

Cluster Leadership Conference Notes

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SESSION NOTES

Administrators' Session

Robie Evans, Director of Ops at FUUSD

Questions for Discussion

1) *What can we do better together than separately?*

- *Human Resources Compliance / Regulations Updates*
- *Best Practices – Efficiency*
- *Helpful Technology / Software*
- *Volunteer Network / Cultivation / Training*

2: *What is working well for our group?*

- *SUUN Board – meeting together consistently*
- *Admin Group – No swaps*
- *Administrators should have mentoring groups to share different areas of expertise.*
- *Admin Group – training for members when administrators go to church, but are not “on the clock.” It’s hard to be at church because members still think you’re at work and ask questions. Administrators can “train” members by letting them know they’re not working; or asking them to send an email with their question, etc.*

3) *What methods, processes, strategies, best practices, etc. can we share:*

- *Every single thing you do, make sure you have all the details planned ahead of time. “The devil is in the details.”*
- *We could share the expense of trainings*
- *Joint Ownership – example: NonProfit Management Solutions*
- *Property consultants for capital projects (Southern Cross Property Consultants) Outside contractors are helpful. Saves conflicts among members, but communication is very important during all phases of a capital project.*

4) *What challenge areas do we have:*

- *Financial – fundraising, spending, safeguarding*

- *Conflict Management*
- *Management Change*
- *UUA Retirement Plan changes*
- *Administrator – wears many hats; must have flexibility*
- *Regular Communication*
- *Cultural Diversity / Belief Diversity*
- *Year Round Giving Process*

5: Is there specific training that would help us?

- *Human Resources Law updates*
- *OSHA updates*
- *Software Training (Excel, Word, etc.)*
- *What can members do to help Administrators? This is hard as deal with the most confidential areas of the church business.*

RE/ Lifespan Session
Kathleen Moscato

What Can we do together better?

- *Cluster Youth activities*
- *Sharing curriculum*
- *Conferences for UU Youth to build connections*
- *MUUGS (Middle School UU Gatherings)*
- *Specific Training to help in R/E and Lifespan*
- *Website for cluster to share curriculum, successes/challenges*
- *Youth groups to train adults on social media*
- *Internet communications, SUUN, Webinars*
- *What Can we do together better*

- *OWL and Coming of Age*
 - 1) *Build numbers of participants*
 - 2) *Find money for training facilitators*

Social Justice Session
Kristen Kuriga

1) *What can we do better together than separately?*

What are our common issue areas—and what are we working on—share a list of our partner organizations and generosity offering recipients coordinate San Diego Cluster with the UU Justice Ministries of CA Cluster (formerly UULM)

1 or 2 key events—witness or service planned our ahead of time

cultivate common partner organizations

organize cluster to do advocacy together

utilize social media to organize cluster events

Lots of groups working on immigrant justice

can we reflect together on the homeless shelter?

Create a quarterly social justice newsletter?

2) *What is working well for our group?*

single events—turning our congregation—Chalice—short term projects

First UU focus areas to work on—Immigration, Reproductive Justice, LGBT Equality, Civic Engagement and Economic Justice

partnering with local organizations—service oriented committees

Summitt—good at collecting money and donations—not out on the streets

integrating reflection into the work—moving from service to advocacy

3) *What methods, processes, strategies or best practices can we share?*

UUA social justice empowerment program

Shared calendar

communication

making strategic choices about when we mobilize our congregation and

Ministers for action

social justice focused worship

****important need for increased communication in the cluster—*

centralized place for all areas

4) *What challenge areas do we have?*

need for a rapid response team based on different issue areas—gather the forces

*cluster work—don't have buy in from the Ministers—need commitment from the top
some Ministers will show up
missed opportunities—not able to respond to immediate events*

*5) Is there specific training that would help us?
education & training to develop leaders to move from service to advocacy and community organizing
social justice leadership training
San Diego Organizing Project Training on community organizing
UUJMCA Cluster Training
UUA Social Justice Empowerment Handbook Training—trainer for the cluster?*

Social Justice Leaders List from each Congregation Jan 2014

<i>UUFSD</i>	<i>Irv Himelblau</i>	<u>ihimelblau@gmail.com</u>
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Music Session

Vicky Newman & Andrea Newhall

What can we do better together than separately?

- *Share music (Chalice has Excel file). Consider creating a Cluster file of music at various churches & share list on Google docs or on DropBox*
- *Combine choirs for a Cluster music event (like Sources)—perhaps each year.*
- *Participate in regional choir activities as Cluster (like UUFSD & Summit participating in UU choir event in Pasadena Jan14).*
- *Cluster music event (music festival) featuring UU musicians, choirs, and/or a sing-along.*
- *Consider a Cluster-wide “Cabaret.”*
- *Concert schedule sharing & promotion. Cluster-wide musical events calendar.*
- *Creation of music – musician cooperating with each other & congregants. Theme-based original music.*
- *Create a common canon of music (hymn of the month, so everyone knows same songs. Consider singing “hymn of month” before or during service—so more learn/know hymns).*
- *Community outreach through music (small groups, flash mobs).*
- *Encourage Cluster-wide congregante participation in musical events.*
- *Create more opportunities for musicians of various skill levels to participate in musical events (for example, create resource list of music [with guitar chords] to share.*
- *Kathleen will do a “place of music in worship” sermon (share these opportunities among Cluster).*
- *Consider a Cluster Youth choir for smaller churches.*
- *Create opportunities for Music Directors to meet/work together on a shared project.*
- *Need a SUUN to create list of musicians and musical groups at each church. This would facilitate invitations to perform at different churches.*
- *Consider posting Order of Service for Music Services.*

- *Create choir exchanges (same day once or twice a year).*
- *Sharing choir members (for example, if need a tenor, is there a list of those available).*
- *Consider creating a sight-singing class.*
- *Schedule Cluster-wide musical events at various churches.*
- *Create a SUUN concert series (promotion ideas ... offer discount if purchase series tickets). Ideally these SUUN concerts would be scheduled at various churches and no more often than once/twice yearly. Helpful to plan year in advance & then promote in each church.*
- *Share info on handling music when transition to more than one service.*
- *Fund-raising to support music staff participation at Cluster-wide events (as time required generally exceeds regular paid hours).*

What is working well for our group?

- *Jam sessions leading up to Music Service.*
- *Singing familiar hymns.*
- *Youth choir at First UU brings in new UU members.*
- *Fund-raising concerts.*
- *Forming of new, smaller musical groups (PUUF) or specialty choirs or bands.*
- *Music Director alerts congregation of worship theme, so ideas come from congregants (?).*
- *Cabaret (Chalice).*

What methods, processes, strategies, best practices, etc. can we share?

- *Share info on handling music when transition to more than one service.*
- *Share music.*

What challenge areas do we have?

- *Vetting music, musicians through Board, Minister, Music Director.*
- *Possessiveness of musicians (reluctance about using musicians from other churches).*
- *Calendaring concerts to avoid date conflicts (consider creating a Cluster-wide concert calendaring meeting at beginning of each church year).*

Is there specific training that would help us?

Describe any best practices, methods, etc. that would benefit all the groups.

Describe any training that would be helpful to all the groups.

Describe any actions or events that could be accomplished better as a Cluster.

Outreach/Publicity/Communication

Suzette Southfox

13 people attended this session.

Questions for breakout groups to discuss:

- 1) *What can we do better together than separately?*
 - a. *Several years ago we had an advertising campaign within the cluster – radio & TV. Not too successful in terms of bringing new people into the churches, but it was very well done.*
 - b. *What about a billboard campaign – strategically placed for all ages.*
 - c. *Social media campaigns. SUUN has a Facebook presence: SDSUUN on Facebook.*
 - d. *Meet up works for Palomar, brings new people into specific events.*
 - e. *SUUN may lead annual themed PR campaigns.*
 - f. *Have a UU presence at various community events – like a booth at Gay Pride and Earth Fair.*
 - g. *Cluster wide website. Use this or other methods to share calendars, events, curriculum, resources, Drop Box, classes, OWL program, etc.*
 - h. *Yahoo group for those resistant to Facebook.*
- 2) *What is working well for our group?*
 - a. *Music as an outreach action – First UU youth choir bringing non church members into church*
 - b. *Those with active websites can search activities well*
 - c. *Constant Contact – E News*
- 3) *What methods, processes, strategies, best practices, etc. can we share?*
 - a. *Local papers, Sunday paper – may be able to have articles put in*
 - b. *How to develop connections with editors, writers, papers and other new outlet sources*
 - c. *Reader's Sheep's & Goats section*

- d. *Each congregation can be aware of and promote local projects, events and concerts at individual churches*
- e. *Share a master calendar!!!*
- f. *Share the process of capturing visitor information and follow up methods within the cluster*

4) *What challenge areas do we have?*

- a. *Many UUs are not comfortable speaking about their church, their religious identity and cannot invite people into or promote Unitarian Universalism*
- b. *Often people come from other religious traditions that have given them a distaste for evangelizing*
- c. *We have a lot of activities that would interest the general public but not always the energy, skill or systems to promote these*
- d. *Making sure that people know how to be welcoming in genuine and sensitive ways – not have our “hospitality” be a posture but very real.*
- e. *How do we deal with being welcoming AFTER the first visit, before membership*
- f. *Make sure that each congregation has ways to MODEL for its own community, how to be with newcomers, visitors etc.*

5) *Is there specific training that would help us?*

- a. *Developing a communication strategy for internal communication within each congregation, communication within the cluster congregations AND communication with the greater world.*
- b. *Developing a cluster wide marketing strategy.*
- c. *Learning HOW to use religious language, how to invite people into this “Good News”. This needs to come from the pulpit and grow from there.*

Fundraising and Stewardship

Brenda Balmer, Palomar UU Fellowship, facilitator

Morgana Mlodoch, Chalice, scribe

By way of introduction, the point was made that in the areas of fundraising and stewardship, it must be kept firmly in mind that the ultimate goals are spiritual, not material.

I. What can we do better together?

It was noted that Fundraising has traditionally been congregational. Each congregation makes its own budget and does its own fundraising. But by cooperating, we might, through sharing best practices, be more effective in congregational fundraising, as well as possibly on more general fundraising.

a) Much of what we potentially can share comes by measuring fundraising success or failure through data available through such applications such as Constant Contact, even FaceBook. Constant Contact provides fairly complete metrics, allowing analysis of email initiatives by outcome. It was suggested that Cluster congregations could pool their results for a larger sample set. This sort of data analysis could be applied to individual initiatives, as well as overall fundraising.

b) Cluster congregations might also cooperate on larger fundraising efforts, the proceeds of which could be split.

II. What is working for your group?

The consensus was that Auctions, along with more traditional pledge drives, fulfill a reliable need for fundraising. But auctions generally

feature a lot of parties as auction items, which people outside the congregation would not feel comfortable attending, and so are not publicized in the community. Palomar Fellowship reports fundraising success by charging nominal admission to their Metaphysical Fair. Summit Fellowship raises funds through a Craft Fair, and has held Rummage Sales.

III. What methods, processes, strategies, best practices, etc. can we share?

a) In terms of Auction fundraising, it was suggested that there is software that can aid in organization.

b) A system of ‘sustaining’ memberships, in which monthly donations are debited electronically from the donors’ bank or credit card account, or through PayPal, was suggested as a highly effective way to create a reliable fundraising base. First Church has an automobile donation program, but has had difficulty finding a dedicated volunteer.

c) First Church no longer approaches pledging as a once a year affair. In this strategy, potential donors are grouped into tiers: the most forthcoming are asked on a more regular basis; but those less forthcoming are divided into twelve groups, each asked only once a year, rotating by month. This system avoids the inevitable yearly ‘pledge fatigue.’

IV. What challenge areas do we have?

a) It was stated that getting people to take ownership of special events is a challenge.

b) Burnout is a constant challenge, both for leadership and the congregation.

c) Getting people involved from the membership level.

d) Linking fundraising to congregational mission and passions.

e) Demonstrating the value of congregational membership.

f) Integrating other committees into Fundraising. For example, in its activities, could Social Justice help in fundraising, perhaps by selling Fair Trade coffee?

V. Is there specific training that would help us?

a) It was suggested that a future Cluster meeting might feature a professional fundraiser, or perhaps the UUA has consultants available. This would be an opportunity, among other things, to learn about data analysis.

b) Training and information on PayPal, as well as software such as QuickBooks,

E-Tapestry, and Powerchurch would be thought to be useful on a Cluster level.