.

settlement occurs when there has been conflict and the minister is leaving prematurely. The minister and board, at times aided by counsel, may have come to an agreement. For example, the board may have come to the conclusion that their minister should leave. They wish her to conclude her ministry in June, just before their summer break.⁵ The minister, however, feels with such a vote of non-confidence, being present to the congregation in worship and congregational life is untenable and/or not in the best interest of the congregation. She wishes to leave at the end of the month. Conversely, a minister might announce a departure that comes as a complete surprise to his congregation. A job opportunity has arisen at the UUA and he wants to leave at the end of the month. The congregation wants more time. In either case, and in others, both parties engage in a process striving to reach a settlement that addresses the needs of the minister and the congregation. Such settlements often include unexpected expenditures in the form of salary, benefits, and pay for unused sabbatical.

Boards may also face the need to raise additional funds because they wish to be competitive in hiring an interim. They may have to pay for pulpit supply until the interim is hired. And, there are costs associated with the search process. The Finance Committee will also be involved as these unexpected expenses impact the congregation's budget. UU congregations are completely self-funded. Some

⁵ Many UU congregations understand their congregational year to run from just after Labor Day (first Monday in September) to the third Sunday in June, after which UUs have their annual General Assembly. While some UU congregations have ordained clergy throughout the year, many have lay leaders over the summer months.

have endowments but nearly all rely upon annual stewardship campaigns. Finance Committees and boards then set the budgets based on the pledges for the coming year. Congregations vote on those budgets and bylaws require expenditures remain within those approved budgets. Ministers leaving, whether planned or unplanned, cost money. Boards and Finance Committees are often left scrambling to address shortfalls, particularly when the transitions are unexpected.

The Committee on Ministry, if one exists, is also likely to be putting in additional hours as they turn their attention to all aspects of the transition. As the group often engaged in keeping relationships healthy within the congregation (e.g., minister and congregants, congregants and leaders, staff and leaders), this committee may play key roles in addressing the grief and/or relief of the departure, the arrival of an interim minister, and the arrival of the new settled minister. This committee may decide to hold special sessions to listen to the concerns of the congregation. They may be called upon to mediate between factions that have formed regarding the departure of the minister. They may be meeting more often with the minister to discuss how best to communicate the departure and help plan for a good parting. While the Finance Committee may be engaged with the numbers aspect of the transition, this group may be unusually busy engaged with the heart aspect of the transition.

Many congregations will also appoint or elect a Transitions Team to help guide and/or support the hiring of an interim minister and support the search

process. This committee may serve in a consulting role to the interim minister, providing the interim with historical information (e.g., some background on the different ministries, structures). They may also be tasked by the interim to conduct polls and interviews of the congregation to help the search process (e.g., theological diversity, demographics). They may also lead the congregation in getting to know who they are as a community of people, as a system, and as a congregation seeking new leadership. An example of a Transition Team activity is holding a workshop that asks congregants these questions “What’s a moment you felt most connected in this congregation?” “How do you think we are known in the community?” “When you picture our congregation in ten years, what do you see?”

Finally, a Search Committee will be elected by the congregation and participate in an intensive process toward the presentation of a candidate to fellow congregants as the next called minister. Search Committees often meet weekly and their schedule intensifies as the search process nears completion. Most search processes are completed in two years. Search Committee members need to maintain the highest level of confidentiality as nobody other than fellow committee members may know the identity of potential candidates until they have reached their decision. They will spend many hours together and away from other parts of congregational life. Yet, ideally the Search Committee is made up of people who are very active in various aspects of congregational life.

In addition to the drain on lay volunteers, staff will experience new stresses.

They may carry the burdens of increased workloads, possible change with new ministerial leadership, and, in some situations, additional and new roles as conflict mediators and pastoral providers. Staff may also be terminated during a ministerial transition. Ministers have left because of conflicts with staff in which boards did not support a termination only to have that staff person terminated weeks after the minister left. Outgoing ministers have also terminated other employees providing the incoming minister with “a clean slate.” And, interim ministers, tasked by boards or motivated by their own observations, have terminated staff in order to save the incoming minister from having to do so. Further, given the wide range of ministerial leadership styles in UUism, some staff may experience increased anxiety about being a good fit with the new ministers (interim and/or settled).

With volunteerism in religious institutions on a decline in recent years, the increase in volunteers needed for a transition is often coupled with a decrease in other efforts.⁶⁷ As volunteers, staff, and financial resources are necessarily applied to the transition process, efforts to begin new initiatives may be put on hold, volunteer needs in existing programs may suffer, and transition volunteers may remove themselves from other programs that feed their souls because they lack

6 “Report Examines the State of Mainline Protestant Churches,” Barna, 2009, accessed December 19, 2016, <https://www.barna.com/research/report-examines-the-state-of-mainline-protestant-churches/#>.

7 “Volunteering in the United States, 2015,” The US Bureau of Labor Statistics, 2016, accessed January 20, 2017, <https://www.bls.gov/news.release/volun.nr0.htm>.

time.

Additional costs of transition may be paid in an absence of some members who are: distressed over the loss of the outgoing minister so they stop attending; upset about the conflict leading to the departure and are upset with other members or the leaders; wish to wait for the new settled minister to see if they like them or not, so they won't attend during the interim time; or, keep attending but will not participate in anything doing with the future (i.e. capital improvements) until they see who the new minister is and whether or not they will like them. Also, new people who are seeking a congregational home and church shopping may pass a congregation in transition by and attend what they perceive to be a more stable congregation.

Potential from Perspective of LTMs

Long-term ministries (LTMs), offer the benefit of minimizing transition and enhancing the longevity of relationships and shared ministry. As revealed in the interviews of this study, and as reflected in some interview excerpts below, LTMs allow for deeper growth in the areas of: stability, trust, vision, resiliency, and, spiritual maturity. In this section, we explore the themes identified by LTMs regarding the benefits of their long-term ministries.

Stability. The first theme is stability. While several ministers noted stability as a plus on a personal level, all interviewees named stability as a clear benefit to congregations with LTMs. One said:

It helped to give them a real sense of confidence and competence in how to be a congregation. They were able to get comfortable with risk taking. To be successful and not successful. They aren't worried that, if they try something that doesn't work out, I'd leave.

Trust. The second consistent theme emerging from the interviews was trust. Trust development was also noted as requiring time. Another LTM explained "They respected the office of the minister, but it was clear that trust was something to be earned." Once gained, trust was noted as significant in contributing to the longevity of LTMs, positively impacting effective conflict resolution, clarity around boundaries and authority, and keeping sabbatical practices.

Vision. Vision also emerged as a near constant theme. LTM congregations almost always enjoyed a vision that was embraced by the congregation and its minister. Some differed in the level of engagement of the minister in setting that vision but most participated in processes that moved them forward toward a greater vision. Several ministers also noted their role as holder of the vision. One said, particularly when all of the current lay leaders are new since the ministry of those ministers began: "You realize that you've survived your transition to a board in which everyone is new [the board members] since your arrival. Now, you are the holder of the story, the vision. And, hopefully, you are handing pieces of it on to them." Beyond being the holder of the current vision, long-term ministers also shared that they became the holder of the many stories behind the vision, including successes and barriers.

Resiliency. Resiliency emerged as a theme for minister and congregation as individual entities and as a team. One LTM described his congregation in this way: “They’ve had the experience of working through challenges and disappointments. They know they are resilient.” Even more evident throughout the interviews was the necessity for the minister to have a strong sense of self-differentiation between the role of minister and the minister’s own personhood. Several noted difficult behaviors ranging from full-on attacks about their integrity to power-struggles over authority. What was similar was their resiliency. One described the effects of weathering conflictual moments: “I think, once they saw I wasn’t going to run away screaming, things changed. It also opened the door for us to develop better systems around conflict.” Resiliency, then, was noted as a requirement of ministers to survive in LTMs and as an outcome for congregations in LTMs.

Spiritual Maturity. Spiritual maturity was a common theme. Many of the LTMs noted the ability to deepen their faith and grow more spiritually with their congregants, their congregation, and themselves. The shared arc of spiritual maturation took place in large and small ways over time. It was noted by several LTMs as a sacred gift. One spoke for many others by describing “this precious, relational gift – to be with families through things, growing together spiritually and developmentally.” Another said, “We’ve been able to grow and deepen. I’ve been able to grow and deepen!” The importance of ministerial growth, in addition to that of their congregation and congregants, was key for many ministers. Many LTMs

articulated it as a 'reinvention' of themselves at different stages of their LTM. In all instances they described these changes in themselves as reinventions enacted in service to the congregation. Several also described the changes as responses to their own boredom or restlessness.

A Good Thing. To a person, the interviewees noted the positive impact of their LTMs as far outweighing any negative impacts. In most cases, they described few negative impacts. When they did name negative impacts, they generally used speculative language, leading with words such as: "Perhaps another minister would have ..."

In addition to the positives of LTMs far outweighing the negatives of LTMs for ministers and congregation, the benefits of successful LTMs extend to the local community of the LTM and to the larger UUA. Most interviewees reported their congregation and themselves "being known" in the community because of service work, justice work, and/or other activism.

Most reported involvement, and often leadership, in the interfaith community. While the involvement in each of these was not always attributed to LTMs, the ability to cultivate and deepen relationships with community leaders and partners was linked to LTMs. In such contexts, the congregation and community were able to join in projects requiring longer-term planning occurred. Also, longevity made it easier to be responsive to instances requiring immediate responses, especially to social justice issues such as Black Lives Matter and

marriage equality.

On the national stage, many of the ministers reported that the congregations they served had a strong commitment to the UUAs Annual Program Fund stewardship program.⁸ These LTMs also reported their congregation's involvement on the regional and national level: attending workshops together; lay leaders filling regional and national leadership roles; and/or high participation of their members in General Assembly.

What Is Needed?

So, why aren't successful LTMs lauded and held up as a worthy and aspirational goal? UU seminaries do not teach seminarians to lead LTMs. The UU credentialing and settlement systems do not encourage congregations or settled ministers to seek them. Existing UU conflict management support systems do not consistently hold LTMs as a goal in the midst of conflict. The UUA does not maintain or publish any data about LTMs. Rather, institutionally, our work is often in direct opposition to their existence. That opposition is often a passive lack of advocacy for LTMs or an active sharing of an anecdotal-based narrative that LTMs are not good for congregations or ministers.

A common thread in ministerial conversation, affirmed in these interviews, and my own experience, is that of equating career building with moving on to larger parishes. "Why don't you want a larger church? Aren't you ambitious? Why

⁸ UUA Annual Program Fund giving supports the programs and staff of the UUA.

are you wasting your gifts in that small church? Don't you know that staying too long is bad for congregations? Aren't you ready to leave?" These are just some of the comments UU ministers have experienced from senior colleagues and UUA Staff. Further, a common denominational practice is to offer UUA staff positions to ministers in currently settled positions.

Each of the vignettes mentioned earlier, "Impossible to Follow," "Up the Ladder," "Poached," "Clergy Killers," and "Sacred Trust" are composites of different congregations and ministers, and they are an accurate reflection of many UU ministry experiences for clergy and laity. The prices paid for the disruption of ministries and dysfunction within ministries are real. Congregations who are deemed "clergy killers" may carry that reputation for decades and, because of that reputation, be limited to hiring ministers who are inexperienced or have already-troubled histories. These common dynamics add to congregations' challenges rather than helping them grow into healthier patterns. And those congregations who suffer from ministers who use them as career-builders will incur greater financial costs because of repeat searches, while also paying the price of lost opportunities to grow in stability, trust, vision, resilience, and spiritual maturity.

Just as the prices for repeated transitions are real, so too are the benefits for longevity and health. The ministers of the LTMs interviewed for this research shared stories that consistently reveal substantial benefits. Their stories reflect how longevity has brought these benefits into their ministries. They also invite us

into further analysis of whether or not effective LTMs are an important means to move UUism forward into greater congregational health, vibrancy, and relevancy.

As I noted earlier, participation in UU congregations is waning and we are called to pay attention. The survival of UUism requires that we explore systems that increase engagement, and those that detract from engagement and membership. Our theology, rooted in a call to covenantal, justice-seeking community, demands that we do so. This study does both: makes the case for LTMs and creates a resource for ministers and congregations called to achieve them.

Chapter 2:

Literature Review – Voices from the Balcony

I remember when I first entered ministry in 2005 that one of the most daunting, and exciting things, was being told “You have to find a mentor.” It was daunting because how do you know what you need before you need it? There were so many wonderful ministers to choose from, assuming the one I chose would agree. But should I chose someone who I believed was like me or unlike me? Should it be someone who does a lot of social activism work, like me, or someone who has a different focus? I didn’t have a clue. But choose I did and it made all the difference. My mentor, was a woman who knew how to view things from the balcony. She carried with her the wisdom of decades of parish ministry, was also a gifted minister, but could take any question I had and invite me up to the balcony to take a look at what was going on in the whole system. Here in this vocation in which it is so very easy to get stuck in the specificity of ‘our’ ministry, and ‘our’ people, and ‘our’ problems, I think it is particularly important to take the time to move up onto the balcony where other voices have gathered and offer wisdom.

This study is, therefore, strongly informed by existing literature in the areas of leadership, change theory, conflict management, theology, and, long-term ministry. While preaching, teaching, and pastoring in a congregation may be the more traditional job description, effective ministers are called to lead. Leadership, change theory, and conflict management are critical elements of ministry. In the

congregational setting, such leadership will require pastors to navigate ongoing change, conflict and other aspects of organizational leadership, depending upon the governance model, size and staff structure of their congregation. Regardless of those elements, each UU minister is presumably responding to a call of faith. That call may be informed, and/or directed by theism, humanism, and/or other theological stances. Their fulfillment of that call through service in the parish should be accountable to Unitarian Universalism itself. Each parish minister, though in service to a specific congregation, should be fulfilling that service in covenantal relationship to the larger faith tradition. Each congregation, served by that parish minister should be able to grow in its own faith development. And each minister and congregation should remain committed to the ideals of UUism as they join together to make the Unitarian Universalist faith alive in the world.

Leadership Theory and Conflict Management

Wherever and whenever people gather together as a formal group, there will be conflict, a need for governance, differing visions for the future, and plenty of change! A moment I will hold dear for all time was an instance when I realized that congregational life was not so different than any of the other realms in which I had operated. Church life and leadership just wasn't all that different from my life in corporate America. I still recall the great sigh of relief I experienced in that moment of recognition. The lesson came when I first began my pathway to ministry as a Director of Religious Education. I arrived with the mistaken belief that people

who were members of churches would always behave civilly toward one another. It didn't take long to learn that was incorrect. I don't recall the details of the conflict but I imagine it was over something like whether or not the children should have snacks at social hour at the same table as the adults or perhaps it was about how the ages were divided between classes. Regardless of the topic, my moment of great epiphany was when I realized that the dynamics in play, triangulation, political power plays, and strategic lobbying, were all very familiar to me. I just hadn't expected them in church. Once realized, the substantial body of work I had benefited from in my earlier work life, particularly lessons from management guru Peter Drucker, proved to be helpful assists. From that point on, my journey was best informed by voices from congregational life, like Edwin Friedman in *Generation to Generation: Family Process in Church and Synagogue*, Thomas Bandy in *Kicking Habits: Welcome Relief for Addicted Churches*, and all-things Alban Institute, but as equal conversation partners with Peter Senge, *The Fifth Discipline: The Art & Practice of the Learning Organization*, Robert Terry, *Authentic Leadership: Courage in Action*, and all-things Ronald Heifetz, including *Leadership Without Easy Answers*. This blend of approaches to congregational life and leadership, coupled with organizational development and authentic leadership, inform my analysis of LTMs.

UU congregations are self-governed with elected volunteer boards entrusted with the overall management of church business. Though some congregations employ a model of Policy Governance with the minister as CEO,

most UU ministers are found somewhere on a spectrum between managing all day-to-day operations to focusing largely on vision and policy. The majority have settled parish ministers as the spiritual leader of the congregation and as an ex-officio member of the board. The level of engagement and power the minister is afforded, and assumes, ranges from very low to very high. Regardless of the level of engagement, a common and consistent perspective is that minister and board share leadership of and leadership for the congregation.

Leadership Theory

In the context of this study of LTMs, three voices of leadership theory are particularly useful: Peter Senge, Robert Terry, and Ronald Heifetz. Senge places leadership in a context of constantly changing culture. Terry roots that leadership in a call for authenticity, spirituality and accountability. And, Heifetz offers tools on the journey.

Peter Senge writes that leadership is “the capacity of a human community to shape its future, and specifically to sustain the significant processes of change required to do so.”⁹ The work of changing a congregational culture, particularly as it pertains to leadership and authority is no small task. Some ministers will think this is beyond the scope of their ministry. In a tradition where self-determination and independence from higher authorities are held dear, change that seems to

⁹ Peter M. Senge and George Roth, *A Fifth Discipline Resource: The Dance of Change - The Challenges to Sustaining Momentum in Learning Organizations* (New York: Doubleday, 1999), 16.

arise from leaders is often met with great resistance. It is understandable that some clergy enter into a search for a different congregation or other position when conflict arises in their current settlement.

Senge's perspective on how power operates in organizations is useful for analyzing LTM effectiveness, particularly in the UU setting. In challenging long-held views that transformation comes from the top down, he writes, "Isn't it odd that we should seek to bring about less authoritarian cultures by resorting to hierarchical authority."¹⁰ Add to this, Senge observation that CEOs promoting a transformation in an organization's culture are often met with cynicism by workers: "Here we go again. I wonder what seminar he went to last weekend."¹¹ Rather than motivate engagement and commitment to transformation, this top-down approach reinforces a culture in which Senge suggests compliance rather than commitment is the best possible outcome. In a compliance model, people (in a church setting, congregants) tell leaders what is wrong and expect change. In a commitment model, people work together with leaders to explore how to best benefit the entire system. They (the people) participate in change as committed partners rather than wait for change to occur and hope that it will address their needs. In the compliance model, because participation is not required,

¹⁰ Peter M. Senge, "Rethinking Leadership in the Learning Organization," *The Systems Thinker* 7, no. 1 (February 1996): 1, accessed January 18, 2017, <https://thesystemsthinker.com/wp-content/uploads/pdfs/070101pk.pdf>.

¹¹ Senge and Roth, *A Fifth Discipline Resource*, 16.

encouraged, or nurtured, learning does not take place and personal accountability rests solely with the leader. In UU congregations, where leadership is shared by minister and board, but may look different from congregation to congregation, and the people are congregants rather than employees, the task of working for commitment rather than compliance from the congregation offers some complexity. As opposed to an organization in which most, if not all, participants are employees, congregations at times have one full-time staff person in the minister, a small number of part-time staff people (e.g. religious educator, administrator, music director), and, between seventy and seven-hundred volunteers. The idea that leadership is shared, regardless of how accurate and compelling it may be, is flavored and complicated by this dynamic in congregational systems. Congregants may reject accountability with no consequence. Ministers may misuse the power of their role to insist upon compliance. Collaborations that are working well with one group of lay-leaders may suddenly change as those leaders complete their service or leave for other reasons.

Robert Terry, addresses the reality of fear in leadership and does so in the context of the underlying call to authenticity for every leader. His leadership theory is not simply informed by spirituality and social justice issues, rather it is birthed in them. To lead is to be in right relationship with the lived reality of your community

and world. “¹² To be out of synch with either requires course correction and that course correction appropriately engages others in the system because authentic leadership does not happen in a vacuum.

Terry’s articulation of spiritual authority is useful in the context of LTMs where a deeper knowing unfolds. The LTM ministers who were interviewed tied access to those deeper levels of knowing to the mutual trust developed over the years of an LTM. Unlike leaders with what Terry calls counterfeit spiritual authority, who use their power to keep followers in line by “manipulating emotions of hope and fear,” LTM ministers do not seek to keep anyone in line.¹³ Their spiritual authority is based on who they are as spiritual beings and how they lead from that place of authenticity. Terry says true spiritual leadership is about being rather than appearing, concerned with the outward impact of their teachings rather than themselves. He explains, “The call to authenticity is not a call to perfection; it is a call to recognize and address our counterfeit selves.”¹⁴ The call to a perfectly imperfect self is necessary in LTMs because failure is not only an option; Terry names failure as a necessity for authentic leadership. Terry’s perspective is echoed by many interviewees in this study. One said, “We learned to succeed and

¹² Robert W. Terry, *Authentic Leadership: Courage in Action* (New York: Jossey-Bass, 1993), 111-112.

¹³ Terry, *Authentic Leadership*, 267.

¹⁴ *Ibid.*, 268.

fail together. The process was often more important than the result.”

Ronald Heifetz, along with co-authors Marty Linsky and Alexander Grashow, offers tools for best practices and course correction for an organization. These authors name the challenge of all people, all countries, and all organizations to respond to the challenge to:

sift through the wisdom and know-how of their heritage, to take the best from their histories, leave behind lessons that no longer serve them, and innovate, not for change’s sake, but for the sake of conserving and preserving the values and competence they find most essential and precious.¹⁵

Heifetz, Linsky, and Grashow stress the need for leadership to be agile, self-reflective and adaptive. The authors promote the practice of “getting on the balcony” to gain a perspective with some distance from “the dance floor”; yet they also recognize the necessity for leaders to move back to the dance floor if they are to lead well.¹⁶ The authors describe the act of diagnosing as the key to adaptive leadership, and adaptive leadership as the key to success. Their model asks leaders to resist the urge to act, instead taking the time to assess from the balcony and to make more informed decisions. In line with Peter Drucker’s efficient vs. effective comparison, this time-intensive approach bears fruit as leaders ultimately

¹⁵ Ronald Heifetz, Marty Linsky, and Alexander Grashow, *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World* (Boston: Harvard Business School Publishing, 2009), location 236, Kindle.

¹⁶ Ibid., location 315, Kindle.

engage in the more important work of the organization.

Given vast differences in seminary training and intern experiences, UU ministers lack consistent approaches to leadership. This fact, coupled with elected boards with a wide range of skill sets and experiences – often comprised of retirees, entrepreneurs, health professionals, unemployed people, seasoned corporate executives, results in continually contested and often conflicted best practices unless a culture of congregational leadership exists. Ministers are best equipped to meet these boards if they arrive in their congregations schooled in leadership theory, and able to converse, navigate, and lead regardless of what governance model is in place and what theories may arrive at the board table.

Heifetz’s approach to ‘distributed leadership’ provides a useful way for ministers, and the lay leaders with whom they share leadership, to understand their collaborative roles in a governance structure. His belief that successful adaptive leadership should “build on the past rather than jettison it.” Such an idea plays well in LTMs, where the past is known both by the pastor and by the congregation in the present.¹⁷

An important factor leading to success in LTMs is the ability to differentiate between self and system. Few ministers are immune to the negative feedback received immediately after the sermon they thought superb, yet the ability to create

¹⁷ Heifetz, Linsky, and Grashow, *The Practice of Adaptive Leadership*, location 428, Kindle.

space for authentic and difficult feedback is essential. Heifetz offers a useful model in his “two-by-two diagnosis matrix” in which diagnosis is actively conducted both of the system and of the self and actions focus on both as well.¹⁸ UU ministers make decisions that are judged to be under their purview by some congregants and not under their purview by others. They may receive commentary on everything from clothing choices to levels of involvement in stewardship campaigns, public acts of civil disobedience, and participation in the community. The need to self-differentiate extends well beyond the Sunday service and no minister I know has not benefited from a reminder to self-differentiate when they were experiencing conflict within their ministry. Heifetz’s call to the balcony and the diagnosis matrix are each helpful tools to assist the minister in those times of need and they are important shared practices between boards and ministers as well.

Conflict Management

While the ability to self-differentiate and to diagnose conflict clinically is important, recognizing the humanity within conflict is also essential for LTMs. It is arguably even more important in religious settings where covenant is key. Thus we turn to conflict management as an important practice of ministry. Parish ministry is difficult work and, because it is relational, conflict often emerges as displeasure directed at the minister. As difficult as a conflict may be, the approach that ministers and congregations take toward the conflict reveals the current health and strength

¹⁸ Ibid., location 299, Kindle.

of their ministry. In a healthy ministry, this is the moment in which ministers and congregations may reap the largest rewards. Those rewards come in increased confidence of the lay leaders and minister in their capacity to move through hard decisions together. The rewards may also include the spiritual maturation of those leaders as they are called to be authentic even in disagreement, and the hope of a better future that is fueled as they emerge together as an intact team. Robert Terry describes this well: “Leadership, in the spiritual view, does not expect roses; it lives with thorns. Yet it is hope filled.”¹⁹ In an unhealthy congregational system, without skilled leadership, conflict will often result in a premature end to a ministry. Either the minister will be the target of the conflict and be pushed out or the minister will feel inadequate to the task of leading through conflict and will seek a different parish settlement.

Having accepted the fact that conflict will occur within congregational systems as it does in other organizations, I wanted to see what Unitarian Universalism itself had to offer in terms of tools. I looked at three bodies of work relevant to conflict management in the Unitarian Universalism Association in this context. The bodies of work are: the Right Relationship Team approach to addressing oppression, the Committee on Ministry model of engaging minister and congregation in the health of the ministry, and the Good Offices program of the UU

¹⁹ Terry, *Authentic Leadership*, 272.

Ministers Association.

As a founding member of the UUA Right Relationship Team (RRT), I speak from direct experience. The team was created in 2007 in response to issues of systemic oppression at our annual General Assemblies (GAs). GAs draw 4,000 or more UUs from all over the country each year. Delegates engage in a business meeting and attend workshops over a period of four days. The RRT was created specifically to address issues of systemic oppression as opposed to offering chaplain services. The model was a dramatic switch to complete transparency as the team leader addressed the entire body each day and held up specific instances from which we were all called to learn and to transform. What was remarkable and effective about the approach was its immediacy, specificity, and accountability. Instances of oppression were reported to team members at times while they were occurring. Direct conversations were facilitated that engaged all parties. Follow-through occurred publicly, allowing the entire body to participate in the lessons and healing. The model was not without resistance, but it continues years later and has been brought into many congregations and other national events such as the UU International Women's Convocation and UU Ministers Association Convocation with equal success.

The second model from UUism that contributes to conflict management is the use of the Committee on Ministry (CoM) model. Roy Oswald writes about a "personal congregational support group" with which a minister can share joys and

difficulties, receive honest feedback about one's ministry, and discuss the impact of ministry on one's life.²⁰ Glen Ludwig calls a similar group a Pastor-Parish Relations Committee and notes that it is called a Mutual Ministry Committee in some congregations.²¹ In these models he reports that the role is to monitor the quality of the relationship between the pastor and the congregation.

While both of these models are useful, the Committee on Ministry model, enacted as designed, expands the focus from sole attention to the ministry of the pastor to a focus on the ministry of the congregation. In a UU context which relies heavily on lay leadership and lay involvement, this approach more accurately reflects the accountability of the mutual leadership of a congregation (lay and ordained), to overall mission and vision. The CoM model asks "how is the health of the congregation" rather than "how do we like the minister." It asks "how might we all work toward increasing the health of the congregation" rather than "what does the minister need to do to make people happy." By placing the focus on the larger ministry as a shared endeavor, the CoM model helps congregations move away from the former models of Ministerial Relations Committees as complaint departments. In so doing, it offers a Heifetz approach to giving and receiving feedback about leadership and about the system; thus, it maximizes the possibility

²⁰ Roy M. Oswald, *New Beginnings: A Pastorate Start Up Workbook* (Rowman & Littlefield Publishers, 1989), location 967, Kindle.

²¹ Glenn E. Ludwig, *In It For The Long Haul: Building Effective Long-Term Pastorates* (Bethesda, MD: The Alban Institute, 2002), 84.

of adaptive responses. Ministers in effective LTMs who used CoM models in this manner credited them as playing an important role in the longevity of the LTM.

Glen Ludwig also writes of the importance of clergy support groups and the judicatory. He explains, “It seems to me that our judicatories are becoming more proactive in regard to support of their pastors.”²² The challenge in UUism is two-fold. First, while a support system in the form of our UU Ministers Association’s Good Offices program exists, it is reported that too often ministers reach out for services too late. Secondly, in conversations with Good Offices colleagues and others, we discover that all parties – ministers, congregations, some Good Offices colleagues, and some regional staff – see departures as a solution rather than seeking resolution toward continued ministries. While I believe there are congregations that are best served by the departure of a minister, the literature in leadership and conflict management suggests that, in most cases, congregations are best served by resolving conflicts with continued ministry with the current minister as a stated goal. Further, I believe ministers best fulfill their calls by resolving conflicts with continued ministry as a stated goal. From this vantage point, I offer the question “How then must this system change in order to support that as an institutional goal?”

In summary, the wisdom drawn from leadership theory includes an

²² Ludwig, *In It For The Long Haul*, 69.

understanding that entities engaged with change benefit most from leadership that engenders commitment rather than compliance. Further, authentic leadership results in a focus on process rather than specific achievements, being rather than appearing, and, effectiveness over efficiency. Models of conflict management that include shared accountability and a valuing of humanity are important. Finally, time is a valuable asset in leadership approaches that call for time on the balcony to best assess movement forward.

Theology

The call for effective LTMs is grounded in three theological threads that are foundational to UUism itself: the call to covenant; the commitment to being a living tradition; and the belief that, through the power of voluntary associations, we are able to change our world. In a faith tradition in which ‘calling’ is not always connected to the voice of God, or even to the existence of God, any theological grounding must be sought within the faith tradition itself. One of UUism’s leading voices for seven decades was that of The Reverend Jack Mendelsohn. In an essay in 1944, written while Mendelsohn was at Harvard Divinity School, he detailed what he called “irresistible beckonings.” He identified each beckoning as a necessary compulsion for those choosing to follow a call to Unitarian ministry.

The beckonings included a way to offer his own contribution to the challenges burdening him and all other souls; the furthering of religious pioneering he equated with the Unitarian tradition; a deepening of his own faith through a

close relationship with others as fellow travelers on a road toward spiritual deepening; an opportunity to use the power of his position to 'strike radically' at the roots of racial prejudice and other systemic social ills; and, an opportunity to impact the moral life and ethical leadership of his community.²³ Mendelsohn was ordained a year later and went on to serve UUism with distinction. Four of his five settled ministries were LTMs with the fifth a five-year ministry.²⁴

UU Historian Susan Ritchie, a teacher of UU History and UU Polity, urges her students and others to locate their call within the tradition as well as within themselves. She, herself a minister in an LTM, and a firm believer in their positive value in our denomination, points to the importance of seeing LTMs in the arc of our history as an affirmation of the call to LTMs. She said:

Don't listen to the voices against it. We're in a transient and historic moment with a bias against long-term ministries and there will be other attitudes. The ministry you claim is one available in our association. People who feel they have to leave or want to leave are claiming a kind of ministry that doesn't have DNA in our movement so there's an abrasion from the start. People should claim it in UUism – not just in themselves.

Both of these voices, Mendelsohn's and Ritchie's provide an historic and current call reasonably connecting LTMs with the fulfillment of the call to UU ministry. Like Mendelsohn and Ritchie, many UU ministers serve their parishes

23 Jack Mendelsohn, "The Unitarian Ministry," *The Christian Register*, July, 1944.

24 First Parish, Bedford, MA (1979-1988), First Unitarian Church of Chicago (1969-1978), Arlington Street Church, Boston (1959-1969), All Souls Unitarian Church, Indianapolis (1954-1959), The UU Church, Rockford, IL (1945-1954). Jack then served three interim ministries and was then named Minister Emeritus of First Parish, Bedford.

well and also serve the larger UU faith outside of their parishes. But what I hear in Mendelsohn's and Ritchie's words is a call to recognize serving our congregations well, as the most faithful fulfillment of our call. And I now understand that service to be best when committed to LTMs. Having myself arrived to parish ministry with a strong social justice portfolio, I can see how when I began in parish ministry I saw my service to my parish as very important but my service in social justice work beyond the parish to be more faithful to my call. It is voices like Mendelsohn's and Ritchie's, coupled with Senge's call to the balcony perspective, that have invited and compelled me to a different and (in my view) better understanding. That better understanding recognizes UU congregations as holding the greatest potential power in fulfillment of the values of Unitarian Universalism.

Call to Covenant:

As a third- and fifth-generation UU, I was birthed into a congregation so membership was a given for most of my life. As I moved into adulthood, however, I came to understand membership as a specific choice that I was making, first for myself and then for my children. I understood that, while most congregations may list the standard three requirements (sign the membership book, make an annual financial pledge, and participate in the life of the congregation), the act of membership was an act of faith itself. As I signed the book I felt reconnected to all the years of living as a UU, all that it had meant to me, and all I hoped it would mean to my children. That act of faith signaled a move from being a participant in

Sunday morning services to belonging to something larger than myself and also larger than that single congregation. My act of becoming a member was an act of declaring myself as accountable to the specific congregation, and through that, accountable to the entire tradition and the promises it holds for a better tomorrow.

To belong to a UU congregation is to respond to a call to make promises to one another for a purpose. The Rev. George K. Beach wrote, “People do not ‘join’ a covenanted community; rather they constitute it; there is no ‘it’ without them and each time new folks join, the whole is literally reconstituted.”²⁵ The basis for our covenantal faith dates back to the Puritans. In his book, *The American Creed*, UU theologian Rev. Forrest Church traces that covenantal journey back to the Mayflower Compact, offering this translation:

“We pledge to walk together
In the ways of truth and affection
As best we know them now
Or may learn them in the days to come,
That we and our children may be fulfilled
And that we may speak to the world
In words and actions
Of peace and goodwill.”²⁶

While UUism is not creedal and congregations do not normally require people to sign a covenant as entry into membership, it is common for UUs to speak

²⁵ George Kimmich Beach, *The Minns Lectures - Renewing Faith: The Parables of James Luther Adams*, (lecture, Minns Lectures, Boston, MA, 1999.)

²⁶ Forrest Church, *The American Creed: A Spiritual and Patriotic Primer* (New York: St.Martin's Press, 2002), location 257, Kindle.

about covenant and how they come together to be with like-minded people with shared values. Rather than the oft-stated “UUs can believe anything they want,” the more common language used by UU leaders is to assert the importance of being called to be together to work for our common values.

Belonging means literally to join into the following statement:

We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote:

- The inherent worth and dignity of every person;
- Justice, equity and compassion in human relations;
- Acceptance of one another and encouragement to spiritual growth in our congregations;
- A free and responsible search for truth and meaning;
- The right of conscience and the use of the democratic process within our congregations and in society at large;
- The goal of world community with peace, liberty, and justice for all;
- Respect for the interdependent web of all existence of which we are a part.²⁷

In addition to the centrality of covenant in UU membership, the Church focuses on the transformative power of choosing to make that covenant real. Many UU congregations have ritualized the use of this covenant written by Rev. James Vila Blake in 1984:

Love is the spirit of this church,
and service is its law;
this is our great covenant:
to dwell together in peace,
to seek the truth in love,

²⁷ Unitarian Universalist Association, UUA Purposes and Principles as stated in the UUA Bylaws: accessed November 11, 2016, 7, http://www.uua.org/sites/live-new.uua.org/files/uua_bylaws_2015.pdf.

and to help one another.²⁸

Covenantal language is about belonging. In 2001, The UU Commission on Appraisal focused its study on “Belonging: The Meaning of Membership.”²⁹ The Commission’s resulting analysis engaged relational perspectives of feminist theologian Mary Hunt and Unitarian Henry Nelson Wieman. Both perspectives informed the Commission’s position that congregational membership is a matter of “ultimate concern and commitment,” adding a stress on:

loyalties, commitments, covenants, the promises we make to one another: These are the things that relate to the deepest meanings of membership. They tell us what we belong to. And by doing that they tell us who we are.³⁰

I believe the Commission’s understanding of belonging serves as a compelling foundation for why ministers and our institutions should place the health of UU congregations as the highest priority in the fulfillment of the call to leadership and effective LTMs as a measure of our success.

The perspective of liberation theology has expanded the import of membership beyond the specific location of the congregation to the larger impact in the world. Informed by Paulo Freire, the Commission has connected UU membership to the necessity of being rooted in experience, engaged, self-

28 James Vila Blake, “Covenant,” in *Singing the Living Tradition* (Boston: Unitarian Universalist Association, 1993), 473.

29 UUA Commission on Appraisal, *Belonging: The Meaning of Membership* (Boston: Unitarian Universalist Association, 2001).

30 UUA Commission on Appraisal, *Belonging*, 12.

reflective and hopeful. If ministry is truly a shared endeavor of the ordained and the laity, the matter of ultimate concern and commitment must be shared as well. The call of the minister must be to the covenant in the specific location as well as belonging in the larger sense to the faith and to the world. This covenantal understanding is in service of maximizing the potential of all members and the congregation in fulfilling the covenant. The liberation perspective noted in the Commission's work serves as a reminder of the high stakes of maximizing our power to impact the arc of the moral universe.³¹ The importance of relationality in tending this goal of maximizing the potentiality of the individual was evidenced throughout the interviews and noted as benefiting from length of service. LTMs that had developed relationships in the interfaith community and larger local communities had done so over many years. Several of the interviewees noted with appreciation how they were able to count on relationships with other clergy and other community leaders to collaborate in larger projects and also when events arose rapidly in response to specific instances of injustice.

Living Tradition

Unitarian Universalism self-describes as a 'Living Tradition.' The idea and practice of being a living a tradition is not unique to organized religion as so many religions rely upon reinterpretation, contextualization, and the making relevant of

³¹ Although the quote about the moral universe is most often attributed to Rev. Dr. Martin Luther King, Jr., he was quoting Unitarian Theodore Parker.

sacred texts, rituals, and oral traditions. The United Church of Christ reflects their living tradition with their current slogan “God is Still Speaking.”³² The Quaker religion’s belief in the unmediated engagement of God in each person, coupled with their commitment to lives that reflect that divine engagement, reflect a tradition that is alive.³³ And Catholicism, arguably the least likely to give in to societal-based pressures to change, has made groundbreaking moves in recent years as Pope Francis has shifted the church’s position on gay and lesbian people. This, a sign that Catholicism too, can be seen as a living tradition, responsive to a changing world. That said, Unitarian Universalism holds the idea of being a living tradition as a central tenet. UU theologian, James Luther Adams said “Religious liberalism depends on the principle that ‘revelation’ is continuous.”³⁴ The history of the faith reflects a consistent pattern of self-transformation with an ever-widening embrace of diversity and the social justice work required to support that stance.

UUism’s commitment to diversity in Unitarian Universalism extends beyond theological difference into race, ethnicity, affectional orientation, gender fluidity, physical and intellectual difference, socio-economic class and age, perhaps best reflects how it remains a living tradition. Unitarian Universalism acknowledges that

32 United Church of Christ, accessed February 19, 2017, <http://www.ucc.org/>.

33 “A Gateway to Quakerism,” Quaker Information Center, accessed February 19, 2017 <http://quakerinfo.org/quakerism/beliefs>.

34 James Luther Adams, “Guiding Principles for a Free Faith,” in *On Being Human, Religiously: Selected Essays in Religion and Society*, ed. Max Stackhouse (Boston: Beacon Press, 1976), 12-20.

the work is unfinished and its completion perhaps never fully attainable; yet the quest remains central to UU identity and the fulfillment of living faithful lives. Congregations are encouraged to participate in that work on an on-going basis. Programs and workshops are offered by the UUA and regional support staff to help congregations challenge biases and systems of oppression within themselves and their congregational systems. In addition to altering congregational and worship life to be more inclusive, these programs also prepare congregations and ministers to further the work as leaders in their communities. Focused programs help keep the 'living' part of the UU Living Tradition alive. Consider, for example, the Welcoming Congregation, which led congregations through a year-long (or more) process to live into their commitment to achieve "radical inclusion" of people who are lesbian, gay, bisexual, transgender, and queer. Consider also the Accessibility and Inclusion Ministry (AIM) Certification Program, which focuses on "welcoming, embracing, integrating, and supporting people with disabilities and their families into our congregations." These are ongoing influences on the living tradition.³⁵

I hold up this aspect of the UU religion because fulfilling the call to be alive in the UU context requires a depth of trust and commitment not readily found in all UU congregational settings. In the UU context it is also not mandated, funded, or even led from above. As self-governing, self-funded, and self-motivated

³⁵ "Welcoming Congregations and Accessibility and Inclusion Ministry," UUA, accessed February 19, 2017, <http://www.uua.org/lgbtq/welcoming/program>.
<http://www.uua.org/accessibility/aim>.

institutions, It is incumbent upon the congregation and their lay and ordained leaders to keep the tradition alive. The LTM interviews reveal that the majority of LTM congregations were actively doing so and LTM ministers pointed to the depth of trust, the depth of knowing one another, and time as contributing factors.

I also hold up this central aspect of Unitarian Universalism as important to this topic because, just as living our faith requires constant self-reflection, we need to be self-reflective, self-correcting, and self-motivating regarding how we best tend the health of our congregations. Just as we examine our progress on the journey toward being more inclusive in various ways, we must be courageous in doing an honest and thorough examination of the impact of length of ministry on the fulfillment of our collective call to live UUism. This study is part of that self-reflection. The more difficult part of fulfilling that aspiration is to be self-correcting and self-motivating. For this, Unitarian Universalists, lacking divine instruction or an authoritative mandate from any headquarters, benefit from an explicit connection to compelling stakes. With this in mind, I offer a third theological thread.

The Power of Voluntary Associations

The third theological thread is the power of voluntary association – what people coming together to form an organization with a common interest can achieve. In the summer of 1927, Unitarian James Luther Adams (JLA) attended a Nazi festival in Nuremburg. This was six years after Hitler became head of the movement and six years before the party came into power. Adam's experience

that day was so startling that he attributes it to marking the beginning of a shift in his life that would lead to a conversion experience – his own.³⁶ He reported a large crowd and thousands of Nazis singing while brass bands played. He saw the swastika symbol all around and asked someone what it meant. Within moments he found himself in a heated debate with Nazi supporters as he pushed them on the Jewish question. Suddenly, he was pulled out of the crowd and taken down an alley. He thought he was being arrested. Instead, it was a young man who yelled at him “Don’t you know that when you watch a parade in Germany today you either keep your mouth shut or you get your head bashed in?”³⁷ The young man had saved him.

JLA’s increased anti-war involvement and commitment to Unitarian ministry followed the experiences of that day hand-in-hand. Adams said he was haunted by the oft-spoken affirmation: “If only 1,000 of us in the late 20s had combined in heroic resistance, we could have stopped Hitler.”³⁸ JLA’s ministry and religious leadership reflected his belief that through the power of voluntary associations, history could and should be altered for the better. In the context of our democracy, he was bold in holding all people accountable for history as it unfolds. Referring to

36 James Luther Adams, *The Evolution of My Social Concern*. UUA, accessed February 20, 2017, <http://www.uua.org/re/tapestry/adults/movesus/workshop7/conversion-experience>.

37 Ibid.

38 The Conversion Experience of James Luther Adams: accessed February 15, 2016, <http://www.uua.org/re/tapestry/adults/movesus/workshop7/282705.shtml>.

the early experience at the Nazi rally where he was told to take care or he could get his head bashed in, he said “In the democratic society the nonparticipating citizens bash their own heads in.”³⁹ I believe JLA’s call to his fellow Unitarians to claim their power through the voluntary associations we create as congregations, and as a faith, offer this study on the benefits of LTMs a sense of urgency and a sense of hope.

Today we are again faced with serious threats to humanity. Our faith calls us to participate in the battles for racial equity, class equality, eco-justice, peace, and an affirmation of all those who continue to be marginalized and placed in harm’s way. Just as Adams, dedicated much of his life to promoting social justice through associational infrastructures, UUs are offered the same opportunity.

Adams, as theologian and ethicist, dedicated much of his life to promoting social justice through associational infrastructures. I align myself with Adams in the belief that, in relationship with one another, we can and should work to change our world. JLA called UUism the “prophethood of all believers” in which the people understood themselves to be called to examine their times through the lens of their faith and then to act to make history:

The prophetic liberal church is the church in which all members share the common responsibility to attempt to foresee the consequences of human behaviour with the intention of making history in place of merely being pushed around by it. Only through the [prophethood] of all believers can we

³⁹ James Luther Adams, “The Prophethood of all Believers,” in *The Essential James Luther Adams*, ed. George K. Beach (Boston: Skinner House Books, 1998), 263.

together foresee doom and mend our common ways “in place of merely being pushed around by it.”⁴⁰

Prophethood requires a community of trust. Courageous resistance in the face of evil does too. James Luther Adams’ experience and leadership call us to be quite sure that our congregations are willing and able to fulfill the call of history.

In summary, all three theological threads point to the importance of relationality. The covenant calls us all to join together on the journey, the living tradition calls us to be active participants in work toward progress, and the need for, and power of, our participation in the world are made clear in the work of JLA’s voluntary association.

Long-term Ministry

Armed with wisdom from leadership and organizational development models, grounded in our theology and understanding the stakes to be high, I sought out voices from the past to see if data existed about LTMs, and in particular about LTMs in the UUA. Because I found no mention of LTMs in my seminary experience, my internship experience, or my experience with the UUA credentialing process, I was not surprised that I was unable to find much about it in general, and I found nothing written specific to long-term UU ministries. Two studies I found utilized interviews from ministers did not include ministers from

40 Adams, *The Essential James Luther Adams*, 112.

Unitarian Universalism. Another, The Alban Institute study of long pastorates, included seven UU ministers in a process that engaged a total of thirty-three clergy and twenty-nine spouses. That study began in 1979 and was led by Roy Oswald. He and his fellow researchers admitted an initial negative assumption about long-term pastorates, yet emerged with the conclusion:

While all the disadvantages of a long pastorate can be managed with skill and training, few of the enormous advantages of a long pastorate are available to shorter ministries.⁴¹

That is LTMs provide access to advantages unavailable to STMs. While they are not always achieved, there are things that can only be achieved in LTMs. This is certainly supported by the LTM interviews. One said “It just wasn’t possible to go there [referencing a conflict process], before we had seen each other through thick and thin, We knew each other so well by that point.”

Oswald’s work was of particular interest to me during my search for existing literature, because his name came up in several of the first round interviews in 2015. Two commented “Of course you know the work of Roy Oswald” and another referenced attending a workshop on long-term pastorates run by Oswald.

Oswald’s work is considered seminal. It offers perspectives on what things contribute to successful LTMs (sabbatical, pastor-parish relations committee) and also potential pitfalls associated with LTMs that lead to failure. The pitfalls include clergy burnout, over-identification between clergy and congregation, stagnation,

⁴¹ Roy M. Oswald et al., *New Visions for the Long Pastorate* (Durham, NC: Alban Institute, 1983), 7.

distancing between clergy and a growing number of congregants, a feeling of stuck-ness for clergy and/or congregation, negative results for the minister's family. Oswald emphasizes that benefits and disadvantages are potential rather than predictive. That is, not all LTMs achieve the benefits that are possible to LTMs; however, they have a chance to achieve them and STMs do not have that chance. This nuanced claim was also supported by my interviews. My interviews reflected that some benefits made possible in LTMs were achieved in one congregation but not in another. My hope is that all of our Unitarian Universalist LTMs, including the one I serve, are able to achieve more of the possible benefits, especially when the LTMs are clear about what those benefits are and how to create systems of support to help make those benefits a reality.

Oswald's continued contributions through Alban Institute include advice for new ministries, sabbatical practices, terminations and many other aspects of ministry. The fact that his book, *New Visions for the Long Pastorate*, is no longer in print, despite many references by my interview subjects and other articles on LTMs, is puzzling. A possibility is that it speaks to the absence of institutional support. If UUism lacks a commitment to support, promote, and nurture LTMs, it should not be a surprise to find that reflected in the lack of publications, workshops, and consulting services.

As I mentioned earlier, Oswald's book was named by several of the interviewees as important, and two had attended Oswald's *Successful Long-Term*

Pastorate's workshop and found it helpful. Much of Oswald's more recent work carries pieces of his work on LTMs. For example, when he focuses on start-ups in *New Beginnings: A Pastorate Start-Up Workbook*, he continues to offer suggestions that affirm his earlier findings about successful long-term pastorates. He suggests building support systems, establishing effective feedback systems, being clear on role definition, and other suggestions, all of which offer new pastors a set of best practices that also contribute to successful LTMs.⁴² Likewise, his work on sabbaticals affirms the need for rest and renewal, which he also highlighted in his work on LTMs.⁴³

Other voices have entered the conversation, each noting with alarm the trend toward shorter-term ministries and clergy leaving the vocation entirely. Many of these build upon Oswald's work and cite the six benefits he attributes to LTMs: the greater possibility of more in-depth knowledge of and relationships between clergy and congregants, and clergy and congregation; the greater possibility of knowledge and experience together through personal and communal growth; events not possible during shorter tenures but available because of continuity and stability of leadership and programs; possibilities for greater personal and spiritual growth of clergy and congregation; the possibility for greater participation by the clergy in the community; and, additional personal benefits for the clergy and their

42 Oswald et al., *New Visions for the Long Pastorate*, 72-79.

43 Ibid., 60-61.

family.⁴⁴

George Barna stated: "The average tenure of a pastor in Protestant churches has declined to just 4 years—even though studies consistently show that pastors experience their most productive and influential ministry in years five through fourteen of their pastorate."⁴⁵ Much of Barna's work focuses on what he sees as unrealistic expectations of the minister by the congregation. "The expectations set for most pastors doom them to failure before they begin their work."⁴⁶ His assessment, informed by a time management study of clergy, ties clergy burnout to an expectation that a minister be all things to all people and the ensuing frustration that clergy experience as they attempt to achieve the impossible.

In addition to offering data on turnover and insights about clergy burnout, Barna's work challenges churches to recognize leadership skills as central to the success of a pastorate. He writes, "In recent years I have observed that most churches confuse superb preaching with effective leadership."⁴⁷ He affirms the benefits of the gifted preacher, but adds: "However, most of the great preachers in

44 Ibid., 30.

45 George Barna, *The Second Coming of the Church* (Nashville, TN: Thomas Nelson, 1998), location 192, Kindle.

46 George Barna, *The Habits of Highly Effective Churches: How to Have a Ministry that Transforms* (Grand Rapids, MI: Baker Books, 1999), location 390, Kindle.

47 Barna, *The Habits of Highly Effective Churches*, location 329, Kindle.

America are not great leaders – nor do they aspire to be.”⁴⁸ Barna’s point was not to dissuade churches from calling great preachers. Rather, he urged churches to understand the necessity of having an effective leader above all else, to do all they could to ensure that leader’s success, and to help foster a culture of change as they move forward into the future together.

Several years ago a study by a large Protestant denomination found a startling relationship between the lengths of time pastors had been in their churches, and the growth or decline of those churches.⁴⁹ Their finding is informative: approximately 3/4 of the growing churches were being led by pastors who had been in their church more than four years, while 2/3 of the declining churches were being led by pastors who had been in their church less than four years. They concluded: “Long-term pastorates do not guarantee that a church will grow. But short-term pastorates essentially guarantee that a church will not grow.”⁵⁰

This finding alone should garner the attention of all UU clergy, congregations, and supporting institutions. It affirms Oswald’s 1983 finding:

48 Ibid.

49 The study included almost 200 pastors from 24 different Protestant denominations.

50 Gary L, McIntosh and Charles Arn, *What Every Pastor Should Know* (Grand Rapids, MI: BakerBooks, 2013), 173.

It takes time for clergy to gain the kind of credibility, trust and knowledge necessary for such major growth. This includes credibility and respect within the community as well as the parish.⁵¹

Oswald also cites Robert Schuller of the Church Growth Institute's observation that:

few congregations experience major spurts in growth until the pastor has been there for a minimum of five to eight years. Most significant growth happens when a pastor has been in place for at least ten years.⁵²

With the stakes of church vitality this high, one is startled that so little attention has been paid to LTMs across denominations. Roy Oswald's work was in 1983. Nineteen years were to pass before Glen Ludwig offered *In It for the Long Haul*, also produced by Alban Institute. Oswald lauded the book as long overdue, saying: "Although longer pastorates continue to be highly valued, nothing has been in print to put in people's hands detailing the strengths and potential liabilities of a long pastorate."⁵³ Oswald notes the continued "bad rap" that LTMs receive within denominational bodies, and he placed hope in Ludwig's contribution that clergy and lay leaders would find value in LTMs and see a pathway to achieve them.

Ludwig's study affirmed the importance of building trust over time, the necessity of self-care, and the vital role of shared leadership in LTMs. It also addressed a challenge that is unique to LTMs: what he called 'The Two

51 Oswald et al., *New Visions for the Long Pastorate*, 88.

52 Ibid.

53 Ludwig, *In It For The Long Haul*, i.

Congregations.”⁵⁴ One congregation is the worshipping community who are not very engaged in issues of leadership, politics, or decision making. The other are those who are very involved. The challenge in LTMs is that core naturally begins to shrink over time. “The core becomes smaller and more homogenous,” says Ludwig and risks reflecting the “age, value system, theology, and even the working philosophy of the long-term pastor.”⁵⁵ The remedy according to Ludwig is to be vigilant to encourage diversity in leadership.

Ludwig brings further value to the conversation with suggestions for leading staff teams in LTMs and also supporting lay leadership. Like Barna, he looks to leadership theory, in this case invoking the perspectives of Peter Drucker in offering clarity on the difference between efficiency (getting things done right) and effectiveness (getting the right things done).⁵⁶ Within this perspective on leadership theory, he holds up the necessity of vision, measuring progress, and effective delegation.

In summary, the few authors who have taken time to study long-term pastorates agree that the positives far outweigh the possible negatives. They believe there are specific factors that contribute to the longevity of ministries and pitfalls to avoid. Oswald’s focus on support systems, including spiritual and

54 Ibid., 49.

55 Ibid., 50.

56 Ludwig, *In It For The Long Haul*, 74.

sabbatical practices, coupled with Ludwig's additional focus on building leadership capacity are affirmed by the LTM interviews and my own experience.

Chapter 3:

Pastoral Pay-Dirt

One of the most difficult things as an interviewer in this thesis research was to avoid rushing back to my own congregation to implement any one of the many great ideas interviewees shared as they were answering questions (e.g., evaluation models, leadership development, etc.). I also found it difficult to refrain from sharing some of the specific things that were working well for me and the LTM congregation I serve (e.g., Committee on Ministry model, Visioning, etc.). I found it helpful to recall that I had my own ethnography, which would come into play later in the project. I also reminded myself that my initial role was to be an interviewer, and the analysis would follow. To help manage my own eagerness, however, I began to use the pay-dirt metaphor. As any gem came along I would note it on a pad, aptly titled 'The Mine!' While 'The Mine' included a number of great ideas captured from the interviews, what follows are those themes that arose across most or all of the LTM interviews. These were the most precious gems of all.

This chapter includes two sections. First, in Lessons from the Field, the interviewees tell how they and the congregations they serve have experienced the benefits of their LTMs. Their voices and the accompanying analysis show how the longevity of their ministry is linked to each of the benefits. I have gathered the gems described above into five themes: stability, trust, vision, resiliency, and spiritual maturity. Using testimony from the interviewees in dialogue with the literature this

section provides an analysis of what lessons are useful for others seeking to achieve the gifts available through LTMs.

In the second part of this chapter, *Living the Questions*, I delve into my own experience as a minister of an LTM. My story begins with the questions I brought into this study in hopes that the shared experiences of ministry at UUCM would shed light on this topic, but also that I might learn how to best serve UUCM in our continued LTM.

Lessons from the Field

The following section discusses each of the five themes that emerged from the interviews. I have included quotes that are drawn directly from the interviews and were in response to the interview questions found in Appendix B. As the interview process was opened ended, the interviewees at times provided reflections that extended beyond the question. That data was included in the analysis as well as it often illuminated a common theme or offered insights into one specific LTM that might prove to be beneficial to other LTMs.

References to “the interviews” includes two sets: round one in the summer of 2015 and round two in January of 2017. The questions for both were grouped into six basic sections: (1) factual information about the interviewee’s LTM setting (e.g. size of congregation, make-up of staff, number of years the interviewee had served, number of years the previously settled minister had served, and whether the previously settled minister was named Emeritus); (2) information about the

impact of the previous LTM from the perspective of the current LTM (e.g., challenges and benefits you encountered that you would attribute to the longevity of the minister's service); (3) reflections on moments and stages of the LTM minister's years of service (e.g., when you stopped being the 'new minister,' the different periods of your ministry with this congregation, and the culture and changes in the congregation, board of leaders, and relationships of both with the minister; (4) a mix of factual and subjective questions about congregational life and leadership (e.g., regarding the Committee on Ministry model, roles of leaders and leadership development, management of conflict and boundaries; (5) personal reflections about the spiritual life and decision making process of the LTM minister (e.g. practices that ground you, intentions for your ministry, factors that facilitate or complicate a long stay); and (6) conclusions and recommendations from the LTM minister (e.g., positives/negatives for you and for your congregation in this long-term ministry, advice you have for ministers, seminarians, and congregations considering LTMs).⁵⁷

Stability

A consistent theme across all of the interviews was that LTMs correlate with stability. Some of that stability is the simple absence of disruptions that arise out of transitions – the complex ending of one pastorate and beginning of a new one. In Unitarian Universalism the process of transition is generally four-fold. The

⁵⁷ The complete set of questions appears in Appendix B.

current minister and leadership focus on a healthy departure. The congregational leadership participates in an interview process for an interim minister.⁵⁸ The congregation establishes a Transition Committee to work with the interim minister. The congregation elects a Search Committee. The process requires a great deal of volunteer time on the part of the committee members and remaining staff. The entire congregation is usually involved in surveys, workshops and ongoing conversation. Meanwhile the Board leadership, staff and other leaders prepare to welcome not one, but two ministers who might arrive with entirely different styles than the outgoing minister. While this is somewhat expected with an interim period, it can be disruptive and can engender conflict. Also, the departure may have been costly due to owed sabbatical time or other unanticipated costs. Projects may be put on hold because they were championed by the outgoing minister or because it is deemed wiser to wait for the arrival of the new settled minister. Times of transition are often marked with a drop in attendance until 'things shake out.' It is also a time in which, should the opportunity present itself, dysfunctional players previously marginalized by the prior ministry emerge seeking positions of leadership (e.g., Search Committee, Transition Committee, Board). One of the LTM lay leaders captured this theme, expressing succinctly the views expressed by several interviewees: "Finding and truly settling a new minister takes

⁵⁸ In UUism the trend is for interims to serve for one or two years. Most often a two-year interim is completed by one minister but sometimes the interim period consists of two different ministers, each serving one year.

extraordinary energy from the congregation. With long ministries, this energy can be focused elsewhere – mission, programs, capital projects, etc.”

Contrast this scenario with that of a congregation that is mostly certain that the minister will remain for at least ten years. None of the efforts and resources listed above are expended. Projects can continue, with changes that are relevant to the projects themselves and the church’s ongoing ministry. Boundaries around dysfunctional congregants remain intact, and volunteer and staff resources are not derailed from current efforts. Additionally, relational aspects of congregational life are positively impacted as individual relationships and institutional relationships are afforded necessary time to mature. Individual relationships with congregants mature as the minister gets to know each congregant more and congregants get to know the minister better. One interviewee describes this dynamic in a story: “What could have been experienced as a really nasty encounter years earlier, was totally different, because I knew him so well. And, I suppose, because he knew me so well too. We still had to talk, but we knew we cared about one another and it made all the difference.” This story was repeated over and over throughout the interviews. Additionally, individual relationships between the minister and other community leaders, including other religious leaders, grow through time spent together in interfaith and secular settings. Institutional relationships mature as lay leaders and the minister move through challenges and successes together. “Once we realized you really weren’t leaving, I think we trusted you to handle our skeletons” said one LTM quoting a congregational lay leader.

Quite a few interviewees reported a moment when lay leaders and/or congregants worried they were leaving. The times most often noted was following a sabbatical and/or the minister's approach to year five, when the laity begin to wonder, "Isn't that when ministers go?" Some of the lay leaders actually expected an LTM because of an earlier LTM experience. One pastor expressed this well: "The congregation had the expectation the minister would stick around – through good and hard times. They believed I was sticking around and there was never any energy about ending a ministry to find a new one."

An important contributing factor to stability in LTMs is the shared growth that occurs as minister and leaders participate in the governance of the congregation. Regardless of governance structure, each of the LTM ministers played an important role in recruiting leaders and supporting them. The involvement ranged from subtle encouragement to direct recruitment. Most engaged in learning opportunities as well, increasing personal skills as well as the knowledge base of the congregation. As volunteer lay leaders necessarily transition as part of the governance structure, a long-term pastor is uniquely positioned to help build cultural norms around leadership and ensure that those norms are continued from board to board. In a LTM, with the rotation of leaders over time, the longevity of the pastoral support and guidance of leaders allows for a larger and larger group of leaders to share those norms. When the minister does depart, the critical mass of lay leaders with lived experience of how they lead together with the minister and in relationship to the congregation is solid. Some, but not all of the LTM ministers,

intentionally engaged leaders in learning experiences. In doing so, the capacity of the congregation increased even more as more people became clear about the congregational vision and the tools being used to govern.

Trust

Perhaps the most powerful opportunity LTMs present is the ability to achieve a level of trust that is powerful enough to sustain congregation and minister through difficult times and bathe them together in times of glory. While respect of the office of 'minister' was noted as either a gift from earlier LTMs or part of an existing culture, trust was different and had to be earned. Respect for the office was more about role clarity, an organizational chart, and by-laws. Trust was about relationship.

All of the interviews reflected a recognition that, with years of getting to know one another, trust grew exponentially and trust was mutual. Trust arose from risking together and not always succeeding. It came from disappointing one another and not shying away from the hard discussions that must follow to stay in covenant. Longevity allows for a deeper knowing of each other that transcends role boundaries without violating those boundaries. In several cases, personal tragedy, either in the minister's life or that of the congregation, create spaces for shared grief. One minister managing the loss of a young member shared: "They realized that I had lost him too. They saw me as human. We were able to take things deeper." Another noted "there was something powerful that came with

knowing I wasn't going to leave." One other waited patiently, aware that trust was growing: "I had heard from The Alban Institute that it takes about eight years until you finally come into your power. I made a note of that and could see that happening."

While short-term pastors may encounter this sacred level of trust with parishioners they have companioned through loss and grief, it is the long-time pastorate who experiences this level of trust on a corporate level. In a healthy LTM, trust also builds for the minister. Knowing the lay leaders and being known opens the door for more frank conversation. One lay leader offered, "A definite advantage to a long-term ministry is time for a minister to get to know you and you to get to know them." This person added that the minister "moved carefully at first and, as we all became more comfortable with the minister and knew that the minister would offer wise counsel, we have been happy to have the minister take on the role as church leader as well as minister." This reflection emerged consistently in the interviews with LTM ministers.

Ministers of LTMs have time to sort out issues of authority and are better able to pick battles more effectively. Those issues may be internal to the minister as they come into their own understanding of ministerial authority within the organization and their call to the larger faith. But the issues will also be with their governing board, with an ever-changing slate of lay leaders, with individual congregants, and with people in the larger community. Usually the LTM has

experienced at least a test or two of that authority – every year. In some cases the minister has had the support of the leadership and, in other cases, the minister may not have been supported. In the healthy LTM, interviewees report that everybody stayed in dialogue regardless of outcome, and a high level of respect and kindness was present. One interviewee spoke of a challenge to his authority that involved a large donor wishing the minister would not share political views from the pulpit. Because of the shared trust, the minister was approachable by the congregant, and the congregant was able to share his views frankly, with kindness, and with respect. The minister was able to hear the perspective and lived experience of the congregant, with kindness and with respect. The outcome didn't necessarily result in a change on the part of the minister or the congregant but, because the relationship allowed the communication, both remained equally committed to the congregation and to their relationship with each other. Unlike so many ministries in which congregants' and ministers' actions are tied to setting precedent or 'winning' or 'positioning,' the two had well established trust and respect and the conversation itself was the desired outcome.

Vision

LTM's offer ministers and congregations time to reflect on where they have been, assess where they are presently, and imagine where they might be in the future. That process takes time. As one LTM interviewee said "It takes time to go anywhere." Management guru, James Collins, concurs. In his books *Built to Last*

and *Good to Great*, Collins makes clear that successful organizations, whether for profit or non-profit, cast visions, monitor visions, and achieve visions longer than the five to seven year average UU ministry. While length of pastorate in UUism is not officially tracked, the number generally accepted in collegial conversations, and affirmed in many of these interviews, was five to seven years.⁵⁹ A report in 1998, though not specific to UUism, referenced a decline to an average of four years.⁶⁰ These short-term ministries, coupled with the constant turn-over of lay leaders in UU congregations, present large barriers to any visioning process. That's even without considering the added derailment I've noted that comes with transition (i.e. volunteers needs for search committees, transition teams, etc.).

Collins points out that vision requires attention over more than our norm of five to seven years but also that vision cannot rest solely with the top leader. "All individual leaders, no matter how charismatic or visionary, eventually die;" and "all "great ideas" – eventually become obsolete."⁶¹ Vision must not change with the arrival of a new minister but be invitational to the newly settled minister. Nor should vision disappear with a departing minister, leaving a void dependent upon the next minister's arrival, interest and capability.

59 The UUA was unable to provide length-of-pastorate information.

60 George Barna, *The Second Coming of the Church* (Osprey, FL: Thomas Nelson Publishing, 1998), 2.

61 James C. Collins, and Jerry I. Porras. *Built to Last: Successful Habits of Visionary Companies* (New York: Harper Collins, 2002), 2.

The challenge for us is to develop and nurture systems that solidify vision in a manner that it allows it to reside in the bones of the congregation, remain intact over the course of multiple ministries, survive departing ministers, and welcome new ones into leadership. This is the task of LTMs and a key distinction between LTMs that are impossible to follow and those that welcome the next LTM. In the impossible to follow LTM, whether by choice or default, the vision is held solely by the minister. In the successful LTM, while the minister has played an important role in setting monitoring, and achieving that vision, the vision is of the congregation and remains with them, actively welcoming the next minister into shared leadership.

LTMs have the capacity to achieve what management guru Jim Collins calls 'Big, Hairy, Audacious Goals(BHAG).'⁶² Collins holds up the power of long-term visioning, and leadership. "You're not going to get it done in five years. A really good BHAG probably has a minimum length of about a decade, and may take longer than that. Two decades. Three decades. So time frames extend to where you are no longer managing for the quarter but for the quarter century."⁶³ He further points to the BHAG as so large that while it may never be fully achieved, a company or organization seeking it ends up being great because of its alignment with the core ideology of the organization.

⁶² Collins and Porras, *Built to Last*, 170.

⁶³ Ibid., 2.

While the term Big Hairy Audacious Goal did not emerge in the interviews, the belief that time facilitates a consistent movement forward to fulfill mission and vision did. Several of the interviewees held up the achievement of large shifts as satisfying achievements made possible only because of their length of ministry. Additionally, these interviewees pointed to the years following some of the larger changes as requiring a different sort of leadership as the congregation grew into the next chapter of their lives. One interviewee said:

There are big issues in ministry and there's no way to address those big issues unless you are willing to be there and lead during that growth. Little issues, yeah but biggest questions take time. To grow into this congregation's potential takes time.

Another noted:

Being here this long, I'm aware that I'm now minister to a board in which everyone joined after I began my ministry here. I'm no longer bright and shiny. I'm part of a trail of damage and disappointment [as well as achievement.] And in some ways, minister to two different congregations – the one that first called me and the emerging congregation. Each require different skills. [Together], we are on the forming edge to a new future.

This interviewee's naming of the 'forming edge to a new future' offered me a visual for another edge as well. There seems a moment of risk for ministers in particular in which the minister rests on the precipice of deeper commitment to moving through what might be considerable conflict or choosing to depart. What this interviewee, and others, helped me visualize is the grand prize on the other side of that edge. That edge marks the moment of either moving forward in solidifying

that vision or abandoning the quest for yet another day, yet another minister, and yet another group of lay leaders.

Resiliency

Perched there on the edge of ‘congregational life past’ and ‘congregational life future’ brings me to the question of what successful LTMs have learned that helps them move forward into uncertain futures together. Knowing that these moments will arise over and over again, I looked for what lessons these LTMs had embodied that made it clear they would not choose to opt out of relationship when conflict arose. I was not disappointed in finding answers. One minister named it as “the ability for there to be a focus on creating deeper trust, and living into that focus, letting go of everything else.” Another interviewee said “Let go of thinking ministry is supposed to make you happy. Find other things to make you happy and just do good ministry.” And another noted that holding up the factual narrative that “we can survive anything, together.” Each of these offered valuable pieces of how congregations can build up skills in overcoming challenges, thus feeding their own narrative of resiliency. But the interviewee who named how ministers might look at this offered a gem in regard to how ministers understand their call. This minister’s comment offered a direct challenge to our consumeristic perspective that we should be fulfilled and happy in our call. Although I did not set out to address the authenticity of call as it relates to LTMs, her comment speaks truth to me. I wonder if one of the challenges to LTMs, and a barrier to building resiliency as a parish

minister, is what I see as a mistaken understanding of call as rooted in the fulfillment of personal satisfaction rather than commitment to the UU faith and the values it promotes. If this is true, the challenge of LTMs begins before our ministers leave seminary.

For the purpose of this study, I am setting aside the question of whether or not ministers are on the whole committed to developing greater resiliency toward the end of strengthening congregational health and achieving LTMs and addressing how that is achieved. James Collins holds up resiliency in visionary companies as key to their success. He cites their ability to ‘bounce back from adversity’ as a key to their ability to attain long-term positive performance.⁶⁴ Present in each LTM story was the ability of the congregation to survive set-backs, *even if those set-backs were with the minister*. Even when past relationships with ministers were not viewed as glorious, longevity helped feed a culture of “we’ll be okay.” In one of the interviews, a minister described a situation in which one of the former ministers was in significant conflict with the congregation, yet, they all remained even when things got difficult. By doing so, two cultural norms of that specific congregation were affirmed: the congregation’s resiliency and the perspective that what’s important is that we move through this as a team. Resilience is expressed in the attitude that you do not try to kick out the minister when you have problems. Closely related to resilience is a sense of perspective,

⁶⁴ Collins and Porras, *Built to Last*, 4.

placing confidence in the congregation's and minister's commitment and ability to work out the problems because both are committed to working on the relationship. In this particular case, the minister did eventually depart, but not in the midst of the conflict. Rather, the congregation and pastor journeyed through the conflict together, arriving at the mutual decision that the ministry was coming to a close.

Congregations with a history of short-term ministries often affirm a different set of stories and norms. The common attitude is: if we don't like this minister, we can get another one; and/or if we only had a 'good' minister, things would finally go well. A pattern of conflict resolution anchored in an assumption that because we are in conflict the minister should or will leave, has limited options. At best, the focus shifts quickly from possible solutions to how to best end the relationship. At worst, the parting is chaotic, includes warring factions, engages legal counsel, and adds to a narrative that this is an unhealthy congregation. It may even serve as a warning to those ministers who might be considering that congregation, that this is a clergy killer congregation.

A common complaint from third party counselors (i.e. Good Offices) called into negotiations like this is that they wished they had been called sooner. A complexity noted by ministers is a lack of clarity of whose 'side' those counselors might be on. Regional staff may be contacted directly by congregational leadership and arrive as the advocates of the congregation rather than of the minister. The communication alone may add energy to the 'them vs. us' dynamic and the

ensuing consultation may feel combative to the minister. Conversely, a minister bringing in a Good Offices person to advocate on their behalf may create similar feelings of them vs. us in the congregation. The congregation may wonder who is looking out for them. The question I ask is “Who is looking out for the health of the congregation?” In successful LTMs the health of the congregation is always held high by the minister and mostly held high by the lay leadership. Key to LTM success are the relationships to covenant, communication, and course correction.

LTMs tend those relationships by committing to covenant, evaluation practices, and working with a Committee on Ministry or similar body or process to facilitate feedback.⁶⁵ Anonymous feedback was not generally permitted except in the case of congregation-wide surveys about specific areas of ministry (such as worship or music). In some of the LTM interviews, a practice of covenanting was present or planned on every level – congregation, staff, board, committee, and any gathering to discuss something important. These practices, shared in the interviews, affirmed a constant culture of “we can and will get through this because

⁶⁵ Committee on Ministries (in a prior iteration called Ministerial Relations Committees) are usually formed by the minister with Board approval. Once they are up and running, member selection is often done in consultation with sitting members. They tend to be small (three to four people) and meet monthly or as needed. In the pure Ministerial Relations model they ranged in form from a complaint bureau about the minister to a sounding board for the minister. Some continue to be a place where a congregant can come to talk about an issue with the minister. Best practices have the CoM superheroes of non-triangulation. They serve to help people talk directly to the minister about their issues. They refuse to pass along anonymous feedback. And they have broadened their scope to be tending the overall health of the ministry at large, rather than the minister.

we will engage honestly and kindly with one another.” It was not uncommon to hear references to individuals or groups being called back into covenant.

Resiliency at its best is closely tied to trust. Boards and ministers alike needed to be able to hear and process feedback that stretches and challenges their words and deeds. Boards need to be able to hear when a pastor experiences a lack of support at a critical moment, and they need to inquire what kind of support would be appropriate and needed. “It was a defining moment and I needed to know they had my back,” said one LTM minister who shared when a time of conflict almost resulted in a departure. That minister, and two others, credited the board supporting them in times of conflict as factors that helped them continue toward into their ministries becoming LTMs.

Ministers need to be able to hear when others think they are being heavy handed, distracted, or disappointing to one or more of the congregation. “I’ve learned to listen really well,” said one minister who said he survived because he honed his ability to sense anxiety and respond rapidly. “Critiques are always pretty polite,” he added along with “And I am always wondering if I need to be even more inviting of critique.”

In each case, all leaders need to be able to receive such feedback with the heart and health of the congregation central in the discussion. Resilience, when fed properly, also offers a gift to the continued ministry of the congregation. As one

interviewee put it: “These folks will miss me when I am gone but they will carry on. They’ve learned they can do it without me.”

Spiritual Maturity

Many LTM ministers described what I am calling spiritual maturity as a major benefit of LTMs. I could also describe this as greater faith development, spiritual deepening, or greater spiritual depth. I’ve chosen ‘spiritual maturity’ because it best reflects the references to a willingness and capacity to delve deeper into issues of faith development and spirituality and progress on that journey. Spiritual maturity, in the context of this paper, includes the creation of a container in which high levels of trust are established and deeper knowing of one another is achieved. This theme emerged consistently in the interviews as a benefit of LTMs. I will address it in this section in three ways: within the congregation; within the minister; and, within Unitarian Universalism.

Within the congregation. Some LTM ministers referred to the ability to ‘go deeper’ in worship services because the congregation trusted them more. Another commented that she and the congregation were able to “grow together spiritually and developmentally.” Still another, when describing the stages of the LTM, said that, in the most recent stage, the people had discovered “new ways of going deeper with each other and what our aspirations were.” Along similar lines, another minister was able to make annual themes normative, allowing the congregation to delve deeper into each theme.

This theme of spiritual maturation or going deeper was almost always explicitly connected to the increased level of the trust developed between the LTM minister and congregation as a whole and as individual congregants. As noted above, some recognized a spiritual deepening in the context of worship: “They trusted me to move into more embodied worship.” Many more noted that the deepening was something that went beyond worship. One minister described the congregation’s apparent feeling of being more connected in worship but also in congregational life. This pastor knew congregants more deeply and felt more deeply known as well. “I know more of the people and know a lot about their lives, their struggles, and their dreams.”

While time does not automatically and necessarily deepen faith, LTMs offer the potential for knowing one other over the course of many years and through many life experiences. While ministers in STMs may share loss, grief, birth, marriage, job changes, etc. with some congregants, ministers in LTMs are much more likely to bear witness to many more of these life experiences more often and with more people. Some ministers of LTMs shared how remarkable it was to span generations of congregants. One said “I’ve married people I’ve known since they were in kindergarten. And now I’ve dedicated their children and buried their parents.” This minister said they had achieved a cultural depth and said “I get a deep level of satisfaction knowing families so thoroughly. There’s a satisfaction of knowing people in all their complexities that you don’t get with short-term ministry.”

In LTM's the very culture of the congregation shifts toward deeper trust because of the length of time spent together and through life changes. The resulting opportunity for deeper knowing that follows includes the minister. In healthy LTM's the minister is now seen as fully human and a leader on the faith journey but also as fully committed to the people they serve. Congregants know the minister more deeply than when the minister first arrived. The minister has gained the respect and trust from many as an able companion through the most difficult of life's challenges, repeatedly. By staying, the LTM ministers have made it clear they are committed to the ministry of their congregations. The interviews reveal that proof of commitment has fostered greater trust. The lived experience of the LTM ministers ties that trust to the ability to create more opportunities for deep sharing and to have those opportunities met with increased spiritual maturity.

Within the minister. The increased spiritual maturity, or deepening, was rarely mentioned in the interviews as solely that of the congregation in response to the preaching, teaching, and leadership of the minister. Rather, increased spiritual maturity was accessible to the minister and that was also notable to the congregation. "We're able to go deeper because we know each other so well. Even the new people feel that sense of trust." An important piece of spiritual maturity for ministers, however, was accessed through sabbatical practice. The sabbatical patterns varied from LTM to LTM and this was often influenced by the size of the congregation. For example, multi-staff ministries tended to be more easily able to cover the senior minister's absence. Some ministers opted for smaller and more

frequent sabbaticals. While on sabbatical, some ministers published works while others used the time for rest and rejuvenation. Some took that time to discern directions for continued ministry with their current congregation.

What was consistent in each sabbatical practice was a complete break from the daily worries and tasks of the ministry. Regardless of the specific goals of the minister, this complete break allowed time during which the ministers could explore their call, their own faith development, and life beyond the parish. Within the context I've chosen to categorize this deepening, many used this time to further their own individual spiritual maturity.

The majority of ministers described the sabbatical as necessary and valuable and an important contributing factor to LTMs. Many said it allowed them to return ready to lead and share more deeply and with more clarity. The clarity varied from minister to minister. One interviewee said, "I realized I shouldn't waste time on the things I didn't do well and should instead focus on the things I did do well." Another said, "I understood what kind of minister I needed to be in order to lead my congregation into their next stage."⁶⁶

Lay leaders who were interviewed also held up sabbaticals as important for the minister but also for the congregation. One quoted the minister, who "always said that [our church] belongs to the congregation, not the minister." The person

⁶⁶ The standard for UU ministers is four weeks of vacation, four weeks of study leave and an accrual of a month per year to be used for a sabbatical. Sabbaticals are generally taken after every four to six years.

recognized that the minister's "absence during these times made the congregation ultimately stronger. We would have not known this with a shorter-term minister." I also note the high occurrence of ministers who noted their congregation worried that they would leave after the sabbatical and expressed relief afterwards when the minister remained. The fact that they remained often solidified the belief by the congregation that the minister was committed to their LTM.

Within Unitarian Universalism. A final aspect of spiritual maturity is how it is lived in the world beyond the church itself. Unitarian Universalism is well populated with individuals who do great works of justice, of small groups who tirelessly give of themselves toward a better tomorrow. But it is also true that many ministers are wary of arriving with large justice agendas because they feared overpowering the congregation with what might seem to be their personal agenda. Many congregation's social action efforts are spread thin with various small groups working on causes they find most important. When trust is present and vision cast, the ability for congregation and minister to come together full-force in support of a common cause maximizes the chances of transformative justice. In doing so, the core ideology of the congregation, and therefore Unitarian Universalism, is visible and vibrant in the community. With that clarity comes an invitation to those who may be seeking to learn more about UUism or perhaps to become a UU, to come into the congregation already clear on the existing vision and trust. I am not suggesting that newcomers immediately trust a minister or fellow congregants and risk the deep sharing and faithful risking that spiritual maturation offers in an LTM.

I am saying that, when newcomers experience the results of that spiritual maturation as their entry point into UUism, they discover an aspirational norm that invites them into a culture of seeking spiritual maturity. LTMs, therefore, offer the opportunity of increased spiritual maturity in the community in which they are located. Almost all of the LTMs interviewed have achieved projects well beyond their walls and in many cases are major leaders in their communities and in relationship with other congregations. Here we see the fertile ground for the Big Hairy Audacious Goals referenced in Chapter 2.

Increased spiritual maturity within the congregation, within the minister, and within the community does not occur to the same degree in all LTMs, but it does occur to some degree. Almost all of the interviews mentioned increased spiritual maturity within the congregation. All mentioned it within the minister. Many mentioned it within the community. My conclusion is that, because the LTMs build trust and increase knowledge of one another, the opportunity is available to all LTMs. The differing degrees are reasonably attributed to the distinct aspirations and needs of the LTM ministers and lay leaders, the varied needs to engage in conflict leading to resiliency, and the location of the ministries in regard to their local impact.

In conclusion, the pastoral pay-dirt of stability, trust, vision, resiliency, and spiritual maturity are consistently available across LTMs, and even more readily accessible in congregations where other LTMs were present in a congregation's

recent history. The interviews reflect that stability and trust were consistently high in the LTMs of the interviewees. Vision, resiliency, and spiritual maturity were each present as well but to varying degrees. For example, some LTMs achieved greater resiliency over the course of their LTM than others. Others may have made greater strides in the spiritual maturation of its members and minister. Still others achieved greater progress in their vision work. In all cases, some degree of each of these themes was clearly identifiable and attributable to longevity.

Living the Questions: My Ministry

As I mentioned in the preface, my own wish to serve my LTM as well as possible was an enormous motivating force in doing this research. Although I have always thought I would happily go to school forever, that's simply not true any longer. At nearly sixty, there is a long list of things I would rather be doing in my spare time. That said, the opportunity to participate in scholarly exploration in service to my ministry is deliciously compelling. Being able to take existing experiences in the parish into my studies and my studies back into the parish far exceeded my expectations of relevancy. I found myself in the midst of a three-year live experiment! Sharing the learning with my congregational leaders made the lessons exponential in value and having peer reviews throughout added depth to the process that would not have been available isolated in the parish. Deciding to include my own experience in this study also required a process. I employed the discipline of ethnography in order to best utilize my own experience. To do so, I

engaged in my own interview in the midst of the other LTM interviews. I recorded my answers in an audio file in order to then transcribe them as if I were listening to another LTM minister. My data, then became part of the pool that contributed to the themes of stability, trust, vision, resiliency, and spiritual maturity.

However, regardless of the placement of my story, as data, I am equally clear that the following questions traveled with me throughout this entire process:

- What things am I doing that contribute to this being an LTM?
- What things is UUCM doing that contribute to this being an LTM?
- What things are we doing together that contribute to this being an LTM?
- Are there things that I can learn through this research that will benefit our ministry together and help position UUCM to continue to have LTMs after my departure?
- And ultimately: Are LTMs good for congregations? Ministers? UUism?

I've noted my arrival at this research with a bias that effective LTMs were a good thing. However, I was appropriately challenged by a senior colleague (and one of the interviewees) to be open to learning that they were not, and I believe that openness was present in this work.

I did not understand "effective" to be measured by the popularity of the minister or the growth of the congregation in numbers or operating budget. Rather, an effective LTM was one in which the identity of the congregation was not overly defined by the relationship of the specific minister with his/her/per congregation.

The manner I chose to hone in on effective LTMs was to find congregations that had repeated LTMs. By doing so I would be able to avoid those in which the minister was so overly identified as key to the ministry that they could not be followed easily. Often these were the longest serving ministries and seen as 'impossible to follow.' They were also cited by district and national leaders as reasons not to do LTMs.

Informed by the work of Tony Adams and Stacy Holman Jones in *Autoethnography: Understanding Qualitative Research*, I included my own experience as the minister of an LTM as input into my research. I mined the following stories from my ongoing LTM with the Unitarian Universalist Church of Marblehead (UUCM).⁶⁷ Each came readily to mind as I responded to the same interview questions I had asked the other LTM clergy interviewees. I share the first story, *Boundary, Boundary, Who Holds the Boundary* to draw attention to the importance of understanding, clarifying, and maintaining boundaries around clerical authority and power. My second story, *Yours, Mine, and Ours: The Ongoing Evolution of Shared Social Action*, appears in this thesis, as a personal reflection on the value of self-assessment and course corrections on the journey to becoming an effective LTM. *Claiming Authority* and *Where Are We Going* each answer parts of the question "What things are we doing together that contribute to

⁶⁷ Tony E. Adams, Stacy Holman Jones, and Carolyn Ellis, *Autoethnography: Understanding Qualitative Research* (New York: Oxford University Press, 2015), location 143-144, Kindle.

this being an LTM?” The first tells a story of navigating conflict and the second shares our recent, and currently active, visioning process.

Each story is told from my perspective only and for the purpose of this research alone. All the people involved are good people, who like me, chose a path. I illumine our shared journeys for the purpose of learning how to better serve our faith and I appreciate that different perspectives of these events may exist.

Boundary, Boundary, Who Holds the Boundary?

In August of my first year, the former settled minister of the congregation called to ask that our choir, choir director and I come to participate in a service she was planning to mark her retirement from UU ministry. The service was to be held at the same time as our worship service on the third Sunday of our new ministry. The minister had a strong following in the congregation and had been diagnosed with a terminal disease. I offered my blessing to the choir and choir director who were eager to participate. I declined the invitation to attend. I focused on what our Sundays service should look like given the challenge that some would be in attendance elsewhere. By the time the Sunday service arrived it was clear many had received personal invitations to attend the former minister’s retirement service.⁶⁸ Others had not. When Sunday arrived, some members of the

⁶⁸ In the context of this thesis, this story is not offered as part of the ongoing conversation about how ministers should or should not be in relationship with former congregants. It is also not offered as a negative commentary about a colleague. Ministry is complex. This former minister brought enormous gifts to UUCM. So did the assistant minister. The story, however, is important in regard to the larger question of what contributes to LTMs.

congregation attended the retirement service. More than half elected to attend the regular church service. In the weeks following these two services, much of my time was taken up by congregants requiring pastoral care. Some were upset because they attended the retirement service and were distressed over this minister's illness. Other attending the retirement service felt a loss because they were no longer part of the former minister's life. Some were insulted because they were not invited and others felt conflicted because they were invited. It was complicated and it quickly became clear that in many ways the ministry between the former minister and many congregants lacked closure. In the coming two years I was repeatedly engaged in boundary challenges regarding the relationship between the former minister and my current congregants, and the former minister and my ministry. I also found myself called pastorally to address grief around the former minister's departure and illness. Even the role the UUA may have played in the minister leaving UUCM for another congregation was called into question. Because some of the congregants considered themselves to be close friends with the former minister and others did not, there was an additional challenge of balancing the appropriate amount of time and energy on what some considered 'most important' and others considered 'least important'. To be clear, the former minister has brought many gifts to the congregation and was much beloved by many. Those considerable gifts, however, did not prevent the challenges I note above.

Navigating the intensity of the boundary issues was helped by an adherence to a consistent message that I was called to serve this congregation and that my

decisions would always be in that context. Further, I would be the same minister to all people. Despite arriving in a setting in which it was common for some congregants to be in 'friend' relationships with the minister, that would not be happening. Ever. I share this story as a major contributor to the health of the congregation and as a contributing factor to our LTM.

Yours, Mine and Ours: The Ongoing Evolution of Shared Social Action

I arrived at UUCM as a known social activist with a lengthy history of volunteerism and leadership within and outside of UUism. I had been involved with Special Olympics and communities with differently abled people nearly all of my life, been a leader in the relief efforts in New Orleans following hurricane Katrina, and was serving on the UUA Accessibilities Committee. I also became deeply engaged in our national antiracism and cross-cultural engagement work early in my ministry with UUCM. That was followed by leadership in the racial justice work with a particular focus on white privilege and heavy involvement in immigrant and refugee rights.

UUCM also enjoyed a rich history as a social activist church having been a sanctuary church during the Vietnam war, leaders in the interfaith community following 9-11, on the leading edge of the battle for marriage equality in Massachusetts, and much more. The church hosted a coffee house that welcomed activist voices, had an historic connection to supporting women and families in need, played an active role in a meals program and participated in an interfaith

covenant against hate. Their identity as a social activist church was not reliant upon any single minister. Their efforts had been at times minister-driven and at other times, congregant-driven. I would also come to learn the pews were full of people who were leaders in social justice work themselves. It was this history, in large part, that drew me to UUCM.

My arrival, despite the call being made in part because of our mutual social activism, was accompanied by my worry that it might overpower my ministry. I worried about the congregation being overly influenced by my social action agendas. Despite an already active engagement with hurricane relief work I did not suggest we participate, rather I waited until the Social Action team asked if we could plan a trip. I led two trips and supported a third. I made sure I was supportive of other efforts and rarely mentioned the work from the pulpit. I later heard from a Committee on Ministry member that ‘some people’ were sick of sermons about Katrina. This comment was made, despite my having preached about it only once. This perception would emerge several times during my earliest years and was a source of frustration that left me wary of what might be construed as too strong a hand in social action work. I found myself somewhat stymied as I struggled to find how to best support the Social Action work of UUCM, maintain the arc of my own activism, and respond appropriately to the all-about-social-action perception. The compartmentalization of each resulted in social action leaders within the congregation being frustrated by feeling left out of my efforts in the larger faith movement. I share this story as a way in which our LTM has afforded me the ability

to grow into a more effective model of engaging with the social justice work of the congregation and learn from the interviews of other LTMs.

Claiming Authority

Early on in my ministry, a challenge about where and how we would run a part of our youth program became a heated issue. There had been some transition in the leadership of the religious education program, and a strong group of leaders had valiantly taken on much of the leadership in prior years. When the new Director of Religious Education arrived, she had little say over the location of a program for our teens. Having come from a religious education background, I challenged the decision to hold it at another church during Sunday services. In a small congregation, it was counterintuitive to have any programming off site on a Sunday morning. When it became clear that changing the venue would not be a popular decision, I backed off but remarked it was for this single year only. Had I been holding the health of the congregation higher than my own discomfort I would have insisted the program be held in-house. Despite agreement on one-year only, the following year plans were made without the Director of Religious Education's (DRE's) knowledge and conflict erupted. By then a strong Committee on Ministry existed and space was made for all views to be heard. The decision to support the DRE's plans and keep that year's program in-house was not popular. I believed by keeping it in-house I was holding the health of the congregation as the highest priority. I remain clear on the wisdom of the decision but I also note it would have

been better to provide more space for conversation with the parents and youth lobbying for a different decision.

Moving through this conflict resulted in three outcomes that are in line with successful LTMS. First, the incident led to ongoing clarification of the role of the Committee on Ministry, extending beyond a Ministerial Relations Committee and, instead, serving the health of the congregation. Second, the congregation created an organizational chart detailing where authority rested for different matters. Finally, the church created a conflict resolution policy. Each of these proved to be beneficial in the ensuing years of ministry.

The Committee on Ministry continues to serve an important role at UUCM. They provide counsel to the minister but also offer counsel to the board on various issues, They model and promote a four-tiered response to any criticism, questions, concerns, or other feedback offered by a member of the congregation to the minister, other staff members, another leader or fellow congregant.

1. Please provide the feedback directly to the person(s) involved.
2. If you cannot do that, but would if a CoM member accompanied you, we will provide a CoM member to do that.
3. If you cannot do that, but are willing for me to share your name with CoM, I will bring this issue to CoM.

4. If you cannot do that, please refrain from discussing this as it is out of covenant. If you change your mind about one of the first three options, please let me know.

The fourth of these, is of course, the most difficult, but also most powerful in terms of connecting congregational and ministerial behaviors with UU theology. The group's motto is that we are here to feed health and starve dysfunction.

The creation of the organizational chart was laborious and benefited greatly from two board member working tirelessly to produce a document that would reflect the bylaws accurately and serve to answer any questions of authority. The board took great care in making sure the document was presented in several meetings and shared via email so all members and friends would see the results. The creation of the policy on conflict resolution received similar attention. The board was thorough in their discussion of the policy and as with the organizational chart, shared it widely.

While the conflict that led us to these three important developments, the CoM, the organizational chart, and the conflict resolution policy, could have been met in a more skilled manner by me, the results were important gifts to the LTM that we share together. We've not needed the conflict resolution policy. The organizational chart is hauled out from time to time, mostly to educate new board members. And, the CoM continues to meet monthly, enjoys autonomy from minister and board, and is very clear on their charge. I share this story as one that

best reflects how UUCM and I have worked together in service of the health of the congregation, and therefore contributed to a culture that sustains and nurtures our LTM.

Where Are We Going?

The call to vision work with UUCM came through my collaboration with one of the leaders. During my ministry, UUCM has enjoyed stellar leadership at the helm of the Board of Trustees. Each has brought different gifts and visions of their own. One in particular, was focused on our celebration of 300 years of existence. We met often to discuss plans over a two-year period. One such conversation delivered us to the certainty that even as we celebrated 300 years it was time to look toward the future with some deliberation. From that conversation, and while in the BU Doctor of Ministry in Transformational Leadership program, I was able to develop a visioning process. I presented the program to the Board, we made some changes, and we are now in our third year with a Visioning Team in place.

The Visioning Team (VT) met extensively and engaged the congregation over the course of the year leading up to the 300th anniversary. They held congregational meetings asking congregants to engage with each other regarding what the congregation meant to them in the past, how they believed it was seen in the community in the present, and, what they dreamed it might be in the future. The VT listened deeply, followed up with other questions and created additional opportunities to hear people. They analyzed the results and brought it into

conversation with studies about current trends in religious affiliation. They talked at length about their findings. Out of the process a draft vision emerged. They shared it with the lay leaders and then members of the congregation in many settings and made some changes based on the feedback. The congregation then voted to affirm that vision at their annual meeting.

Despite being told they were free to disband at the close of that process, the Visioning Team still meets. Their focus now is on action plans as tied to the Vision Statement. The statement itself now serves as a litmus test for any new programming ideas, funding discernments, and also worship. I hold up this story as evidence of one of the many gifts afforded us as an LTM.

Conclusions from AutoEthnography

I have arrived at this telling of my own story influenced by all I brought to the experiences I've written about, and I am further influenced by the telling of these stories themselves. It is with some risk I write explicitly about experiences with other colleagues and about issues for which not all colleagues agree. I do so because too often my experience of ministry is one of neglecting to examine our own behavior in relationship to the impact it has on congregational health - in this context, effective LTMs.

The study of autoethnography reminds me that my own cultural beliefs and formative experiences have impacted how I moved through these periods of my ministry. They influence how I share these stories today and the analysis I am

applying to them in this body of work. For these reasons I share a bit about my journey to this point. My own commitment to the centrality of the congregation as a valued entity comes from a lifelong familial relationship with UUism and congregational life. My passion about boundaries has emerged from witnessing the damage done by boundary abuses of congregational members with vendettas and from ministers who from my perspective abused relational boundaries to meet their own needs. The struggle to find a way toward a better relationship between my own social justice work and that of the congregation was fueled and hindered by my own needs to protect my social justice work. That protective urge itself was fueled by my own late arrival in understanding of how closely connected my life-long justice work with Special Olympics and my UU identity had always been. It was also fueled by the story above in which my social justice work felt damaged by the intersection of roles. And collision of an impulse to avoid conflict and to meet it head on comes from a similar collision of New England politeness-at-all-costs and being a witness to what happens to congregations when best practices and policies are not followed. Finally, the call to visioning emerged from my years in the field of organizational development and the coursework in the Doctor of Ministry program as well. As I move into the next chapter with my congregation, I do so with great anticipation for putting the lessons from this research into practice.

The intersection of this study and my ministry have been, by design, closely integrated in these past two and a half years. My LTM has benefitted in very specific manners from my participation in the Doctor of Ministry in Transformational

Leadership coursework. The vision process for UUCM was designed with the benefit of coursework in leadership and change theory, leadership from the Dean of Boston University School of Theology, the guest lecturers, and, the ministry and leadership of my peer colleagues in the program. The other required courses provided me with additional opportunities to explore my thesis as I moved more deeply into the research and engage questions and lessons in live manners while serving UUCM. Peer reviews throughout pushed me to look more closely at what I hope to achieve in my remaining years at UUCM and how I will work with leaders to actualize those hopes.

Just as my ministry at UUCM was present in the BU classrooms and online study environments, so too, was the BU coursework present at UUCM. Conversations with congregants during two of our monthly “Lunch Bunch” gatherings allowed me to hear their perspectives on the benefits of LTMs and ours in particular. It was affirming to hear how many have felt part of a cultural change over the course of our time together and we were able to talk about what we hoped to achieve together in the coming years. I’ve also brought data from the LTM interviews into board meetings, Visioning Team meetings, and my monthly meetings with our Committee on Ministry. Sometimes that has led us to explore something we might not otherwise have intended to study (e.g. various forms of assessments used in the LTMs); in other instances, we affirmed something that the interviews had identified as a positive contributor to LTMs (e.g. Our Committee on Ministry model). Now, as I move toward the conclusion of this doctoral program,

I am excited about sharing the findings, including the recommendations in Chapter 4, more fully. At UUCM, I anticipate that we will move into an assessment phase, looking at each of the recommendations to see where we might increase the health of our shared ministry, ensure the continued success of our LTM, and make way for LTMs of the future.

Chapter 4:

Conclusions: Recommendations and Moving Forward

I remember being relieved when, in year one or two in my present congregation, a senior colleague said, “Dear, you might be doing interim work.” I am grateful, however, that she and others provided support to get me through that difficult stretch. Because of that support, I survived the conflict and ultimately contributed to a change in culture that allowed me to serve today in the longest pastorate this congregation has enjoyed in nearly a century. That transformation, however, did not occur simply because I wished it into being, or even worked it into being. It occurred because lay leaders equally committed to our faith rose to meet the challenge with me.

Peter Senge’s work focuses on ‘leadership communities’ rather than ‘hero leaders.’⁶⁹ A commonality across all successful LTMs, and the experience of my own ethnographic exploration, was clarity that leadership was shared. Models of governance differed, as did size of congregation, settings, staff models, visions, and even how that leadership was shared. Conflict resolution practices were more developed in some of the congregations. Some of the LTMs did more visioning. Others did less but were perhaps more engaged in community relationships. What was common was the high level of belief that *“we were in this together.”*

⁶⁹ Senge and Roth, *A Fifth Discipline Resource*, 16.

As I move toward the conclusion of this thesis, I do so with some excitement about the future. One of my favorite benedictions comes from The Rev. Wayne Arnason, who said “Take courage friends. The way is often hard, the path is never clear, and the stakes are very high. Take courage. For deep down, there is another truth: you are not alone.”⁷⁰ As we move forward, at UUCM, and in our larger UU Association of congregations, this benediction connects Senge’s wisdom of shared leadership with the lived experience of the LTM interviews, and my own experience. But it does so much more. For me, Arnason’s words about the stakes and the need for courage speak to our call to courageous relevancy through congregational life and leadership in a world crying for positive change.

The stakes are as high as they were when the young James Luther Adams dedicated his life to voluntary association through Unitarian ministry and leadership in a world fighting against the evils of the Nazi regime. Then, as now, UU congregations have the ability to self-determine how we will live out our courageous relevancy. I believe our possibilities increase exponentially in LTMs. It is with this in mind I turn to the recommendations offered by the analysis of the interviews and ethnographic study. I also turn to my faith as I look toward the future. And I call upon my colleagues, the congregations we serve, and our UUA:

⁷⁰ Wayne B. Arnason, “Take Courage Friends,” in *Singing the Living Tradition*, ed. UUA (Boston: Unitarian Universalist Association, 1993), 698.

to consider effective LTMs a vital engine for the growth and strength of our faith; to encourage ministers and congregations to seek, prepare for, and nurture LTMs; and, to develop the resources to prioritize the health of LTMs through the development of resources and institutionalized systems of support.

Recommendations

I note these following recommendations are offered with the recognition that LTMs are most easily achieved when minister and congregational leadership are committed to an LTM as a shared goal. Lacking congregational support for that goal is not insurmountable but requires strategic planning to develop lay leadership commitment in order to progress. Lacking ministerial support for that goal is also not insurmountable but benefits from support from outside of the congregation. If, however, LTM, has already been ruled out by a minister, it is in the best interests of the congregation to strategize for an LTM with the next settled minister.

Recommendation 1: Hold the health of the congregation central.

If I were forced to name one thing that contributed most to successful LTMs and to the ability of congregations and ministers to live their faith in the world – this would be it: Hold the health of the congregation central at all times. This single factor is foundational to all else and calls ministers and congregants alike to their best selves in relationship to our call to live our faith authentically and accountably. Each of the LTM ministers made it clear either implicitly or explicitly that they held the health of the congregation above all else.

Michael Helms, pastor of First Baptist Church in Jefferson, GA, posed the question: “If pastors went to churches and ministered as if they were going to be there to the end of their ministries, and if congregants treated pastors as if they were going to be there that long, how might the relationships between the two change?”⁷¹ Bill Easom from 21st Century Strategies agrees, “Lead as if you’ll be there forever.”⁷²

My recommendation is a bit different. Rather than to lead as if the minister will be there forever, lead as if the congregation will be there forever. And in doing so, tend its health with the goal of the congregation outlasting everyone in the pews and at the board table and in the pulpit today.

The power of this perspective emerged in the interviews in a number of forms, most having to do with surviving conflict. One interviewee said:

I can point to a single moment, early on in my ministry when I realized the culture of the congregation was stronger than the will of a small group of dissenters. In the midst of a heated discussion, a member stood up and commented “Look, I’ve been here for over forty years now. And hopefully I’ll be here for a lot more. I haven’t liked every minister or even agreed

⁷¹ Michael Helms, How Your Church Benefits From a Long-Term Pastor, *Ethics Daily.Com: Challenging People of Faith to Advance the Common Good*, accessed July 23, 2015, <http://www.ethicsdaily.com/how-your-church-benefits-from-a-long-term-pastor-cms-20661>.

⁷² Bill Easom, Benefits of Long Term Tenures, *The Effective Church Group*, accessed July 23, 2015, <http://effectivechurch.com/benefits-of-long-tenure/>.

with everything they've done. But what's important is that this place was here before me and, if we do our jobs right, it will be here long after me. We need to make decisions based on what is best for it [the congregation] not what any of us wants as individuals. So, I get that you don't want that. But I agree with our minister. It's best for the congregation. So we should just do it.

Rev. Loren Mead, founder of The Alban Institute believes that our world needs strong, local congregations.⁷³ This research affirms that a commitment to LTMs is an embodiment of that belief. Mead does not say "strong ministers." While it's clear that the minister plays a vital role in nurturing congregational strength, my analysis of the data supports the perspective that the greatest leadership does not come in the form of charisma alone. Rather it comes in leading with congregational health as a goal. A charismatic leader may draw many followers but, without congregational health, when the leader departs, many will follow. Leaders committed to congregational health may draw fewer followers on the basis of charisma, but when those leaders depart, few will follow.

⁷³ Loren Mead, The importance of the local church. *Alban at Duke Divinity School*. (2014), accessed July 23, 2015, <https://alban.org/2014/09/25/loren-mead-still-stuck-on-the-importance-of-the-local-church/>.

Recommendation 2: Be explicit in tying the commitment to congregational health to our theology.

As a faith tradition, Unitarian Universalism itself does not look to creed or doctrine for unity. The tradition is by definition non-creedal with no theological test for membership. It is the covenantal community that calls UUs together and forward into the world. A challenge in the UU settings is that so many lay leaders arrive from business backgrounds. At times their eagerness to be involved and to serve brings useful skills, but also brings clear ideas on how things should be done. One interviewee said, “Any board president can pretty quickly undo years of good process.” While the governance model may be different in each ministerial setting, the danger of a sudden shift in how ministers and lay leaders collaborate seems to exist as a constant threat. Further, in a faith tradition that in itself was a rejection of an authoritarian relationship with God and the divine, UUism also draws some people who seem to arrive predisposed to question ministerial authority and even competency. Thus, all ministers, are likely to encounter challenges to their authority, challenges to t of decision-making and governance in their ministries, and ideas about how to best do things in the future.

Given that a key in successful LTMs is that all parties will hold the health of the congregation as a central value, doing so with grounding in UU theology reinforces the shared call to do so. All UU ministers and all UU congregations are called to this purpose as members of the faith community. Their commitment to the principles and purposes of UUism are explicit through membership as UU

congregations and ordination. The UUA, in turn, has the primary purpose to “serve the needs of its member congregations, organize new congregations, extend and strengthen Unitarian Universalist institutions and implement its principles”; thus, it is called to support efforts that congregations deem important as well.⁷⁴

In order to live into these covenants, congregations and ministers benefit from explicit reminders. These reminders, should be held by lay leaders, the minister, and the Committee on Ministry. They should be particularly be used in settings in which it is easy to forget that the minister and lay leaders are doing the work of the church. I find it far too easy myself, in the midst of a budget meeting or a conversation about a database, to recall why we are doing this work. When I am reminded, I often find the process changes. The reminder doesn't alter the task but it often changes how I and others engage in completing that task.

In the interviews, when I asked how leaders' souls were fed, many of the interviewees mentioned being sure to make meetings have a worshipful element, even if it was only a chalice lighting. Some mentioned the use of the phrase 'let's return to our covenant' during meetings and particularly during conflict. Where Committees on Ministries were in effect, some, but not all were engaged in covenant efforts with the congregations. In congregations where explicit covenants about behavior existed, the CoM might hold up that covenant as a reminder before

⁷⁴ “UUA Bylaws. Section C-2.2. Purposes,” UUA, accessed January 29, 2017, http://www.uua.org/sites/live-new.uua.org/files/uua_bylaws_2015.pdf.

a congregational meeting that they expect to be difficult. One interviewee mentioned that the CoM in their LTM preached about the covenant during a time of conflict. Another LTM engages newcomers in a conversation about the covenant in preparation for becoming a member.

Regardless of how the covenants are made real, I have concluded that the use of covenantal language is a major factor in how people, including the minister, in LTMs, are able to best connect their actions with the theological underpinnings that brought them to congregational life in the first place.

Recommendation 3: Maintain boundaries.

Keep boundaries that gift the congregation with strong clarity that you are the minister. Few of the 26 LTMs I interviewed maintained any friendships within the congregation. They loved all of the people but maintained consistent boundaries when it came to friendships. There were few exceptions. This is one of the more controversial recommendations. There have been cases in which ministers have dated congregants, socialized closely with congregants, even married a congregant. I maintain that boundaries that rule out each of those activities are part of the sacred call to hold the health of a congregation higher than personal desire. I don't expect to convert those who view this differently but hold fast to the argument that exceptions favor the minister and congregational members at risk. The risks are realized in the potential loss of a minister, the potential diminishing of relationship with other congregants, the potential loss of a

church if the relationship ends, potential damage to future relationships with ministers who maintain stronger boundaries, the diminishment of relationships from the perspective of other congregants who are not seen as friends of the minister, and potential risks in regard to decision making and conflict resolution processes within the congregation. The power dynamic at play exists regardless of intent and that power resides with the minister. It is up to UU clergy to fulfill relational needs beyond the love and friendship offered to all congregants elsewhere.

Recommendation 4: Speak truth and listen well.

An essential piece of successful LTMs is the ability for the minister, the lay leaders and the congregation to be able to hear one another well. This is not about pastoral care or adequate sound systems. Rather this is about the ability to create systems of effective feedback and use them well. Longevity does not ensure feedback will increase in either its authenticity or ease. As revealed in Roy Oswald's study, long-term pastorates may include the danger that with each year, providing feedback may become more difficult. He reported "It is a simple fact of life that it is most difficult to give painful feedback to a close friend or family member."⁷⁵ Yet, shared leadership, engaging in best practices around conflict and leadership, and growing together in spiritual maturity rely on the ability for everyone

⁷⁵ Oswald, *New Visions for the Long-Pastorate*, 63.

to be able to communicate well. My recommendation is four-fold and informed by the interviewee themes of resiliency and trust:

1. Create and maintain consistent boundaries thereby minimizing the conflict Oswald references above.
2. Use a Committee on Ministry model in which the CoM serves the health of the congregation. If a CoM does not exist, create one. If it exists in the form of a Ministerial Relations Committee and/or complaint department, disband it and create a CoM. Do not allow anonymous feedback but instead model a Right Relationship practice on all levels of leadership with a goal of equating membership with entering into a covenant that includes RR in all communications.
3. Establish and use regular systems of feedback in addition to the CoM. Ministers and other leaders should communicate frequently, using multiple methods to ensure over-communication. And, ministers and other leaders should create opportunities for feedback.

4. Establish and use a method for assessing the ministry, including but not limiting that assessment to the minister. LTM interviewees reported a wide range of methods of ministerial assessment. Most engaged a select group of leaders either from the Board, the Committee on Ministry, and/or representing various demographics of congregational life. Some were annual. Others were either every two or three years or not at all. Those who did not engage

in assessments stated they thought it was important and were looking for a model to use. All the LTM ministers, however, valued direct feedback and placed highest value on direct conversation. Assessments of the overall ministry of the congregation was equally as diverse in how it was accomplished. Some of the LTM's Committees on Ministry engaged in some focused assessments of an area each month. No one method emerged as a best practice.

Recommendation 5: Stay at the table.

One of the gems of this research, for me, was a story about a minister in an LTM who overstayed pastoral effectiveness in the congregation, but stayed until a conflict was fully addressed, and then some time afterwards. The minister who followed shared that the experience helped affirm the ability of this congregation to see themselves as the kind of people who work things out, rather than get rid of a minister. The new minister credited the former minister and the congregational leaders with their willingness to remain in respectful and authentic conversation at the table even as they came to the mutual realization that the ministry should come to an end. In Senge's theory, the congregational leaders' commitment to the well-being of the system engendered accountability to best outcomes. In UU theology, that best outcome required a respect for the office of minister and a keeping of covenant of right relationship. In this story, as one LTM came to a close, the pathway forward into another remained open.

To help a congregation stay at the table, consider Carl Dudley's three step process when things get messy: (1) unpack the mess into a set of defined, workable problems. Look for tools that help you understand these problems. (2) You need workable solutions - bridges between what is happening and what ought to happen. To know where to go, you need to understand both the undesired past and the hoped for future. (3) When stuck, recycle: count on things going wrong, mistakes happening, and people becoming upset.⁷⁶ Such mistakes are opportunities for increased communication, the improvement of our capacities to solve problems, and the clarification of our management gifts.

This recommendation rests at the very heart of effective LTMs. It is also one of the more difficult tasks. If it has not been part of the culture of a congregation, the necessary shift will benefit from the establishment of a Committee on Ministry (CoM), a covenant of Right Relationship, conflict resolution policies, and trainings on non-violent communication. Each of these helps build capacity toward that moment when everyone is called to remain at the table. Having systems and skills already in place and well-practiced in small ways, help maximize the possibility that congregational leaders and minister alike will be kind, thoughtful, and committed to work together in service to the health of the congregation and faith.

⁷⁶ Nancy T. Ammerman et al, *Studying Congregations: A New Handbook* (Nashville, TN: Abingdon Press, 1998), 126.

Recommendation 6: Learn to be responsive rather than reactive.

When bumps arise, get help early and often and insist upon the health of the LTM remaining a goal. If you are a minister and the voices you hear move quickly to suggestions to end your ministry, find other voices. If you are a congregational leader and are hitting a bump, talk with your minister about outside resources that would support the shared leadership, clergy and lay leaders, in moving through the challenge. Resist what may seem like an easy answer if it sounds like this “maybe it’s time to have a new minister/ministry.”

It is through this insistence that UU faith institutions, the UUA and the UUMA, will adapt existing resources and create others in support of this goal. Many of the interviewees noted pivotal moments when things could have moved forward or stalled. Each time it was the impulse and ability to be responsive rather than reacting quickly that allowed the shared ministry to continue. If that impulse is not natural, ministers seeking to achieve LTMs need to prioritize its development and also help nurture it in their lay leadership. This is also a key trait to seek in board leadership and other staff.

Ministers should be clear in their relationships with mentors and colleagues that LTM is their goal and, if possible, connect with colleagues seeking the same. This can help further hone responsiveness over reactivity as when bumps arise, they can be more assured of support with the goal of continued ministry. Perhaps, congregational leaders can also engage their counterparts in regional gatherings

and request meeting time, space and resources to aid their LTMs. Hearing stories from one another about successes and failures on the journey may offer important insights. Networking with others who are also in LTMs may lead to shared workshops, trainings, and consultations that would support ongoing LTMs.

Recommendation 7: To ministers in search: get to know the congregation before you go.

Ministers seeking to live their call by leading a LTM, have homework in the settlement process. Design your search with the characteristics of successful LTMs in mind. If you are determined to serve in an LTM where the congregational culture is known to support LTMs, you can easily limit your search by looking at the congregational record.⁷⁷ Don't rule out congregations who haven't yet enjoyed the benefits of LTMs. In the larger context of realizing our full faith potential, UUism actually needs ministers to consider those congregations. Ask deep questions about their aspirations and patterns. While some congregations may be predisposed to resisting LTMs, others are aching for the opportunity. Questions should include: Do they utilize a Committee on Ministry? Do they accept anonymous feedback? Are past lay leaders still active? How do they engage with conflict? Do they have a sabbatical policy and has it been used? How are they known in the community? Do they have a vision? Under what circumstances did the last settled minister leave? It may be a congregation with a record of short-

⁷⁷ Congregational records are part of the UUA's online transitions system. Ministers in search may log in and find detailed information about the congregation, including the history of settled ministers.

term ministries has been a stepping stone church but would love a LTM. Be sure to interview the interim and former ministers as well. Ask the same questions. Do the answers match? A caution here is a reminder that the skill set and experience of those serving interim ministries varies widely. Some are accredited and have decades of experience in interim ministry. Some are newly ordained, about to be ordained or leaving difficult ministries.

Next, you'll want to be sure to have your own support systems in place. All of the LTM interviewees were engaged with spiritual practices and systems of support. All engaged with ongoing professional development. Nearly all were experienced in dealing with conflict and had high levels of capacity for depersonalizing criticism and welcoming feedback. Each engaged in high level planning with their boards and congregation, albeit with different styles. None limited their time to preaching, teaching and pastoral counseling. Just as you assess the congregation, it will be important to assess your own preparedness to meet the unique needs of longevity in the parish. Consider these four lessons from Adam Kahane in Peter Senge's *The Dance of Change*:

- Lesson 1 - I was much more effective when I gave up the stance of knowing and arrogance and replaced it with one of wonder and reverence.
- Lesson 2 - People seemed much more effective when they gave up the illusion of being in control, and instead tried to work things through with others.
- Lesson 3 - Strategy work is not only work of the mind – but work of the heart and spirit as well.

- Lesson 4 - We must give up the assumption that we are powerless, that we can only react to the world, and we are passive in its face.⁷⁸

Ministers of LTMs have learned their way into these lessons. Some more easily than others and some are ongoing work of head and heart. The work of the minister in LTMs changes as each chapter of ministry unfolds. So too, the minister themselves.

Recommendation 8: To congregations in search: get to know the minister before you call them.

Congregations seeking an LTM, have homework too. Look for signals that the candidate might be a climber. Is this a stepping stone on the way to a larger parish or specific ministry? Does this candidate have strengths in the areas critical to LTMs? How have they dealt with conflict? How do they deal with feedback? Are they interested in strategic planning and have they led through visioning processes? How do they manage boundaries? Do they seem agile enough to transform as the congregation transforms in the coming years? And just as the minister seeking an LTM benefits from self-assessment, congregations in search should examine their own history and current readiness for LTMs. Is the congregation willing to invest in a newer minister knowing that minister will necessarily be honing some of their skills in the early years of their ministry? Is the

⁷⁸ Senge and Roth, *A Fifth Discipline Resource*, 16.

congregation committed to a sabbatical practice? How is conflict managed in the congregation?

Recommendation 9: To the interim minister – do no harm.

This is the first of two final recommendations to the ministers who won't (or shouldn't) be around when the new minister begins. To the interim minister: the gifts an interim minister gives to the congregation is to hold their health central, to affirm their achievements and make room for the next LTM. Given the complex landscape of UUA interim ministries, there are no assurances that a congregation will receive the considerable gifts that come from seasoned, accredited interim ministers. It is not uncommon for interim ministers to be newly ordained or recently terminated. My strong recommendation is to do no harm. Newer ministers may have heard that interim ministers are called to shake things up, change things so the next minister won't take the heat for doing so, use the word "God" a lot in Humanist congregations and refrain from it entirely in theist congregations. While the present research on LTMs does not presume to offer best practices in all interim ministry, it does offer the strong recommendation that interim periods following successful LTMs support the transition more than direct it. Successful LTMs are those congregations clear on who they are and where they are going. It is a disservice to interrupt that course. For those congregations who might have been churning through ministers and are seeking support to attract an LTM, help them engage this literature to assess what changes they might make in order to

become an LTM.⁷⁹ Simply sitting with the Transition Team and Search Committee and discussing these recommendations could lead to important insights.

Recommendation 10: To the out-going minister - let go.

To the out-going minister: let go. The final gift a departing minister gives to the congregation is this sacred gift of truly leaving. Make this your final benediction. If the departing minister has served well, their final act of good service is letting that be enough. Letting go is an act of ministry. In this study, participation from the former minister ranged from none at all to participation in some memorial services and occasional preaching. In the case where the former LTM was made Emeritus the relationship benefitted from clarity between the newly settled minister and the former minister. As is the case with any outgoing minister, the incoming minister needs time to establish their own relationships. They also need to be able to claim the authority that comes with the office of minister. For LTMs following other LTMs the differences in experience with the congregation, and perhaps with ministry itself, will be quite large. A natural impulse of many congregants will be to compare the ministers and to expect the prior minister to perform rites of passage. Because of the longevity of prior service there may be expectations that the former minister will officiate at a daughter's wedding or the celebration of a partner's life. These instances will already be difficult but they are far more difficult, and work against

⁷⁹ It has not been uncommon for there to be a shortage of interim ministers. At times interim positions are filled by those without calls to their desired ministry. Not all interim ministers are trained and skilled at interim ministry.

the establishment of another LTM, if the former minister does not gift the congregation with the establishment of a firm boundary. Before these instances arise, the ministers should agree on how these situations will be addressed. Ideally, the former minister will take the lead entirely from the newly settled minister. A great disservice is done when the former minister assigns blame to the newly settled minister by saying “I would officiate if I could, but the new minister won’t let me.” Even a focus on guidelines or best practices places the newly settled minister in a place of appearing like they could choose to do what the congregant wishes, if they wanted. Once again, holding the health of the congregation higher than personal need or desire is a gift to LTMs.

Caution

While the interviewees, supporting research and analysis highlight the benefits of LTMs, there are some cautions to note. This study quite purposefully selected LTMs where previous LTMs had also existed. The thesis was that in those congregations, where multiple LTMs had occurred, the LTMs were successful in part because of a shared valuing of the health of the congregation as the central focus, rather than solely because of some attribute(s) of the minister. The common narrative about LTMs in UU collegial conversations is that staying too long is a death to the minister who will follow. My focus has not been on those instances but I will briefly address the facts I believe to feed that narrative here.

Certainly, there are instances in which this was true: the minister who re-shingled the roof or painted the entire building; the church who everyone referred

to as Rev. fill-in-the-blank's Church; the church where the minister made up the difference when the budget was low; the minister who designed and installed the windows or laid the pathway to the memorial garden walk brick-by-brick. The stories are well known and the results equally well-known. It was said nobody could follow them and often, this proved to be true. Despite interim ministries, one and sometimes more than one settled minister left after abbreviated service.

The LTM ministers I interviewed do not share a worry about a similar fate once they move on from their LTM. I conclude the risk is minimized because they have contributed, and been a leader, in a culture of shared ministry, shared vision, and congregational identity that is appropriately separate from the identity of the minister. When asked about the negatives the congregation might have experienced because of the longevity of their service, most interviewees did not provide a response. Three interviewees who did respond shared "that someone else might have brought different skills that the congregation would have benefited from." Few offered any negative impact on themselves from having served in an LTM, even while noting the challenges of conflict. In some of the LTMs the conflict took a heavy toll on the ministers but in each case, they deemed moving through that conflict and the ongoing development of the LTM as worth the price.

The shared accountability for the ongoing success of the LTM offers an inoculation of sorts against the problems faced by congregations and ministers following those LTMs which are viewed so difficult to follow. Because the

congregation itself shares accountability, and presumably pride, for the ministry that preceded the LTM minister and will exist long after the next called minister, the church and its ministry are understood as belonging to the congregation, not the minister.

Pointing to the Future

In recent years a study of nearly 200 pastors from 24 different Protestant denominations reflected three quarters of the study pool of congregations that were growing were served by ministers who were in year four or more and two thirds of those in the declining churches were in year one, two or three.⁸⁰ In Unitarian Universalism we do not have access to that data, but tracking it is a worthy goal. For those driven by growth in numbers, this is compelling but I suggest another kind of growth as more compelling. Having admitted my bias of believing LTMs are good for congregations and UUism, and believing I was clear about some of the benefits of long-term ministry, I exit this research looking forward to new conversations with my lay leaders and staff. Each interview either affirmed and/or offered a new lesson that will likely aide in ensuring the continued success of the ministry through and beyond our remaining time together. Like several of the interviewees, I noted a distinct change in relationship somewhere after year five and along with that a shift in our shared leadership. The increased trust was

⁸⁰ McIntosh and Arn, *What Every Pastor Should Know*, 173.

palpable with a sense of greater relaxation in our relationship and at the same time, greater possibility. We were able to begin a visioning effort that continues today, and we directly asked the question of how we might best use our collective power in the community. Our ability to share has heightened and our systems of accountability to covenant now extend into the pews. This is about a different type of growth. It's about growing in faith toward the achievement of a better tomorrow. It's a pathway toward living our faith values to their most powerful potential in our lives and our communities.

I am equally clear that our situation is not unique. LTMs are possible for each of our congregations, should ministers and congregations dare and our institutions support them. Successful LTMs do not happen without intention to good ministry. But when they do, the community created is powerful and a gift for all future ministries in LTM congregations. If willing, there are specific things ministers can do to maximize the chance of serving in and nurturing an LTM. And there are specific things congregations can do as well. Having institutional support, and the encouragement for LTMs would be helpful but requires a commitment to the goal. It is surprising that none has been evident in recent history and leaves me with the question 'why?'

Not only are effective LTMs good for congregations and good for ministers, they are a needed response to ministerial call in service to Unitarian Universalism. LTMs are also a needed response by congregations wishing to live the UU faith in

their lives and communities. Our congregations need ministerial commitment to LTMs and our institutions should dedicate resources to the supporting LTMs. There are lessons to be learned from the existing LTM stories and mentors on the journey are available. The benefits to congregations are substantial, particularly in the areas of stability, trust, resiliency, vision and spiritual maturity. Ministers reported benefits as well, including a deep satisfaction of fulfilling their call. The benefits to the larger communities in which LTMs exist are also evidenced in the development of relationships of trust and accountability and increased likelihood of long-term, shared efforts.

On a personal note, I look forward to the next three years of my ministry with UUCM. Upon departure, I will have served fourteen years. The LTM we have created together will be the longest ministry since 1811, with one other tying the record in 1922.⁸¹ This research has affirmed some of the things we put in place are in line with the recommendations that emerged from these interviews. In particular, the use of a Committee on Ministry, a visioning process, and a commitment to strong boundaries. Together we have moved from a culture of minister as primary decision maker to a collaborative model more empowering of the laity. Work ahead of us, as it pertains to LTMs, includes the continued strengthening of the bond between the social justice work of the minister and that of the congregation, the creation of an effective assessment of the ministry of the

⁸¹ Rev. Edward H. Cotton was called in 1922 and served for fourteen years. The last minister to serve more than fourteen years was Rev. John Bartlett (1811-1849).

church, and continued attention to leadership development. And while here on sabbatical I am taking to heart the advice of so many of my interviewees to reinvent myself as the minister UUCM needs in this next chapter of our shared journey.

Appendix A: Clergy Interviewees

The following participants participated in a project in which many ways they were co-researchers. We enjoyed lengthy conversations with the questions used in Appendix B served as a guiding tool. The interviewees were selected through consultation with the UUA Department of Ministry, my own knowledge, self-selection through an invitation in the UUMA collegial Facebook group, and in some cases referral from within the group of interviewees themselves. The intent was to learn from ministers who were serving in LTMs that followed other LTMs. The underlying belief was that something(s) existed in the culture of the congregation that attracted and sustained LTMs. The interviews were done in two rounds. The first (noted with an *) were done in the summer of 2015 as part of an independent research and the second in the fall of 2016 and early winter of 2017. Those in the first round were provided an opportunity to address questions 30-43 via email as they were not included in the first round of questions. Names are used here with their permission.

Rev. Elizabeth “Beth” Banks, Unitarian Universalist Church of Davis, Davis, CA
(serving in year sixteen following a twelve-year ministry).

*Rev. Lee Blumel, The North Parish of North Andover, North Andover, MA
(serving in year sixteen following a thirty-two year ministry).

Rev. Eva S. Cameron, Cedar Valley Unitarian Universalists, Cedar Falls, IA
(serving in year thirteen following a nine-year ministry).

*Rev. Catherine Cullen, First Parish Church, Unitarian Universalist, Duxbury, MA
(serving in year twelve following a ministry of twenty-two years).

*Rev. Nathan Deetering, First Parish in Sherborn, UU Area Church, Sherborn,
MA (serving in year thirteen following a ten-year ministry).

Rev. Dr. Anita Farber-Robertson, Accredited Interim Minister (interviewed
regarding her LTM at UU Church of Greater Lynn, Swampscott, MA. She
served eight years following a twenty-three year ministry).

Rev. Peter A. Friedrichs, Unitarian Universalist Church of Delaware County,
Media, PA (serving in year eleven following a ministry of twelve years).

*Rev. Tom Goldsmith, First Unitarian Church of Salt Lake City, Salt Lake City, UT
(serving in year twenty-nine following an eight-year ministry that would have
likely continued but the minister retired).

*Rev. Mark Harris, First Parish of Watertown, Watertown, MA (serving in year
twenty following a thirteen year ministry⁸²).

Rev. Beth Johnson, Palomar Unitarian Universalist Fellowship, Vista, CA
(serving in year twelve following an eleven year ministry).

⁸²Rev. Harris was preceded by a four-year ministry of his wife, then shared the ministry with her for two years as part of his tenure.

*Rev. Drew Kennedy, First Unitarian Society of Milwaukee, Milwaukee, WI

(Retired June, 2014 after twenty-eight years following a twenty-five year ministry⁸³ which followed a twenty year ministry).

*Rev. Alison Miller, Morristown Unitarian Fellowship, Morristown, NJ (serving in year ten following a twenty-three-year ministry).

Rev. Mary Katherine Morn, Director of Stewardship and Development, Special Advisor to the UUA President (interviewed regarding her LTM at the UU Congregation of Fairfax (Oakton, VA), She served nine years following an eleven-year ministry).

Rev. Dr. Fred Muir, UU Church of Annapolis, Annapolis, MD (serving in year thirty-three year following a nineteen year ministry).

Rev. Shawn Newton, 1st Unitarian Congregation of Toronto, Toronto, CA (serving in year ten following a sixteen-year ministry).

Rev. Amanda Poppei, Washington Ethical Society, Washington, DC (serving in year nine following a thirty-four year ministry).

Rev. Edmund Heyward Robinson, Unitarian Universalist Church of Chatham, Chatham, MA (serving in year nine following an eight-year ministry).

⁸³There was a 2.5 year ministry in between the two LTMs which ended prematurely due to illness.

*Rev. Peter Tufts Richardson, First Parish UU Church of Kennebunk, ME
(retired. Served in Kennebunk for sixteen years and Andover, MA for ten).

Rev. Kimi Riegel, Northwest Unitarian Universalist Church, Southfield, MI
(serving in year fifteen following an eight-year ministry).

Rev. Susan Ritchie, North Unitarian Universalist Congregation, Lewis Center, OH
(serving in year twenty following a ten--year ministry).

*Rev. Sarah Stewart, First Church of Worcester, Worcester, MA (2014-current,
following a long-term ministry of twenty-seven years, prior to that Rev.
Stewart served Starr King UU Fellowship in Plymouth, NH for eleven years
following a fifteen-year pastorate).

Rev. Jim Vanderweele, Community Church Unitarian Universalist, New Orleans,
LA (serving in year fifteen following an eight-year ministry).

*Rev. Dr. Thomas Wintle, First Parish Church, Weston, MA (serving in year
twenty following another twenty-year pastorate which followed a thirty-one
year pastorate. He also served in Lancaster, MA for twenty years).

Appendix B: Interview Questions for Parish Ministers

1. Tell me a bit about your parish. How many adult members? Children and youth? Staff make-up (i.e. fulltime, part-time, etc.).
2. How many years have you served?
3. How many years of interim ministry preceded you? Was it the same interim minister or more than one?
4. How many years did the former settled minister stay?
5. Was this your first settlement?
6. What has the relationship with the outgoing minister been?
 - a. With you?
 - b. With the congregation?
 - c. Was the minister made Emeritus?
7. What challenges did you encounter that you would attribute to the longevity of the minister's service?
8. What benefits did you encounter that you would attribute to the longevity of the minister's service?
9. At what point did you stop being "the new minister?"
10. What indicators let you know?
11. How would you describe the different periods of your ministry with this congregation?

12. How would you describe the culture of the congregation, of the board of leaders, of the relationship of each with the minister?
13. Have you experienced a change in any of these cultures during your ministry?
14. Do you utilize a Committee on Ministry model?
 - a. If so, what is their role and how have they operated during your ministry?
 - b. If so, were they also in place during the prior ministry?
15. Do you participate in leadership recruitment and development?
16. Are there requirements for candidates for board and other leadership positions?
17. Are there term limits?
18. How are their spirits filled?
19. What ways would you describe the model of governance the congregation utilizes (i.e. Policy-based, visionary, detail-oriented, advisory to the minister)?
20. Do leaders remain engaged in the congregation after they have served?
21. Does your congregation have pastoral care associates or another level of pastoral care support other than the minister?
22. Have you participated in ongoing professional development? With and without lay leaders?
23. Have you taken sabbaticals?

- a. Length?
 - b. Conditions?
24. Do you participate in an annual evaluation? How is it done?
25. Does the congregation and/or leadership participate in an annual evaluation of the overall ministry?
26. How is conflict managed?
- a. Conflict with the minister?
 - b. Conflict with other staff?
 - c. With other leaders?
 - d. Between members of the congregation?
27. How do you manage boundaries with your congregants (i.e. friends in the congregation)?
28. What keeps you grounded?
- a. Spiritual practices?
 - b. Collegial groups?
 - c. Mentors?
 - d. Mentoring?
29. Is the congregation a teaching congregation?
30. What is the relationship of this congregation:
- a. In the community?
 - b. With other houses of worship?
 - c. With the UUA?

31. Did you intend to stay in this ministry for this long?
32. What made it easy to stay for this long?
33. What made it difficult?
34. What do you see as positives for you having been in this ministry this long?
35. What do you see as negatives for you having been in this ministry this long?
36. What do you see as positives for your congregation having been in this ministry this long?
37. What do you see as negatives for your congregation having been in this ministry this long?
38. Are there things you learned after year #5 in your ministry that helped your continued ministry in significant ways?
39. Are there ways your congregation changed in relationship with you after year #5 that helped your continued ministry in significant ways?
40. What advice do you have for ministers or seminarians considering long-term ministries?
41. What advice do you have for congregations seeking ministers to serve long-term?
42. What advice do you have for the next minister serving your congregation?
 - a. An interim minister if one or more is used

b. The next called minister

43. What advice do you have for your congregation after you part?

Appendix C: Advice from the Parish Minister Interviewees

The following are quotes from the interview pool in response to two questions. #40: “What advice do you have for ministers or seminarians considering long-term ministries?” And #41: “What advice do you have for congregations seeking ministers to serve long-term?” In some very minor instances the advice has been edited to protect the identity of the ministry.

Advice to Ministers and Seminarians Seeking LTMs

- Build trust and ensure that leadership is fluid and changing and that the same people aren't always in it. Watch for those moments when something might really shake things up and create something new. Seize those moments when something new is emerging and help feed it.
- Be a bit less patient and a bit bolder. Seize new opportunities and new ways of being.
- Don't take yourself too seriously.
- Don't do ministry to make you happy. Do ministry because ministry is mission work and you choose to do mission work. Do other things to make you happy.
- Don't be afraid to break the rules. We get so rule-bound by contracts and by-laws so small crisis turns into large things. Our ministry, and particularly LTM, is about human relationship. Few things are so hard fast as they can't be negotiated. We must stay in relationship and negotiate

the rules based on the fact that we want to stay in relationship and we value longevity. So, negotiate. Negotiation is about keeping ourselves together. It's about relational ethics.

- Don't listen to the voices against LTMs. We're in a transient and historic moment with a bias against LTMs and there will be other attitudes. The ministry you claim is one available in our association. People who feel they have to leave or want to leave are claiming a kind of ministry that doesn't have DNA in our movement so there's an abrasion from the start. So, claim LTMs in UUism and not just in yourself.
- Have a Committee on Ministry. Consider being a Good Offices person⁸⁴ to expose yourself to the variety of situations that break up ministries.
- Consider LTMs like hoping for a long-term life. It's not something you are guaranteed but you eat right, exercise, etc. hoping for it. There are so many factors you have no control over but you can try to exercise some control by gaining skills. For example, skills in conflict management. I learned things about myself through that.
- Know yourself. And know how to get some distance from yourself.
- Develop a mindfulness practice on how you interact with other people and study how they're interacting with you.

⁸⁴Good Offices is a program of the UU Ministers Association (UUMA) which provides support, advocacy, and mediation for its minister members.

- Read Friedman.⁸⁵
- Do your best to understand yourself as part of the system. Antenna goes up --- being non-anxious person Beating your anxiety as best you can – it's your gig. If they're asking you to fill out a time sheet, you don't have trust – go into search. Trust is the currency of ministry.
- It is intangible but a critical element – it's not about geography or size – it's about fit. You need to be able to trust your gut. It is possible and don't compromise on it if you're looking for this and you can find it.
- Take your sabbaticals, do continuing education that feeds you,
- Think it is true that there is work you can do only if you stay that long. It removes an element of stress, personally. It's really different to be in a ministry with an expectation that I'll be here long. Multi-year goals and progress over time. You may have some really difficult years, be unhappy and expect to leave. But you can sustain yourself through those years and your perspective will shift.
- Don't make it your plan. And be open to changing. You may think you're on your way out and that's what's good for the congregation and then after sabbatical it shifts.
- Be okay and transparent about reinventing yourself. Learn together what's needed next and then adapt to become the minister that's needed.

⁸⁵ Edwin H. Friedman, *Generation to Generation: Family Process in Church and Synagogue*, (New York: The Guilford Press, 1985).

- Remember that it takes time to go anywhere. If the congregation isn't moving as fast as you need personally, find the things you can do to help you get places. It doesn't all have to happen together.
- Don't rush it. If you're going to consider an LTM you need to recognize that culture shift does not happen accordingly to a three-to-five year plan. It especially doesn't happen around things like moving to multiculturalism. We're so enamored of three-to-five year plans and cultural shifts takes longer. Just because you're successful at it in the first years, doesn't mean it took and that's a vital point. If you leave thinking you helped get them there, you will be disappointed. And so will they.
- Only go to a congregation if you love them and their problems and you love them now (this minister credited UU ministerial colleague Patrick O'Neill with this point). Be really clear you're attracted to that congregation now. My experience with all the search coms [[committees] is they're looking at it too.
- If you are not seeking an LTM, be honest about it up front. Congregations in search want to know you will bury them when it's time. They are looking at you to see if you are worthy of burying them. To be in that search process and already be planning to leave within five years breaks the covenant in their heart.
- Find some spiritual practice that will allow you to look for the good in people, the best in people, because there will be points when they will not

be their best and you want to have a store to call upon during those times.

Choose your way to do this.

- Know as much about the congregation as you can. How the other ministries went. Read in between the lines to know as much as possible what you're getting in to.
- Don't give up when the dysfunction happens if it's not disproportionately high.
- Don't let the mean people get you down if they're only a few of them.
- Remember that it's not all about you. Work with that and from a place of differentiation. Know that the congregation will change and you will change with it. You will guide the change and be guided by the change.
- Pay attention to the basics, which as I have come to distill them, include above all else integrity and love. Cleave to integrity and love.

Advice to Congregations Seeking LTMs

- Root for the success of the minister.
- Be upfront that's what you want and why. The search committee should be clear.
- Pay them adequately and support them with professional expenses and sabbaticals.
- Cherish them and let them know they are appreciated.

- Be yourselves. Don't try to hide your warts. Be honest and follow through with trusting your minister.
- Don't second guess your minister. Treat them like a grown up.
- Have a good Committee on Ministry or something like that.
- Treat your minister as a professional, if they were the Superintendent of your school district would you speak to them that way? What kind of perks would you want the Superintendent to have? What level of respect?
- Be open to younger ministers. If you want a 20-year ministry you should be looking at younger ministers. You have to be accepting there will be areas less polished at first but there will be growth too.
- See that the minister has their own goals and support them in those goals.
- Practice generosity of spirit.
- Be willing to keep growing. Know that you will learn together and change together. It keeps both minister and congregation connected, engaged, and loving one another.
- Congregations need to reinvent themselves too and be committed to being life-long learners. If one side of the relationship stops wanting to grow, the relationship is doomed.
- Find ways to harmonize. Be looking for ways to gain a collective vision of where you are going.

- Stay in communication. There needs to be open, honest communication between the board and minister. A trusting, honest, transparent level of communication is paramount.
- Sit with what a ministerial candidate thinks LTM means. Are they looking for personal stability? Are they geographically bound to the area? Are they afraid of the cost of moving? Explore their reasons for wanting an LTM.
- Ask interview questions about how they resolve conflicts, deal with disappointments, and bring the best out in others.
- Examine their past ministries looking for patterns.
- Know yourself as a congregation. Don't fool yourself about who you are and want to be. There is deep work to do to further your mission and vision. Know that you and your minister are growing together.
- Know that your minister doesn't know everything and neither do you.
- Be co-creators. Know that you'll all change in the process.
- Look for ministers who demonstrate long term qualities of integrity and love.

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Vita



