

June

UUA General Assembly ~ Salt

Lake

City 2009

Leadership in

Lean Times

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Florida District UUA

2

Leadership in Lean Times

Our Goals:

To provide congregational leaders with tools to manage church finances in a time of economic ambiguity and recession.

To Remind Leaders that good ministry
& good leadership are the same at
any time.

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3

Premise: Leaders' primary
roles:

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Self-regulation: modulating one's own anxiety in
an
anxious
field, present to but not defined by.

Managing Reactivity: knowing how to lower
anxiety or
calm

the system to help everyone regain the capacity to
think.

Honoring Resistance ~ Persistence: Avoiding
the
tendency
to bully one's way through recalcitrance.

Setting Limits: Knowing when and how to draw a

line
and not
catering to the most anxious voices in your
congregation.

Self-definition: taking stands on principle,
values, and
congregational mission.

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4

Desired outcomes:

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Some understanding of the way **anxiety** is an
infectious
disease;

Learning about potential **mistakes** to avoid;

Discovering new **opportunities** that might arise as
the

congregation rethinks its focus;

Identifying opportunities for **pastoral ministry** to
members whose

lives are being affected immediately [e.g, ministry
to

members

losing jobs or being foreclosed on mortgages].

The role of the **leader's presence** and the

management
of
anxiety.

Lifting up **best practices** for financial stewardship.
Practical **tips** for donor relations.

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“Leadership is the spiritual process of discerning what one believes (clarity), acting on that belief in the public arena (decisiveness), and standing behind that action (responsibility) despite the varied responses of people (courage).”

- Rev. Frank Thomas

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“Leadership is the ability
to hide your panic.”

Rabbi Dr. Edwin H. Friedman

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6

“Anxiety is

a n

I n f e c t i o n s

Dis-Ea s e”

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7

Leadership in Tough Times!

This is not what you signed up for

when you

became a

congregational leader.

Lean times are anxious times.

Anxious times stir up systems issues.

Anxiety is contaminating: it confuses issues in
new

ways.

Anxiety interferes with values and clear-
thinking:

this

makes a leader's life hard.

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“Anxiety is a n I n f e c t i o n s D i s - E a s e”

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Leadership in Tough Times!

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Leadership in Lean Times

Is it time
to panic
yet?

If not now,
when?

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Leadership in Tough Times!

With a p o l o g i e s t o K i p l i n g ~

“If you can keep your head when
all about

you are losing theirs and blaming
it on

you, ...”

... Then perhaps you do not under-
stand

The seriousness of the situation.

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Leadership in Lean Times \$

10

Leadership in Tough Times!

Some of the things we’re going to ask
of you

will actually make it harder.

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Leadership in Lean Times €

11 T

The System Under Stress:

Catastrophizing as a coping tactic: *Chicken
Little.*

Four common **Avoidance** tactics.

Ostrich head in sand.

Pollyanna’s false assurances.

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Re-arranging the chairs.

Fights.

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12 Denial is not a river: Symbols of panic and worry.

Resistance to talk openly about issues.

Reluctance to asking for money and commitment.

2nd guessing previous decisions: don't bail but re-negotiate when necessary.

E.g.: Building projects and staff expansion.

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The System Under Stress:

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How Goes It?

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Your expectations for next year, same questions.

Has your mission changed?

Compared to last year:

How is your congregation faring financially?

How has your congregation's attendance changed?

How has your membership change?

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14 Varying Responses to Lean Times:

Congregational Expansion/Extension.

What was in the congregation that allowed it to see an opportunity?

Expanding on congregational mission?

Congregational "Right Sizing."

How has necessity created opportunity?

Congregational Dis-Integration or Re-Organization.

Where was the leadership?

What went right or wrong?

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Leadership amidst anxiety.

Actively promote dialogue regarding current conditions.

Cultivate the ability to be present to other people's anxieties.

Actively choosing acute pain: “facing the music.”
Choosing to “take the heat” of congregational upset.
Being present to the RELATIONSHIP and the TASK.
The “1/9” people-focused manager;
The “9/1” task-focused manager.
Leaders seek to be “9/9”! **Relating** is the **Task**.
See next slide.

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16

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17

Leadership amidst anxiety.

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Dare to take actions that may
increase other people's
anxieties.

Conduct a face to face stewardship
campaign.

Require a balanced budget with no
“monies to be raised” items.

Ask for more money!

Ask for % of income not fixed \$ giving.

E.g., \$1/week/\$1000income = 5%.

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18

Leadership amidst anxiety.

Take care not to transfer personal circumstances

— their

own and others — to the congregation.

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Manage “triangles.”

Be alert to overlap among family/church/societal issues.

Notice how members act out around congregational issues that echo their person circumstances.

E.g.: Person at risk of losing job arguing for severe cutting of expenses.

E.g.: Person facing foreclosure arguing vigorously against purchasing new property.

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19

Leadership amidst anxiety.

Speak to spiritual issues of “power” and “powerlessness.”

Unitarian Universalism’s optimistic “onward & upward” attitude and being self-responsible in the face of events beyond one’s control.

Issues of shame & failure.

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What good does it do for people to win the whole world yet lose their souls? Mark 8.36.

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Know success in life in new ways.

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Leadership amidst anxiety.

Expect & prepare for increase of conflict.

Practice anxiety reduction strategies.

Congregations shouldn't forget to have fun with each other.

Creating a conflict management or "CALM" committee.

Practicing the steps of "right relationship."

Seek more training & coaching, work the peernetworks.

Isolation breeds failure, connection success.

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"If it can be done alone in church, it probably shouldn't be done." kgh

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Leadership amidst anxiety.

Always look for opportunities with:

SWOT analysis or Appreciative Inquiry.

What does our Mission & Vision ask of us right now?

Showing up in the external community, notably

"community-based organizing."

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“A crisis is a terrible thing to waste .”

Rahm Emmanuel.

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Leadership amidst anxiety.

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Presidents: How did this year change your role from what you expected?

How are you speaking differently to your members?

Finance people: What are you hearing from your people?

How are you talking about money differently?

Membership/Caring team: How has this year affected your work?

How are you connecting with folks in difficulty?

Ministers: How are you shaping your preaching, pastoral care & educational offerings?

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23 What we have learned.

Current Trends.

Historically and our most recent information: giving to congregations

*is surprisingly resilient, amazingly resilient in a recession.
GivingUSA Foundation: in spite of a 5.7% overall decrease
in
charitable giving in 2008, giving to religious organizations
increased.*

*We can't tell you what your own experience is or will be.
Be realistic and empathetic of the financial hardships of
donors, don't
assume for people what they can afford.*

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24 What we have learned.

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Five things not to do.

- 1. Don't assume the worst!*
- 2. Don't pull back from what is difficult!*
- 3. Don't pull back from good communication!*
- 4. Don't mistake acting decisively for acting precipitously.*
- 5. Don't forget your ideals as a faith community!*

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25 What we have learned.

Five practical steps.

1. Do an excellent job on your annual stewardship drive.

Gets you the most money. It does the best job of reducing uncertainty.

2. Ask yourself: What changes are needed at this time?

What things does this press you to deal with that you should be dealing with anyway?

Is it time to drop your paper newsletter or rethink that advertisement

that you have always run on the church page of your local newspaper?

Are there rental or employment arrangements that are not working and

have needed to be renegotiated?

3. Make friends with those who are best at communication and best at working with people.

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26 What we have learned.

Five practical steps.

4. Keep in mind how you want to be with each

other as a community.

The tougher the issue the more attention you need to pay to this.

Practice your deep listening skills.

Only one “ouch” or fear on the table at a time.

5. Keep ministry and mission first.

If you care more about the congregation’s financial distress than

about the distress in the lives of your members and the larger community, people are **not** going to give — and should not!

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27 What we want you to know:

National trends do not cause problems in

the congregation.

They do exacerbate existing fault lines:

Values conflicts.

Performance issues.

Lack of mission-clarity.

Confronting inappropriate behaviors.

Increasing tensions around little things.

Hasty generalizations and blaming.

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28 Tending to the Core:

With regard to *Worship:*

Speak to where people really live.

High quality presentation.

Appropriate confession of life issues.

With regard to *Pastoral Care:*

Providing ministries of support.

Job fares, financial counseling/planning.

Stress management classes.

With regard to *member-to-member support:*

Encourage members' support to each other.

Child care during job searches.

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29 Tending to the Core:

With regard to *Stewardship:*

Money as a spiritual reflection on our values and priorities, connecting to others.

This is not a time to step back, rather lean in to relationships.

Not to harass folks indicating no understanding of their circumstances.

Rather to ask: How generous do you expect to be?

Resist the avoidance of not asking:

Why bother, people don't have any money?

Lean in: being in more of a relationship.

Create an ok way of asking: *How are things with you?*

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30 Tending to the Core:

With regard to donors, pledgers:

Stay in relationship.

Know something of the story for each giver.

Ask: what's going on in your life?

No need for special changes.

Do what we always should be doing.

Conduct a sincere, above board, realistic and honest “ask” campaign.

Talk face to face about “our” ministry in these times.

Ask those who can to go some extra distance to make up for those

who cannot.

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31 Taking It Home:

Five Things you will share with your members:

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Creating a 3 way network.

Share learnings, excitement, disappointment, worries.

Collectively plan your next steps.

Money chat-line: "finance group."

Check in with two others from another congregation to see how things go.

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32 Additional Resources:

[available in .pdf format on the Florida District website, "church tools" section:

www.floridadistrict.org/]

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Unitarian Universalist Congregational Finance and Stewardship

Resources by Ian Evison

10 Steps to Successful Fundraising in Difficult Economic Times

by Wayne B. Clark

Best Practices for Congregational Giving During Tough Economic Times by the UUA Stewardship Consultants.

Basic Advice About Cutting Budgets by Ian Evison

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3 Before you go, we remind you:

How you approach leadership matters more

than

exactly what you do.

How you model **anxiety management** is more

critical than the particulars.

The **spirit** in which you do it is as important as

what you do.

Learning and growing as a community requires

doing somethings that may be tough but it is still

learning and growing.

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34 Leadership
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Thank you for your service.