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Introduction

At the invitation of the Prudential Committee and the Minister, and in accordance with the Memorandum of Understanding dated September 25th, 2018, Rev. David Pyle of the UUA Congregational Life Staff Group, New England Region submits this Congregational Staffing Assessment. The goal of the project is to review the current staffing structure for effectiveness, sustainability and appropriateness to the mission of the First Unitarian Church of Providence. The MOU outlines several phases and this report addresses the current status of staffing in relation to congregations of similar size and initial indications of the effectiveness of the current staffing structure.



Assessment

The First Unitarian Church of Providence is a primarily healthy congregation that continues to experience significant growth in membership as well as in programming. In beginning this assessment process, I did not encounter any particularly problematic areas of the congregation or its history as relates to congregational staffing. The congregation's relationship to professional staff seems healthy and positive, without the level of challenge to professional staff authority that exists in many other Unitarian Universalist congregations.

The professional staff team of First Unitarian Church of Providence also appears to be a healthy staff team, both in individual skill and in team dynamics. One of the most surprising aspects of this assessment process has been that the staff team did not use the opportunity of the interviews and conversations that were conducted to air any significant inter-staff disagreements or frustrations with congregational lay-leadership or membership. While challenges faced by the staff were expressed, such challenges were framed in systemic and non-personal ways. More importantly, it became clear to me that the First Unitarian Church of



Providence Staff Team is exactly that... a team. The congregation should cherish the gift to the congregation and its ministries that this staff team represents. My naming this is a first in the over 20 staffing assessments I have conducted in the last four years.

There are three primary issues that I have identified in this assessment that I feel are most important for the future development of the congregation and its staffing design. These three are:

- The transition of the congregational systems from a Program size congregation with a Pastoral style staffing system to a Large church size congregation with a Professional style staffing system.
- Pledge based donations that seem significantly affected by the existence of several large endowments.
- A level of demand for ministerial services that create a reactive rather than a proactive environment for ministry.



Church Size Transition

Whenever a congregation requests support in assessing their professional staffing, there is invariably a specific factor or factors that are placing pressure on the congregational staffing system. Sometimes that factor is a financial constraint that is requiring a reduction in staffing. At other times it is a series of staff departures that lead to new opportunities in how the congregational staff can function together. And occasionally a change in a congregation's mission may lead to a need to re-evaluate the congregation's priorities for staffing.

None of these common patterns of a need for an assessment of congregational staffing appear to be at play in this case. The motivation of the congregational leadership in requesting this assessment appears to have been that each of the three most recent ministers have named to the congregation that the congregation was "understaffed". What exactly this meant beyond the assessment by these ministers that the needs of the congregation were greater than could be engaged in a healthy way by the current staff was not explored, and the search for a new clergy leader for the congregation prevented the leadership from exploring this at the time.



The first step of this assessment process was to try to determine what are the motivating factors that bring forth the need for an assessment of congregational staffing at this time.

In my interviews with congregational staff members, there were three repeating themes:

1. Growing expectations of the congregation have led to an increased pressure for time and energy by congregational staff to accomplish the necessary tasks for their roles.
2. Patterns and systems that have worked for many years for the congregational staff are at or beyond the edges of their capacity.
3. Managing congregational volunteers and congregational member inquiries and requests in areas of the church's mission that relate to their staff area is a responsibility that is taking up an increasing amount of staff time and energy.



The first and primary aspect of this congregational assessment is that the primary factor placing pressure on the congregational staffing system for the First Unitarian Church of Providence is that the congregation is currently going through a size transition to what Susan Beaumont refers to in her book Inside the Large Church as “The multi-cell church”, while not having completed well an earlier transition in size as relates to staffing. Any adaptation of the congregational staffing system must begin with an intentional effort to shift the patterns of the congregation's staff in relationship to each other, and to the congregational membership.

Church size is about more than members. It is about the amount of space, energy, and ability for people to live their faith within a congregational system. As a congregation grows, the patterns and practices of the various leadership systems within a congregation must shift how they function to be able to best provide space and energy for that congregational development. When a congregation grows in membership, attendance, or program but does not make intentional shifts in how the leadership systems of the congregation function, the limitations of the previous system will act as a governor on congregational growth, and the congregation will almost invariably shrink in membership or in program to remain within the limits of that non-adapted leadership system.



Among the five different systems of congregational leadership that Susan Beaumont identifies in Inside the Large Church is “Staff Team Design and Function”. A congregational staff designed for a congregation of 150 regular attendees on a Sunday needs to function very differently than a congregation with an average attendance between 250-300 regular attendees each Sunday. When a congregational staffing system is not in-tune with the congregation’s number of regular attendees, then each congregational staff member “stretches” within the scope of their designed role to try and meet the increased need within the current leadership system. A congregational staff can function this way for a time and can even support growth in both membership and programming, but it is doing so by overutilizing its current staff in ways that, over time, often lead to staff burnout, departures, and transition. When such burnout and transition occurs, it then becomes a limiting factor on congregational growth, most often resulting in the congregation losing what energy, growth, and momentum that the congregation had gained.



This is the core of my assessment of the current staffing system at First Unitarian Church of Providence. The patterns of the current staffing system are designed for a smaller congregation than currently exists. At present, the current church staffing system appears to be what would be natural for a “Pastoral” model congregation, with an average of 150-200 Sunday morning attendees, where the senior clergy leader plays a direct and central role in managing and directing the congregational staff towards mission. Where staff leadership is exercised in concert with lay-leadership as parallel systems in the areas of staff roles and responsibilities. And where the majority of staff work time occurs as a single “team” amongst the staff, with the senior clergy leader as the “team leader”.

As the congregation has grown and the need for greater staff capacity has become apparent, the strategy for managing this has been that part-time professional staff have been added to share out responsibilities and add capacity to the staff team, while not significantly adapting the core design of how the staff functions together or with the congregational members, volunteers, or leadership.

During my interviews with staff it became apparent to me that both program and administrative staff are “at capacity” within the current staff team design, and that adding additional staff positions (with one



notable exception) would simply replicate the current pattern without making the necessary adaptation to a different style of staff team design. It was also clear that adding additional staff positions (with one exception) would exacerbate the problem of staff capacity, as the system is currently beyond its capacity for effective supervision and staff team performance management.

The saving grace of this staff team now is that the team is high functioning together, and not currently engaged in any significant conflict or personality disagreements with one another. Were such to occur, I do not believe the current staff team design has the capacity to manage such conflicts or personality disagreements within its current design.

There are three primary areas of adaptation that I believe the staff team needs to make to adapt to the current church size, and the likelihood that the current pattern of church membership and participation growth will continue. The first two adaptations do not involve additional FTE's (Full Time Equivalencies, or additional staff positions or time). The third adaptation does involve a modest increase in FTE's phased over the next 2-3 years.

The first of these transitions is to lead towards a major cultural change in the relationship between church professional staff, particularly the primary program and administrative staff, and congregational membership and volunteers. The core of this transition is create a change in congregational culture where the church's professional staff members are charged with the success of the aspect of the congregation's administration, programming, and mission, that relates to their job or ministry, and that church membership and volunteers support the staff in making that aspect of the congregation's programming and mission a success.

Many Unitarian Universalist congregations operate with a cultural assumption that the members of the congregation are the ones primarily responsible for the success of the congregation's programs and ministries, and that staff operate in a supporting role to the membership. This is a wonderful cultural conception for many congregations, but as a congregation grows into the large-mid size and the large congregation sizes, it becomes more and more difficult to maintain. Staff move from supporting roles to being directly responsible and accountable for the





mission, programs, and ministries of the congregation, and the membership move into the role of supporting the staff.

This shift is one of the most fundamental changes a congregation experiences when it moves into becoming a “Large” church, and admittedly First Unitarian Church of Providence is just crossing the threshold of becoming a large congregation. And as with any cultural change, it usually takes a congregation several years to adapt to the new relationship between membership and congregational staff. But making the change structurally in the design of congregational staff positions and expectations is a fundamental first step in becoming a Large congregation.

An example of this would be a transition in the responsibilities of the congregation’s membership coordinator away from working with an supporting an existing lay membership committee or structure, and towards recruiting, equipping, training and directing a congregational membership program that involves volunteers as elements of that program.



One of the signs that a congregation may be growing to the point where it is ready for this shift is when a congregation begins to have difficulty maintaining lay-leadership structures within the program areas of the church and begins to rely on professional staff leadership by default. It is my assessment that this pattern has been at play within the congregational system at First Unitarian Church of Providence for some time, having manifested within Religious Education over the time of the recent interim ministry, and that this pattern is now occurring in the congregation’s membership ministries.

In order for the congregation to formally make this shift, all of the congregation’s senior Program Staff positions and senior Administrative Staff positions should be re-designed to include responsibility for developing lay-volunteerism in their areas of responsibility, to formally grant the positions decision making authority within their assigned areas, within the vision for the staff team set by the Senior Clergy Leader.

This cultural transition will take significant executive and staff supervision leadership that will have to be engaged by the Prudential Committee and the Senior Clergy Leader. As with the rest of the congregation’s staff, the Senior Clergy Leader is already at or beyond their current capacity and adding the expectation to lead through a



major cultural change in the Staff Team Design and Function leadership system would cause significant impacts upon other areas of ministerial functioning in the congregation. Add to this that Staff Team Design and Functioning is only one of five leadership systems in the congregation that will need to undergo significant adaptation, and will require the engaged focus of the Prudential Committee and the Senior Clergy Leader to successfully make the transition to a Large Church paradigm, it then follows that there is a need to add additional capacity over the next several years to the congregation's professional ministries.

To be as clear as possible, if such an adaptation to a Large Church system is to be possible, it will take giving the Senior Clergy Leader the space to lead through that change. Gaining that space will require additional ministerial capacity.



When a clergy leader takes on responsibility for leading a congregation through a major cultural adaptation, the area that most often becomes difficult to manage is pastoral care. Pastoral Care responsibilities are often the most unpredictable and energy intensive aspect of congregational ministry, even when the congregation is not in the midst of a cultural change. When a congregation is in the midst of such a cultural change, however, pastoral care needs intensify due to that change. Adaptation is hard, and congregants often experience emotional dislocations during such a change. And, if the Senior Clergy Leader is leading the congregation through that change, they are often then seen as the “cause” of that emotional dislocation and therefore less effective as the provider of that pastoral care. The congregation will need to develop additional pastoral care resources, both lay and professional, to effectively allow the Senior Clergy Leader to lead through the adaptation of the congregation towards large church dynamics.

Church Systems Development and Adaptation

This assessment has also identified several other systems that the congregational staff rely upon that will need to be adapted or wholesale revised in order to develop into a more “right-sized” church staffing system. Several of these will seem like technical changes, but experience with congregations who have successfully made the changes before tells me that each takes significant adaptation and effort.



Uninterrupted Worktime

The first, and the easiest to address, is that patterns need to be changed to allow and maximize the ability for staff members to have dedicated and reliable uninterrupted work time. While this is a recurrent problem for many congregations, it is most acute in congregations within urban centers or near major academic institutions.

Significant amounts of the work of congregational staff are such that they take focused attention to address effectively. An example of this is that almost all preaching ministers write their sermons at home, or somewhere away from their church offices. Because congregants and community members simply love to “drop in” and visit with or talk with congregational staff at will. And indeed, maintaining an ability for people to feel this kind of access to congregational staff is a priority that many congregations set for their staff.



However, that priority comes at a significant cost to the efficiency of congregational staff at meeting the responsibilities of their duties. What could take two hours of focused work (like vetting curriculum for a religious education class or editing a congregational publication for mailing) will often take 2-3 times that long due to the often-interrupted nature of the work of the congregational staff at First Unitarian Church of Providence. On multiple occasions during this assessment I sat where I could observe the congregation’s staff at their work, and I saw a clear pattern of staff being interrupted from focused work by community members, congregation members, and by each other.

I expect this observation to be somewhat controversial, not just among lay leaders and congregation members, but also among the staff themselves. Because the staff of First Unitarian Church of Providence all seem very gregarious and seem to actively enjoy the interruptions and the engagement with congregational members. I have never entered the building without a staff member being gracious, welcoming, and wishing to enter into significant conversation... even when I was there for an appointment with someone else.

The staff team role descriptions and responsibilities should be re-designed with the intent of ensuring that each staff member has approximately a quarter to a third of their working time designated as uninterrupted time. This can be accomplished in several ways and may be different for each staff member. Two of the recommendations of this



assessment are focused on adaptation of this particular challenge, namely allowing and equipping Program Staff members with the ability to work offsite for approximately a quarter to a third of their working hours, and the addition of Volunteer Staff Receptionists under the direction of the Church Administrative team. The first of these recommendations is to create uninterrupted time by not being present, and the second is to create uninterrupted time by providing a way for routine inquiries to be addressed by volunteer staff, who can also schedule time for inquiries that need to be addressed by administrative professional staff.

Another strategy that has been effective is by managing “open” office hours so that one staff member is available at a time to manage the inevitable drop-ins and other visitations from community and congregation members. This takes some creative scheduling and an agreement among staff to hold this role at specific times. Done well, it can be very effective with only limited awareness by congregation and community members that something significant has changed.

Database Church Management Software System

Another congregational system that is in need of significant adaptation is the congregation’s data management systems. The current database system that is in use within the congregation, Roll Call, is a system that was designed over 20 years ago and has not been significantly developed since. It is managed by the Administrative Assistant, who is the primary staff member who has significant access to and management of the church database.

The Roll Call church database system is on the more limited end of church software systems, and also one of the less user friendly. It is primarily an electronic membership directory and donation tracking software, without many of the additional features that other church management software systems offer. It does not offer any integrated finance systems, building use systems, calendar systems, or check-in systems. While it does have visitation tracking as a capability, the stand-alone nature of the installation that the First Unitarian Church of Providence is using would make that a data entry nightmare, and as such that feature is not used.

The makers of Roll Call do have a version of the software that is cloud based, and at a minimum transitioning from the stand-alone installation





the church has now to the cloud-based system would allow all of the staff to utilize the system without going through the Administrative Assistant. Several staff members have recreated their own spreadsheet-based systems to adapt to not having direct access to the congregation's database system. This not only re-creates effort within the staff but can lead to differences in the data between these systems.

The transition to a new Church Management Software system is always a difficult and painful adaptation for a congregational staff. The transition often means a lot of additional work for the staff member least enthusiastic about the change, that being the staff member most adapted to the current database system; the Administrative Assistant in the case of First Unitarian Church of Providence. Also, the benefits of the change mostly fall to staff members other than the person who ends up doing much of the work.



And yet, a church database that must be mediated through a limited number of staff members becomes a governing factor on staff and lay-leadership efficiency and creates a “point of failure” within the congregational system. A database that can effectively be accessed and adapted by one member of the staff becomes completely ineffective when that one member of the staff is unavailable or incapacitated. Add to this the significant loss of an integrated management of data that can be true of some of the more developed and capable Church Management Software Systems, and the cost of transition to a new software system may well be outweighed by the benefits.

Personnel Policy Manual and a Performance Management System

My review of the Personnel Policy Manual of the First Unitarian Church of Providence is that it meets most of the minimum requirements for a congregation of its current size. One of the areas in it that seemed to need greater development was in the Performance Management System (2.1.1.16). In my interviews with staff as a part of the assessment process, Performance Management (Evaluation) seemed to be engaged in a way that was pro-forma, if it was engaged at all. This is a common occurrence in congregational staffs that are stretching to meet mission needs and goals, and who are not currently experiencing significant conflict or tension amongst the staff team.

Part of the transition of the Staff Team towards a Large Church system should be the implementation of a more formal Performance



Management System, with an integrated connection between Job/Role descriptions and the tools that are used to conduct evaluations. The current system, as it is designed, seems informal about the metrics and standards by which employees are evaluated. This is possible when a church staff is small enough and integrated enough for the Chief of Staff (Senior Clergy Leader) to be intimately aware of the actual daily performance of each staff member. However, as the church program grows and the staff stretches to meet those requirements, the informal or observational style of evaluation tends to become less and less effective.

What most often occurs is that performance management (evaluation) then is primarily engaged in the negative and is often separate from the stated requirements of the position. Because church is a complex working environment, with many possible relationships between a staff member and members of the congregation or community, actual performance evaluation becomes difficult separated from those relationships, unless there is systemic clarity about the metrics by which performance is evaluated.



Two of the recommendations in this assessment are intended to begin addressing the needs of adapting this system; the adoption of and training in the Stepping up to Staff Supervision program, and the Senior Program Staff, Senior Administrative Staff, and Personnel Committee conducting a group read of When Moses Meets Aaron by Susan Beaumont.

When this Assessment is finalized, it will be accompanied by a review of the entire Personnel Policy. However, there is one area that I wish to name in the assessment. I have never seen a congregational Personnel Policy include an entire “job description” for the Senior Clergy Leader as a part of the Personnel Policy. Usually, if this existed at all outside of the Letter of Call, it would be in a separate policy, or in a procedures document.

Just because I have never seen it before does not mean it is “wrong”. It is just very odd. And as I reviewed it, the thought came to me that there might well be some kind of story about what the purpose of including that within the personnel policy. It is unique in my experience, and the Policy includes no other job descriptions besides that of the Minister.



Congregational Administrator

One last note that I am called to make as an aspect of this assessment is to state that the congregation has been very blessed by the effectiveness of its senior administrative staff. Much of the capacity that exists within the staff team to function beyond their current staff team design seems to lie in that the congregation has had a history of extremely effective congregational administrators.

If there is a place where the congregation is ahead of itself in its development, it is in that the current and the previous congregational administrators have held a job portfolio that looks more like that of an Executive Director than that of a more traditional church administrator. I believe that this has occurred because each had the skills to do so, and the congregation took advantage of those skills.

I do wish to say that neither was fully functioning as an Executive Director, and the position is not yet ready to become so. In particular, the responsibility relationship between the congregational administrator and the Prudential Committee is not what would be expected of an Executive Director. Yet the combination of staff supervision, building management, congregational coordination, communications, and senior staff support look more like that of an Executive Director than that of a more traditional Church Administrator, and the congregation should begin planning to transition the position appropriately in the next five years.

Recommendations

The Meta-Recommendation for this Staffing Assessment is one that is difficult to capture in a numbered list. It is to make an intentional effort to redesign the staff team relationships, and the relationships between the staff and congregational volunteers to empower staff members to “lead” in their respective areas of responsibility, and to coordinate congregational members as volunteers to be successful in those areas. This is something that has already begun happening in the congregation, and the recommendation is to make it formal and intentionally engage the cultural changes that will be necessary. This cultural adaptation will take intentional leadership from both the Prudential Committee and the Senior Clergy Leader and making the space for them to lead this culture change is the basis for many of the more granular recommendations of this assessment.





Making this change will require leadership to do some community learning together, and as such I am making several recommendations that I have never made in a staffing assessment before. The basic vision is to make space for leadership to lead an adaptive change, to help the leadership understand and come to agreement on the cultural change that needs to occur, and then to build the systems and supports that will allow the staff to be successful as their role and authority changes within the new cultural paradigm.

Specific Recommendations

- 1. Development of an Assistant Minister for Pastoral Care position within this church year, with responsibility for a Parish Care Program and a Pastoral Associates Program.***

Pastoral Care capacity within the congregation is currently at a level far greater than can be managed solely by a single professional pastoral care provider, even without beginning a planned and intentional effort at congregational culture change. As discussed in the congregational assessment, such times of culture change create a greater need for pastoral care within a congregation. And, any such effort at cultural change will require additional time and attention from the Senior Clergy Leader, making them less available for providing pastoral care.

This recommendation would involve a phased plan to reach a half-time Assistant Minister for Pastoral Care over a 3 year period, beginning at a ¼ time position and reaching a ½ time position by the 3rd year. This position would need to be a minimum of a ½ time position to be viable, even given the number of experienced but near retirement ministers in the general area of the congregation. In fact, it would be best to begin the position at ½ time, if that were in the congregation's capacity.

The position would have three primary responsibilities. The first is direct pastoral care for congregational members outside of church leadership, and for visitors. This would include a close partnership with the Membership Coordinator and Director of Religious Education on addressing the Pastoral Care needs within their respective areas of congregational responsibility. It would also include non-emergent Pastoral Care (ongoing longer term) within the congregation.





The position would also hold responsibility for recruiting, training, and developing a team of lay Pastoral Associates and a Parish Care program (providing meals, rides, cards, etc.) In a ¼ time position, a decision would have to be made to prioritize the development of each of these programs in succession, rather than concurrently. The Pastoral Associates program would require ongoing training and supervision, while a Parish Care program could be run self-sufficiently once it is developed and implemented. Congregational priorities and needs would have to determine the order of development.

- 2. Increase the Membership Coordinator position towards ¾ time Membership Manager position within 2 years, with an increased responsibility for Volunteer coordination and leadership.**



The only staff position that I assess does not currently have the capacity to transition towards the new leadership paradigm of a Staff Directed program from a Lay program with staff support is the congregation's membership programs, even though the pattern of the congregation informally adopting this pattern is also in evidence in the membership programs of the congregation. The current membership coordinator is doing the best that can be done within the limits of the position, but to formally take on the responsibility of coordinating the membership volunteers and directing the membership programs of the congregation as an empowered staff leader will require the position be moved to ¾ time. The final draft of this recommendation will include numbers costing this transition, and how the funding for this expanded position might be developed.

- 3. Transition the congregational data systems towards a unified and purpose designed church software system, that all staff members can access through the internet.**

Whether it is the online version of Roll Call, or a more flexible and adaptable church management software system, the primary need is to loosen the bottleneck of direct access to the database that the congregation is currently experiencing. Staff members should receive training in utilizing whatever system is chosen and should be required to use that system rather than re-create systems of their own. A lay-staff team should assess the current needs of the staff in data management, and



then decide if the online version of Roll Call can meet those needs, or if a different church management software system is necessary. In any transition, however, support should be given to the Administrative Assistant in making that change and understanding the costs of such a change for the Administrative Assistant.

4. *Ensure that all Program Staff have the needed equipment to be able to work offsite for at least ¼ of their scheduled hours.*

While this recommendation is for the primary purpose of creating the opportunity for Program Staff to have uninterrupted work time for at least a quarter to a third of their work time, it is also to facilitate program staff being able to attend to their own professional development. All Program staff should be given church purchased laptops rather than desktop computers. The congregation might consider some subsidy support for a home internet connection. The congregation should also consider purchasing a church staff teleconferencing service, such as Zoom teleconference or Anymeeting to allow for off-site work. This may include outfitting an office or room at the church with a good teleconference camera and projector (which would also help with communicating with UUA Regional Staff). At a minimum, this should apply to the Minister, the Membership Coordinator, and the Director of Religious Education. It could also be applied to the Administration Staff, or the strategy in Recommendation 5 could be applied to gain uninterrupted work time for the Administration Staff.

5. *Develop and create intentional Volunteer Staffing positions that are supervised by and accountable to the Administrative Staff for Receptionist responsibilities.*

As another strategy for creating the ability for staff to gain uninterrupted time, the congregation should develop and recruit a minimum of three volunteer staff positions as Church Receptionists, scheduled during the primary work hours for the congregational administrative staff. These volunteer staff positions should be individually recruited, have a formal volunteer staff position description, and be supervised by the Administrative Staff. Their role should primarily be to receive any and all visitors, answer general inquires, conduct building tours for rentals, perform routine office tasks, and take messages and schedule requests as appropriate. If the congregation moves forward with this





recommendation, we will be available to help the congregation develop good practices and patterns for such positions.

6. *Develop and create intentional Volunteer Staffing positions that are supervised by the Building Manager for building security.*

Similar to the above recommendation, the congregation should develop and recruit 2-3 volunteer staff positions, supervised by the Building Manager, for building security on evenings and weekends. These positions should have formal position descriptions and be individually recruited.

7. *Develop a 2-3 year phased plan for raising salaries to reach the Large I size rating in the UUA Salary Recommendations for all staff positions.*

As the congregation continues to grow, it has recently surpassed the membership numbers that transition a congregation from the Mid-size III range of the UUA Salary Recommendations into the Large I range. Because pledge income generally grows at a slower pace to membership numbers, such a transition often leads to difficulty for a congregation to achieve the mid-range of the UUA Salary recommendations. An intentional effort should be made to celebrate the growth of the congregation, as well as helping the congregation to understand why that growth places increased demands upon the congregation's staff. A public and phased plan for reaching the Salary Recommendation goals can be part of growing the congregation's awareness of the culture change that comes with being a growing and vibrant congregation.



8. *Develop a 5-year phased plan to transition the Church Administrator position into an Executive Director position, to include an increase in staff supervision and governance accountability.*

As the congregation continues to grow, the Senior Clergy Leader will tend to be drawn more into strategic leadership, public witness, worship development, and financial stewardship. In order to facilitate this transition, the congregation should be planning on also growing the Congregational Administrator position more towards an Executive Director position, with increased responsibility for managing congregational staff supervision and serving as the executive for administration and finances within the congregation's governance and leadership systems. While this will, when formalized require a significant increase in compensation for the position, prior to that it will take planning and development of the role. The congregation should begin planning for that transition now, and



developing how other positions in the congregation (such as the Administrative Assistant) might also change.

- 9. Implementation of a Susan Beaumont style Church Staff Performance Management system, with a formal supervision and evaluation system.** Senior Church Staff and long term members of the Personnel Committee should seek to attend the “Stepping up to Staff Supervision” course offered by Susan Beaumont, and integrate the system of congregational staff Performance Management within the congregation. If attending the course is not feasible, then utilizing the book When Moses Meets Aaron and finding a congregation practicing the system who you can learn from would be an alternate plan. The goal is to develop an easy to use and accountable system for staff evaluation and performance enhancement that includes explicit expectations and evaluation criteria for performance.

- 10. The Prudential Committee participate in a “Board Read” during the next calendar year: Inside the Large Church by Susan Beaumont.**

While I have made recommendations for Board development in other assessments, I have never done so in a staffing assessment. I am making this recommendation because I believe it is essential that the congregational leadership gain an understanding of the cultural change that will be necessary to continue the congregation’s growth and development, and to develop a common language that will allow the leadership to discuss and discern together that change.

Because it was written for denominations beyond Unitarian Universalism, the church size and attendance numbers that are used within the text are set a little higher than they tend to manifest within Unitarian Universalist congregations. I believe the congregation is somewhere in the size range between the “Multi-celled” congregation size and the “Professional” congregation size described within the book. But whether I am right about the size dynamics or not, the book will give the leadership of the congregation a common set of language and understanding of the leadership systems that need to adapt for the congregation to continue to grow. It is less important that the book “fits”, and more important that it provides a framework for the conversations about the adaptations in the congregation’s systems and culture.





11. The church program staff and senior church administrative staff, as well as the Personnel Committee participate in a “Staff Read” during the next year: *When Moses Meets Aaron* by Gil Rendle and Susan Beaumont.

In order to formalize and develop the new staffing dynamics, the congregational staff also needs a common set of language and understandings. This recommendation is the corollary to recommendation 10 for the congregational staff. It will help the staff members who need to supervise both junior professional staff as well as volunteer staff develop a common practice of doing so and create a shared set of language and intentions among the senior staff for how the staff should function together. Most importantly, the ideas will lead the staff towards adapting the staff team dynamic towards that needed of a large congregation.

12. A professional and objective assessment of the congregation’s giving capacity towards the increased staffing costs of the recommendations of this assessment.

This Staffing Assessment did not include an assessment of the congregation’s giving capacity. Such an assessment is vital to determining what resources may be available to leading the congregation through the cultural change towards a large congregation. My review of the congregation’s financial data as well as the demographic information I have on Providence seems to indicate that there may be significant giving capacity within the congregation that is not being accessed. A professional stewardship consultant can conduct an assessment to give the congregational leadership a realistic picture of the resources that could be available were this transition to be fully engaged by the congregation.



Implementation

This section is intended to provide guidance on each of the recommendations listed above for the congregational leadership to implement any and or all of the recommendations. Through conversations with the First Unitarian Church of Providence Prudential Committee, it became clear that the leadership intends to move forward with all of the above listed recommendations, with priority given to those recommendations most closely tied to the need to shift the congregational culture around staffing toward staffing positions and towards stewardship. However, I offer the caution that, many of the recommendations that relate more towards changes in how the congregation sees itself, and how congregational leadership and membership relate to staff, are in many ways the most critical to



successfully navigating the size-dynamics changes that are outlined in the Assessment. They may seem less “actionable” because they are about the shifts in congregational culture that I believe are necessary if the congregation is to remain at its current size, regardless of any growth that might occur. As such, I have provided recommendation guidance for all twelve of the recommendations equally, in the hopes that the Prudential Committee and the Senior Clergy Leader will provide leadership in all of the areas, not simply the ones that can be engaged through technical change.

1. *Development of an Assistant Minister for Pastoral Care position within this church year, with responsibility for a Parish Care Program and a Pastoral Associates Program.*

While I believe that the full benefits of this recommendation will only be fully available once the position is at least a 0.5 FTE (Full Time Equivalency), waiting until that is financially viable for the congregation would prevent the Senior Clergy Leader from beginning to provide the leadership needed for the recommended cultural change. It is also clear that there are currently unmet pastoral needs within the congregation and wider community regardless of the need to lead through the cultural change to a large model (Professional Size, in the Susan Beaumont literature) congregation.

Growing a congregation’s pastoral care ministries allows people to feel more cared for and seen within the congregation, which can create a stronger sense of stewardship. As such, a stair-stepped approach to growing an Assistant Minister for Pastoral Care position within the congregation could increase stewardship to support the position.

Providence, Rhode Island is listed in the GEO INDEX listing for Unitarian Universalist Congregations as Geo Index 4.0, with average wages for the community being 103% and 109.9% of the U.S. Average for the cost of wages. It is important to note that this metric does not take into account cost of living, only the average cost of wages to employers in the area, as compared to national averages.

The UUA Compensation Guidelines sets the salary/housing guidance for an Assistant (non-called) minister at 1.0 FTE to be between \$56,150 at the minimum, and \$78,300 at the mid-range. It is rare a congregation would hire a position at above the mid-range, as that would limit the potential for growth in the position. Determination between a hire at the minimum and the mid-range is based on both





experience and a desire to make the position attractive to potential ministers. It is likely that, for a minister with significant experience in Pastoral Care, the congregation would need to hire closer to the mid-range than the minimum, but that would depend upon what experience and skills the congregation might seek.

The recommendation is to “stair-step” towards a 0.5 FTE position within 3 years. One way to reach that is to begin with a position at 0.25 FTE in the first year, increase it to 0.33 FTE in the second year, and reach 0.5 FTE in the third year. Below are the salary and housing numbers at the minimum and midrange for such a stair-stepped plan. Note that these numbers do not include the cost of benefits, employment taxes, or professional expenses. Those should be pro-rated appropriately with the percentage of FTE.



Minimum 0.25 FTE	Minimum 0.33 FTE	Minimum 0.5 FTE
\$14,037.50	\$18, 716.66	\$28, 075.00
Mid-range 0.25 FTE	Mid-range 0.33 FTE	Mid-range 0.5 FTE
\$18, 125.00	\$24,166.00	\$36,250.00

One additional note to make with the guidance on the implementation of this recommendation is the possibility of a partnership with the Bell Street Chapel, which currently has a 0.5 FTE ministerial position. Because of the physical proximity of the two congregations it might be possible for the two congregations together to fund a full-time (1.0 FTE) position to serve both congregations. I am aware of some of the history between the First Unitarian Church of Providence and the Bell Street Chapel, and I would be remiss to not mention the possibility. Both of these ministries are primarily pastoral care focused ministries and combining the positions would not only allow for the creation of a more financially attractive position, but would increase the stability of the position for both congregations. It might also serve to draw the two congregations closer together, thus deepening the covenant that congregations share with one another.



2. Increase the Membership Coordinator position towards $\frac{3}{4}$ time Membership Manager position within 2 years, with an increased responsibility for Volunteer coordination and leadership.

The current Membership Coordinator position is funded at between 12 hours per week (0.3 FTE) and 15 hours (0.375 FTE) per week. If the congregation provided volunteer leadership as the position description describes, this might be adequate to maintain the current membership. It would not be adequate for continued growth for the congregation, and many of the responsibilities of growing the congregation's membership that were envisioned to be held by lay-leadership have instead informally become part of the membership coordinator's position by default.

If the congregation is going to continue to grow, the membership focused staff position will need not only additional time, but authority to coordinate and direct member-volunteers within the congregational system. This would require shifting the position in both the amount of FTE, but also in responsibilities.



I normally build stair-stepped staffing increases on a 3-year time scale, however this recommendation is for 2 years in response to keeping the momentum in the current congregational pattern of growth in membership. Also, the current calculation around salary for this position is an hourly calculation, and I am recommending that this be moved towards a salary-based calculation rather than an hourly one, and that this position become an Exempt position under the Fair Labor Standards Act by the end of the second year.

Because the current Membership Coordinator is relatively new to the position, and because of the shift in the position's description to include more direct responsibility for the congregation's membership ministries, I believe it is justified to calculate the salary range for this position closer to the minimum numbers contained in the UUA Salary Recommendations. However, I will provide both the minimum and mid-range numbers for purposes of comparison.

My recommendation is that the transition in the first year of the stair-stepped transition be two-fold. First, the position be moved from a Membership Coordinator position to that of a Membership Manager. And second, that it be moved from 0.3 FTE to 0.5 FTE. Thus, the calculation for the first year of the transition is below.



Minimum Membership Manager	Mid-range Membership Manager
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0.5 FTE	0.5 FTE
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\$25,550	\$30,050
\$24.50 per hour (based on 1040 hours per year)	\$28.89 per hour (based on 1040 hours per year)

Under the current standards of the Fair Labor Standards Act, applicable at the time of this report, both of these salary ranges would meet the standard of an Exempt employee. The addition of the responsibility to manage lay-leaders and have direct authority over the membership ministries of the congregation would meet the “Executive” and “Administrative” tests for an Exempt employee.



However, the current national political administration is planning an increase of the salary threshold for Exempt employees under the Fair Labor Standards Act in the near future, and neither of the salaries listed above would meet the planned salary threshold of \$35,308 annually. As such, it is unlikely in the first year of implementation the position would qualify as Exempt, and as such I have offered and hourly wage calculation based upon these salary numbers.

The recommendation set a goal of reaching 0.75 FTE in the second year, and I will admit this is an ambitious goal. The recommendation was made in order to acknowledge how a focus on membership ministry at this time in the congregation is essential for the congregation to maintain and continue its current pattern of growth. Below are the recommended salary numbers of the second year of a plan for implementation, to reach the 0.75 FTE goal at the Membership Manager level. Once again I will note that, though both number sets are provided, the circumstance at the First Unitarian Church of Providence would justify a salary recommendation closer to the minimum in the range.

Minimum Membership Manager	Mid-range Membership Manager
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0.75 FTE	0.75 FTE
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\$38,325	\$45,075
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Both the salary range and the projected position description would describe this position to be an Exempt employee position under the Fair Labor Standards Act.

I am aware that this is the most ambitious recommendation that has been made in this report. As stated before, I think it is critical to continued membership growth, however significant gain could be achieved by reaching the first-year numbers, and a longer time-table might need to be projected to reach the recommended numbers in the second year. However, I do believe that there may be an opportunity cost to a decision to lengthen the time-table.

3. *Transition the congregational data systems towards a unified and purpose designed church software system, that all staff members can access through the internet.*



This recommendation, while accepted by the Prudential Committee, is one that has been indicated to have a lower priority. Because of that, I believe the first implementation step should be to explore transitioning to the online version of Roll Call from the current stand-alone version that the congregation uses and dedicating some staff training time to ensuring the whole congregational staff has direct access and can use the system. This would alleviate the primary concern raised in the assessment, of this being a point-fail-source as it is currently functioning in the congregational system.

By The Book Inc, the makers of the Roll Call Church Management system, can assist in a relatively easy transition to the cloud based version of their software, and there are online tutorials that can be used to teach the staff how to use the system. And, as it is essentially the same software as the stand-alone version, the Administrative Assistant already has the knowledge to help the staff to utilize the system. There is even a tutorial on how to use the Roll Call online version as a staff team together.

This will allow the whole staff to see and experience the current system, and to then explore whether it is the right church management software for the congregation. If it meets the diverse needs of the staff, then there would be no need to transition to a different more functional solution. If it does not however, you have learned that for a minimal investment of time and effort, by keeping the same data-structure. You have simply made that more accessible to the staff.



If, however, the staff learns that Roll Call online does not meet their needs, a staff-led process should be put in place to survey other church management software solutions, and choose the one that is right for the congregation. It should be a staff-led process, as the staff will be the primary users of the system, even if one is chosen that allows for limited lay-leadership access and use.

4. *Ensure that all Program Staff have the needed equipment to be able to work offsite for at least ¼ of their scheduled hours.*

This recommendation was also set at a lower priority by the Prudential Committee, and it is one of the easiest to provide guidance on, as it is mostly a technical issue. One of the ideas that you might consider is offering the program staff a subsidy of a set amount towards a laptop computer rather than purchasing a computer for each staff member. The subsidy should be set at the amount for a basic laptop that would meet all the minimal work requirements (approximately \$300-\$400 dollars is usual) that the staff can apply for every 3-4 years in purchasing a computer of their own. In the subsidy model, the staff member personally owns the computer, and the church has provided support for the use of that computer by the staff member for the purposes of the congregation. The staff member maintains ownership of the computer and is responsible for its maintenance and upkeep. It also allows the staff member who wishes to purchase a higher-end machine to apply the amount of the subsidy to that purchase. For most staff, they need a laptop computer that can wirelessly connect to the internet, participate in teleconferences, and run the basic suite of office software.



A second part of this recommendation is to outfit a room at the congregation with the basic necessities for teleconference communication, allowing the staff to participate in some meetings remotely (and also allowing for greater access to communicating with UUA Staff and others). Many congregations are able to make this happen with wall mounted television, a small computer, and a room teleconferencing camera. One of the most common versions (and one used at the UUA Headquarters for smaller rooms) is the Logitech BCC 950, which retails for under \$250, and meets the reasonable needs of most congregations. There is also no need that the computer and television that are used for this purpose be new-purchased equipment, only that they can functionally run the necessary teleconferencing software.



5. ***Develop and create intentional Volunteer Staffing positions that are supervised by and accountable to the Administrative Staff for Receptionist responsibilities.***
6. ***Develop and create intentional Volunteer Staffing positions that are supervised by the Building Manager for building security.***

These recommendations were set as a medium priority by the Prudential Committee, and it is one that most congregations already have the needed experience to implement. If you have ever hired an employee for the congregation, you can hire a volunteer staff member. A position description, schedule, and a hiring process should be developed. The hiring should be conducted by the Senior Clergy Leader (as Chief of Staff) with the church staff member who will be directly supervising the volunteer staff position. The position description should be designed in line with the other position descriptions of the congregation. I can be available to consult with the congregation in developing the position descriptions and hiring process for this Volunteer Staff position. Realize you may hire multiple people for the same position description and have them work at different scheduled times.



Volunteer staff are “paid” in three ways, and the planning for implementing any volunteer staffing system should take into account building the positions to incorporate all three. First, volunteer staff are given access to the paid staff as if they were other paid staff. This means including them in staff planning, covenanting, and mission discernment. Second, they are “excused” from any other leadership responsibility in the congregation. While they can volunteer in other areas of the congregation, they may not serve as committee chairs, team leads, or governance leadership. This may sound at first like a sacrifice that they make, but most people love being freed of the feeling that they should take on that level of congregational leadership. And lastly, they are “paid” in gratitude. Plan for ways for the paid staff and the congregation to show their gratitude for the volunteer staff. My two favorites were the “volunteer staff” parking and the annual “volunteer and paid staff ice cream and massage party”.

7. ***Develop a 2-3 year phased plan for raising salaries to reach the Large I size rating in the UUA Salary Recommendations for all staff positions.***

Below is an analysis of where the congregational staffing positions currently sit in relationship to the UUA Salary Recommendations, with the transition from a Mid-



size III congregation to a Large 1 congregation. This is focused on the senior Program and Administrative staff, and not the subordinate part-time positions.

Position	Midsize III	Large I	Difference
Settled Minister	At midrange	Midway between minimum and midrange	Approximately \$10,000 to reach midrange
Religious Education Director	Above midrange for a Credentialed Religious Educator, just under midrange for a master's level Credentialed Religious Educator	Approximately \$2000 above minimum for a Credentialed Religious Educator, at Midrange for an Associate Credentialed Religious Educator	Approximately \$9,000 to reach same level as before for a Credentialed Religious Educator
Membership Coordinator (calculated outside of recommendation 2) Approximately 0.33 FTE	Approximately \$1500 above midrange for a Membership Coordinator, Approximately \$2000 below midrange for a Membership Manager (at current FTE)	At midrange for a membership coordinator, approximately \$3000 below midrange for a membership manager (at current FTE)	No change to meet midrange as a Membership Coordinator at current FTE
Music Director (FTE is difficult to calculate, approximately 0.4)	At midrange for non-credentialed Music Director	Midway between minimum and midrange.	Approximately \$3500 to reach midrange at current FTE





FTE)			
Administrator	Approximately \$1000 above midrange	Approximately \$400 below midrange	Approximately \$1400 to reach same level
Administrative Assistant (Bookkeeper in the UUA Salary Recommendations)	Approximately \$800 below midrange	Approximately \$2000 below midrange	Need approximately \$1200 to maintain same level



Not including the calculations for significantly part-time staff, I calculate that it will take an increase of approximately \$25,100 to bring all staff members back up to their relative positions on the spectrum of each salary recommendation, with the transition of the congregation from Midsize III to Large I in congregational size. This number does not include the additional costs for Recommendation 2. However, no staff members (at the senior program and administrative staff level) have fallen below the minimum salary level recommendations with this size transition.

I am recommending the congregation develop a phased plan, over a period of 2-3 years, to raise salary levels to reach the relative places each staff member was previously on the spectrum between minimum and maximum salary recommendation levels. This plan should make a priority those who are at the lower end of their spectrums. This 2-3-year plan will also allow the congregation to determine whether the new congregational membership levels will continue to grow or recede.

8. *Develop a 5-year phased plan to transition the Church Administrator position into an Executive Director position, to include an increase in staff supervision and governance accountability.*

The implementation guidance for this recommendation is that the Prudential Committee of First Unitarian Church of Providence ask the Personnel Committee or a sub-committee of the Prudential Committee to study this possibility and return to



the Prudential Committee with a recommendation if this is something the congregation wishes to pursue. This will take some intentional work to discern in what ways the role of the Church Administrator would change, including what aspects of the Settled Minister’s responsibilities would be incorporated into the newly designed Executive Director’s position. This study would also involve exploring the models and roles of Executive Directors in other Large UU Congregations.

For Salary comparison, the “Business Administrator” position in the UUA Salary Recommendations would be the most appropriate initial salary guideline, and it sets the salary recommendations for this position in a Large 1 size congregation as follows. I have also added the current Salary Recommendations for Congregational Administrator for purpose of comparison.



Position Description	Large 1 Minimum	Large 1 Mid-range	Large 1 Max
Business Administrator (Initial position for Executive Director)	\$58,400	\$72,900	\$87,300
Congregational Administrator (current position design)	\$43,600	\$52,400	\$61,250

9. Implementation of a Susan Beaumont style Church Staff Performance Management system, with a formal supervision and evaluation system.

The current staff at the First Unitarian Church of Providence is high functioning, works well together, and is utilizing a system of supervision that works well in that environment. However, my assessment is that the system of supervision, managed by the Settled Minister and by the staff supervisors would not handle significant staff performance issues well. This recommendation is to have the Settled Minister



and the Administrator together attend the Stepping Up to Staff Supervision workshop, and implement that program within the congregation before it is needed.

When you have a high-functioning staff, then having a formal staff supervision program is one of those priorities that gets superseded by all the other priorities. However, when you need to do significant performance improvement with an employee, it is too late to then try to implement a system to do that performance improvement.

The next scheduled workshop series for the Stepping up to Staff Supervision is August 27th and 28th at Luther Seminary in Minneapolis MN. I am also aware that an effort is underway to bring that workshop to the Western New York / Eastern Ohio area specifically for Unitarian Universalists next fall. The next training can be accessed at <https://lutherseminary.regfox.com/2019-stepping-up-to-staffing>.

Alternatively, the congregation could contact another congregation using the system, and receive coaching on implementing the ideas in “When Moses Meets Aaron” by Susan Beaumont and Gil Rendel.



10. The Prudential Committee participate in a “Board Read” during the next calendar year: Inside the Large Church by Susan Beaumont.

11. The church program staff and senior church administrative staff, as well as the Personnel Committee participate in a “Staff Read” during the next year: When Moses Meets Aaron by Gil Rendle and Susan Beaumont.

Though these recommendations were rated lower in priority than many of the others, I cannot stress how important each of these is. One of the keys to a successful cultural change is that the congregational leaders and staff need a shared vision of where it is you are going. You need a common language, and a common framework in which to discuss and discern the cultural changes that you are attempting.

I would not only conduct a Board Read of Inside the Large Church and a Staff Read of When Moses Meets Aaron, I would buy the book for each new Prudential Committee member and each new staff and Personnel Committee Member for the foreseeable future, and ask them to read the book as a part of taking on their leadership roles. It is less what you learn (although you will learn some necessary things) but more how you get a shared language and framework for the changes



that will be needed to shift First Unitarian Church of Providence into a Large Church system.

Personally, I like the model of reading a chapter a month, and dedicating time to discussing together at each Board Meeting or Staff Meeting. But you all will figure out what works best for you. Perhaps a leadership and staff retreat dedicated to discussing together the texts.

12. A professional and objective assessment of the congregation's giving capacity towards the increased staffing costs of the recommendations of this assessment.

Of all the implementation guidance, this one is the easiest for me to give. First Unitarian Church of Providence needs a professional consulting firm to take a look at congregational giving capacity. There are many such firms out there, and the one with the endorsement of the UUA (and therefore the only one I can recommend) is Stewardship for Us. <https://stewardshipforus.com/> Their primary tool for this work is the "Next Steps Weekend" but they have other tools that can help to assess the congregational giving capacity.



It has been my honor and joy to work with the leaders and staff of the First Unitarian Church of Providence in developing this Staffing Assessment. I look forward to supporting your congregation as you discern what is the right path for developing both the congregation, and your congregational staffing design, in order to best live the mission of our living tradition in the world.

Rev. David Pyle
Congregational Life Consultant
UUA-NER