

Shared Ministry Review First Parish in Lincoln

Spring 2018



MAY 23, 2018
FIRST PARISH IN LINCOLN
LINCOLN, MA



Shared Ministry Review

First Parish in Lincoln, Spring 2018

Introduction

A Shared Ministry Review (SMR), also called a Whole Church Evaluation, is one way that churches evaluate their mission and priorities, their ministers and staff, and the resources and structures that support them. This process will endeavor to clarify the strengths, aspirations, and areas for growth in First Parish Lincoln.

Common in many churches and to most organizations is the awareness that individuals are best reviewed with close attention to the context/environment in which they work. This approach is followed because there are aspects of one's work that are under a person's control and many that are not. Organizational psychologists emphasize that cultural, structural, resource, and governance factors are integral to the success of an individual's performance within an organization. Some of these are present and facilitative in a given work environment and some are neither. An accessible book, *Completing the Circle* by David McMahon, describes this complexity as it applies to churches and it is strongly recommended by the UCC for those who are engaged in evaluating a pastor in context.

At First Parish in Lincoln, as in many churches with a congregational polity, each member of the church has a responsibility to contribute to the spiritual, educational, social, and justice work of the whole community. It does not ignore the indispensable contribution of the minister, but neither does it locate the responsibility to lead, or its outcomes, solely in one person; the congregation shares the ministry (<https://www.macucc.org/wholechurchevaluations>). Through the SMR, the church has an opportunity to identify whether the requisite personnel, performance, policies, structures, culture, and resources are present to support the mission and the spiritual life of the church. This process has the opportunity to make course corrections and to engage the congregation in a process of deliberative action.

A typical Shared Ministry Review evaluates the Finances (e.g., Assets, Income, Expenses, Investments, Policies, Risks, and Stewardship), Organization and Structure (e.g., Governance, Membership, Personnel, Communications, Volunteers, and Demographics), and Spiritual Life (e.g., Worship Service, R.E., Outreach, Compassionate Care, Meditation, and Affinity Groups). The SMR Committee is charged with working with the congregation to clarify the strengths, aspirations, and areas for growth of the parish.

Methodology

The SMR team of 2018 comprised Chris Andrysiak, Mimsy Beckwith, Dan Boynton, Nick Covino (chair), Jillian Darling, Erika Heilman, Joan Mansfield, Joe Robbat, and Liz Wilkinson. This project was fortunate to have the assistance of a consultant, Rev. Dr. Claire Bamberg,

LMFT, PCC, and the prior preparation of a team led by parishioner Jean Welsh. The group has met monthly from January to May with additional subcommittee meetings. Three teams were created to address Finance, Organization and Governance, and Worship and Spiritual Life. Each team was assigned a series of questions and charges that will be found in their relevant section.

An effort was made to include previous church-related projects such as 20/20 Visioning, the 2014 Discernment Process, Annual Reports 2015–2017, and church communications. The team reviewed information from a number of sources (e.g., demographics, committee charges and reports, financials, and program activities of peer congregations). It conducted three Open Meetings (Finance, Spiritual Life, Organizational Structure); held four formal open small meetings; met with stakeholder groups (e.g., Outreach Committee, Meditation Group, YPC, Deacons, Care Committee, PC); and interviewed the church's staff. The committee heard from a number of individual members in person and through electronic mail and it held two group meetings of parishioners who requested the time. While the exact number was not tracked, 20+ interviews involving more than 150 persons were actively involved in this process. Some were present at both small group and open events and anyone who wished to contribute to this process had ample opportunity to do so. Information about the SMR was published on the church website that was accessible through <https://www.smr.fplincn.org>.

Interviews followed an *Appreciative Inquiry* (Cooperrider, D.L., & Whitney, D., 2005) format. This method of data gathering asks three questions:

What do you personally value about First Parish?

Where would you like to see First Parish be in two to three years?

What do we need to do to get there?

The first question allows an individual to articulate what is most personally appealing and it permits the group to see that there are similar values held in common. The second question, with its tight time frame, invites criticism, complaint, and compliment while directing the focus toward productive expressions in all three general categories. Discussants build upon strengths and express approval for what is working and dissatisfaction and disappointment about what is not. The third question asks for short-term solutions, to focus frustrations positively and to emphasize solutions. Every interview followed this format while allowing leaders the opportunity to ask clarifying questions and members to delineate their ideas.

Data gathering was intended to: create a common set of facts and information; inventory existing policies, procedures, committee charges and programs; and compare these to several churches of similar size and demography. Data review looked for trends across time, important omissions, and comparisons to better practices. An analysis of the church's financial picture was conducted for the past 10 years and its current accounts and position were compared to those of several peer churches. An audit was conducted of existing committee charges and composition, governance policies, and procedures and a comparison was made of spiritual-life opportunities and communications with area churches. It was the intention of the team to compare financial information, governance documents, and worship services with three comparable churches in

each of the UUA and UCC traditions, but only four churches responded to multiple requests for information. Thus, broad comparisons were not able to be made, but the cooperating churches offered useful examples and anecdotal information.

Results

Data analysis was calculated for the financial information in response to the questions asked of the Finance subcommittee. The committees completed their audits by interviewing relevant staff members and reviewing available documents. Comparisons were made of FPL to itself over time and with information acquired from several peer churches. Observations were drawn from data gathered as well as from the interviews conducted.

The four apparent priorities of the 20/20 Visioning exercise were presented for rank-ordering to a majority of those interviewed. As the committee identified issues to be improved upon, they were presented to the appropriate decision-maker. The results of the interviews were discussed within the committee and they gave rise to four superordinate themes and several considerations. Since this vehicle was meant to include an evaluation of the minister, particular references to his performance were recorded and placed in context. However, in light of the minister's resignation midway through the process, specific remarks about Rev. Mishra-Marzetti's performance will be filed with the PC and Deacon Chairpersons and shared with Rev. Mishra-Marzetti apart from this report. The space for the minister's review was reworked to reflect some of what we might optimally search for in a new minister.

Each of the three teams will report out by their relevant subcommittees. They were charged to answer specific questions, to conduct an Audit, make Comparisons of FPL over time and with several peers, offer Observations, and suggest further Actions to be undertaken by the church community.



Finance

Chris Andrysiak, Jillian Darling, Joe Robbat

The SMR Finance subcommittee reviewed financial records, stewardship records, investment statements, and insurance policies. We did not have access to (nor did we seek) household-giving records. We met with the Treasurer, the Parish Administrator, the recently appointed Investment Committee, our insurance agent, the Facilities Committee, and the Outreach Committee. We solicited questions from the congregation. We also exchanged data with two peer churches, in Lexington and Wayland.

Our work was organized around four questions:

Financial strength: *How financially strong are we, compared to relevant benchmarks?*

Financial processes: *Do our financial processes and infrastructure contribute to good use of resources, congregational confidence, sufficient input and information sharing, and personnel?*

Risk: *Are we well protected against plausible risks?*

People resources: *Are our volunteer and staff resources sufficient and efficient?*

Our highest-level summary findings are as follows:

Financial strength: The deficit trend of the last three years is unsustainable by our endowments over the long run, so in the short term we need to invest our financial and human resources wisely with the goal of driving membership up to sustaining levels. Over the last decade a significant decrease in stewardship income (driven by a 36% decrease in stewardship pledges) has created significant deficits that peers are not finding. However, income and some principal from our ~\$2 million in unrestricted endowment and funds allow us to maintain programs and services that peers may be unable to do in similar situations.

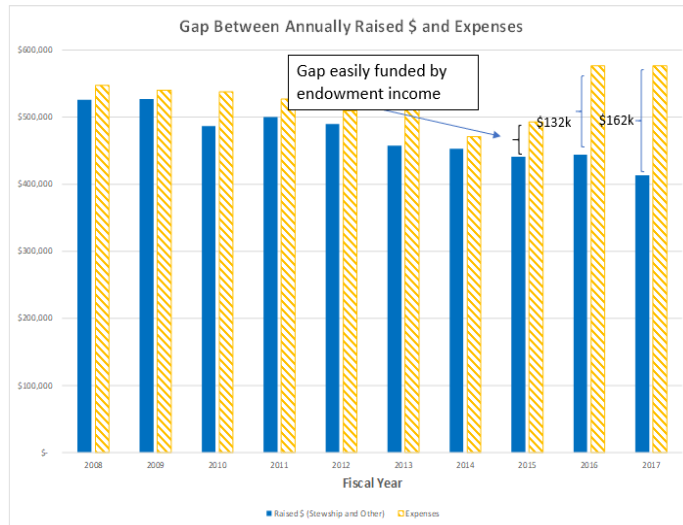
Financial processes: We have good processes regarding budgeting and expense management. We also devote considerable time to Outreach and Facilities decisions. We would like to see improved people-management processes (i.e., formation of a Personnel Committee) and more time devoted to revenue-generation activities.

Risk management: We are wisely insuring all insurable risks and follow sound business practices designed to reduce other risks. There are some processes that could be improved to reduce small risks, but we believe that the church is well-protected against the most significant risks.

People resources: Our Parish Administrator, Treasurer, Finance Committee, and outsourced Bookkeeper appear to be sufficient resources to serve the church's financial-management needs. However, the Parish Administrator (in her role for more than 20 years) is a role with single-point-of-failure characteristics, and the Treasurer role has been a difficult job to fill.

Financial Strength

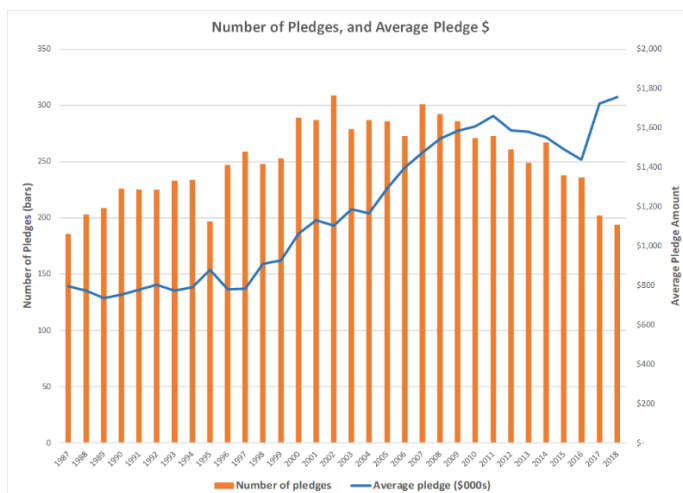
FPL has had operating deficits for years. By “operating deficits” we mean that the revenue collected in a year is less than the operating expenses for that year. The gap between expenses and revenues (operating deficit) has generally been filled by investment earnings from our endowment and funds. In fiscal years 2016, 2017, and 2018 (almost completed as of this writing), the gap has been much larger than in the past, as seen in the chart which follows. The ~\$2 million in unrestricted endowment and funds are not large enough to fill a gap this large on an ongoing basis. As a result, the gap between revenues and expenses must be addressed with a sense of urgency. A 4% withdrawal rate, often used as a sustainable withdrawal benchmark, would have us withdrawing \$80,000 per year on a \$2 million balance.



Our annual giving has not been sufficient to make contributions to the capital fund. Analysis done 10+ years ago suggests that \$74,000 per year should be set aside to fund capital repairs. That figure is likely low today given inflation. We made modest contributions to the Capital Fund from stewardship in the mid-2000s but have not done so since then. This approach is not inherently problematic, but it does necessitate doing a capital drive every 10 years or so. We will likely need another capital drive in three to four

years.

Declines in Stewardship have been the principal driver of the recent high operating deficits. The number of stewardship gifts has fallen by 36% over the last 10 years. During the period from FY 2007 to FY 2018 (11 years) we went from 301 pledges to 194. The largest year-over-year decline was in FY 2017, but the number of pledges did decline in eight of 10 years. These years were turbulent ones for the church, with construction of a controversial new building and associated capital campaign, the retirement of a long-serving and popular minister, an interim minister, a new settled minister, and three Religious Education leaders in four years. These things, coupled with societal trends away from religion and the Great Recession, very likely contributed to this decline in giving.



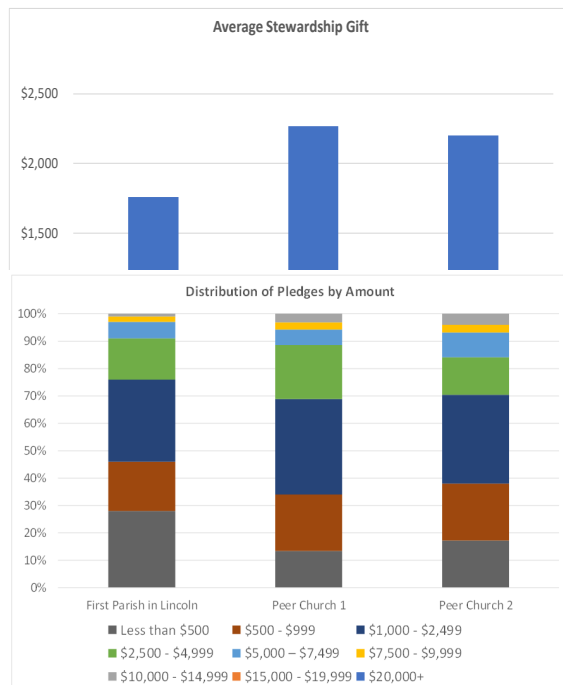
Encouragingly, the average pledge

Note: Stewardship data in this report is from the 2016-17 church year. For the 2017-18 year, and including both the 75/75 campaign and the spring stewardship campaign (not yet complete), FPL's average gift appears to have risen to levels comparable to our peer churches.

amount has increased dramatically over the last two years and appears to have increased further (significantly) in the current campaign. As it has become apparent that the number of pledges has been dropping, loyal members of the

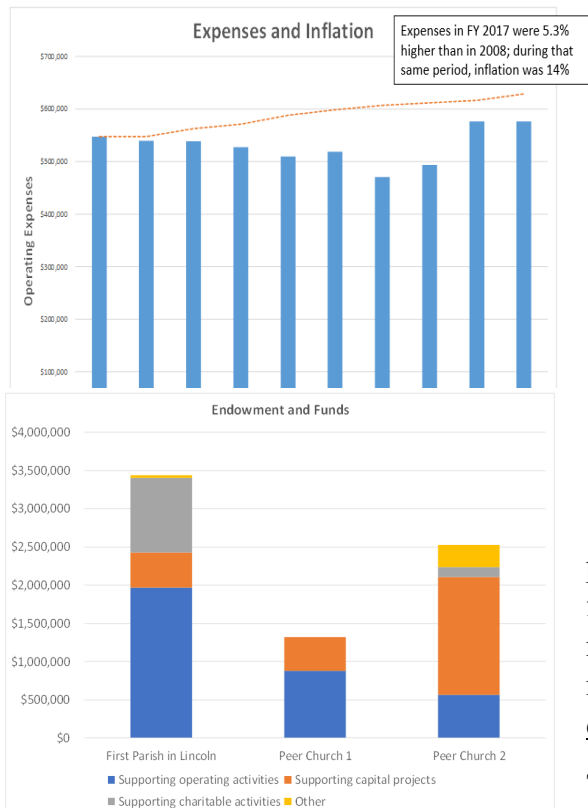
church have responded by increasing their gifts. That said, until this year, our average pledge has compared unfavorably with the averages for the two peer churches we studied. The new Generous Giving committee is shifting our fundraising paradigm, making giving a full-year process rather than the spring-only stewardship drives of the past. Using this approach, FPL's average gift has risen to the levels of the peer churches. [Note: the current campaign's data are

not yet final and are not included in the charts included herein.] When comparing the



distribution of our pledges to that of peer churches, we find that we have somewhat fewer pledges in the \$10,000–\$15,000 range, and many more gifts in the <\$500 range.

During this decade of falling stewardship revenues, FPL has managed its expenses to within an acceptable range of operating deficits until recently. Expenses in 2017 were only 5.3% higher than they were in 2008, compared to inflation of 14.9% during this period. The Parish Committee and Treasurer kept expense growth down by cutting the Outreach budget significantly, and by constraining staff pay raises to cost-of-living adjustments, if that. However, we have re-set compensation for certain positions to market levels when new employees have joined us.



FPL has significant financial assets. The endowment and funds total \$3.8 million (as of December 2017). Of this, 56% are funds that can be used to support operations, 15% can be used for capital expenses, and 29% are earmarked for charitable purposes. In addition, the church owns three buildings and a buildable lot to the north of the Parish House. Our endowment and funds are larger than those of our peer churches.

These assets give us flexibility, but also give us an “out” if we don’t raise enough money through stewardship. In response to this, the

Parish Committee has recently put in place a policy limiting draws from the endowment and funds. The most important conclusion we reach related to these assets is that we have the financial resources to make investments in programs designed to grow membership.

This leads into one of our most important conclusions, which is that we must make it a very

high priority to build or strengthen programs that will increase membership. We may be able to

continue to increase the average pledge, but a much healthier approach is to increase the number of households that are enthusiastically supporting FPL. This will happen if we have strong programs, top-notch staff, and an engaging community. We have the financial assets to invest in building stronger programs. While there may be continued pressure to constrain expenses, we believe that cutting expenses would mean weakening programs, which would be counter-productive to growing membership.

Financial Processes

We have observed generally good budget and expense management at the church. We budget conservatively and almost never over-spend our budgets. Conservative budgeting results from the difficulty in increasing the church budget during the church year (requires a vote of the congregation). Most FPL expenses are predictable (e.g., compensation), but one significant budget item is not: utilities. In addition, the timing of our insurance-policy renewals is such that we generally do not know the year's insurance premiums at the time that the budget is approved. Accordingly, we budget conservatively, and often end the fiscal year with a surplus relative to the budget.

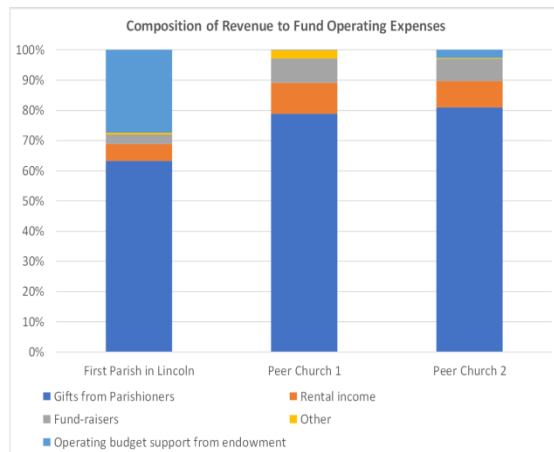
We have highly dedicated and skilled congregational volunteers participating in the lengthy, iterative, and robust budget-creating process that includes input from every committee, Treasurer, Finance Committee, and Parish Committee. Robust budgeting processes exist for both the operating budget and the capital (facilities) budget.

Similarly, the Outreach Committee has extensive and thorough evaluation processes for administering funds to charitable organizations that align with our Call to Ministry and Covenant. An impressive amount of time is spent by this committee vetting the organizations that receive our charitable contributions.

The Facilities Committee has been a small group over the years, but they have done a good job of keeping our historic buildings in good condition. Refurbishments completed over the last several years have put our physical plant, for the most part, on solid footing.

Our largest expense, by far, is staff compensation. It is concerning, therefore, that we have not had a functioning Personnel Committee in some time. Such a committee would help ensure that staff compensation is competitive. As importantly, it would ensure consistency and best practices in hiring and management. Our staff are critical to the success of FPL and we have not done a good job with this important asset.

As mentioned previously, the Parish Committee has managed expenses well. However, revenue-generation activities have not received the same level of attention from the Parish Committee. Finding ways to increase our membership should be a major focus. In addition, our peer-church benchmarking shows that other churches are more successful in generating revenue from fund-raisers and rental income. It should be noted that the chart below is somewhat misleading, in that we do not use our May Market revenue to fund operating expenses (and thus they are not shown here), but even if May Market revenue were included here, our revenue from rent and fund-raisers is light.



The Treasurer regularly updates the Parish Committee on financial matters. However, the PC spends relatively little time on financial matters. This is understandable given that the committee meets for 20–30 hours per year and must spread its time over a wide range of important activities. The church relies heavily on the Treasurer for financial management.

Historically, there has been little oversight of our investments by the Parish Committee, and different Treasurers have had varying levels of involvement with the investments. The recently appointed

Finance Committee, created by the Parish Committee to support the Treasurer, should be able to provide more consistent oversight of our investment manager.

Risk

We reviewed our property and liability insurance policy and met with our insurance agent. The agent seemed to be quite knowledgeable about the unique risks that churches face. We are convinced that we are adequately insured against foreseeable property damage and liability risks.

Processes exist that should limit the possibility of fraud and embezzlement. These include appointment of well-known and trusted members of the congregation as officers, division of responsibility between those creating the checks and those signing the checks, and multiple sets of eyes on the bank statements. The church should be diligent in ensuring that the safeguards that are in place are used.

The process for collecting and counting the Sunday plate donations has some risk, but the dollars are small and embezzlement would be noticed if it were substantial. Security of the process could be improved by bringing a second usher or deacon into the counting process.

SEC oversight of our investment-management provider should help guard against fraud with our investments. Having independent statements or web access to our accounts at the investment manager's custodian would improve account security.

There are other plausible risks related to our investments. One is underperformance that could result from poor investment decisions. It is impossible to know in advance whether an investment manager will perform well. However, we have reduced the risk of gross negligence or incompetence with our investments by outsourcing investment management to an experienced and professional firm that is subject to competitive forces. Our new Finance Committee will be monitoring investment performance and will be prepared to make a change should we lose confidence in the investment-management firm.

Another investment-related risk has to do with selection of an asset-allocation target that is either too aggressive or too timid. We do have a written investment policy, and the investment manager is managing our account in a manner consistent with the investment policy. The asset-

allocation range called for in the investment policy appears to be in line with norms for church endowments, though it is a broad range. We could increase confidence in our asset allocation by undertaking an explicit examination of our appetite and need for stock-market risk as part of a long-range financial plan (which we do not have and from which we would benefit).

The church has improved its financial reporting over the last few years. This has made it easier to respond to requests for information from members. At times, members' expectations for more rigorous financial management have outstripped what is realistic in a volunteer organization with a small paid staff. Regularly publishing a standard set of reports would reduce ad hoc requests and would likely reduce any concerns about "transparency."

People Resources

It's difficult to know whether the Parish Administrator has sufficient time to work on financial matters. Financial tasks are getting done, but we also observe the Administrator working long hours. Having the outsourced bookkeeper (who specializes in working with churches and with our accounting software) seems to be working well.

The Treasurer's job is a very big one. The Treasurer leads, is a major contributor to, or manages a broad range of important church activities, including the following: leading the budget process; setting stewardship targets; presenting the budget and financial updates to the congregation at Annual Meeting and at other times during the year; determining staff-compensation levels; overseeing spending and ensuring that individual expenditures are in line with budgets; reviewing invoice payments and signing checks; tracking stewardship progress and estimating the final amount for use in the budget; providing financial support for tenant space negotiations; financial reporting; working with the Finance Committee to oversee investing activities; collecting pledge payments (including reminder statements); collecting and depositing Sunday plate revenues; generating tax receipts to donors; answering parishioner questions and performing ad hoc analyses.

Undeniably, we have had difficulty recruiting parishioners to take on the job of Treasurer. By its nature, the job is a big one and requires a multi-year commitment. It is thought that having a Finance Committee will help somewhat; having a Personnel Committee could also take a few things off the plate of the Treasurer.

✂

Worship and Spiritual Life:

Liz Wilkinson and Joan Mansfield

This team reviewed FPL's current worship and spiritual-life offerings, its religious-education offerings and curriculum, and the Discernment 2014 and Vision 20/20 documents. Religious Education programs at four area churches were compared to that at First Parish. The current and a previous RE directors at FPL were interviewed, as were the Deacons, the Youth Programs Committee, Choir, and the Ministerial Intern. Group discussions were held with the Meditation group, four open congregational groups, and three Open Meetings.

Audit

1. Spiritual life is led by the ministers (Senior and Intern) and nine deacons who provide leadership for the worship service and prayers and share responsibility for the spiritual direction of the church.
2. The RE program is led by a paid RE director from the congregation as of January 2018. The Youth Programs Committee has seven members. Classes are led by adult volunteers. The 8th-grade OWL program is led by two paid religious professionals. There are 47 children registered in the RE program and 36 have participated this year. At times there are as few as 12 children who are actively engaged. There is free childcare for children under age five during the service.
3. The music program is led by a professional organist and conductor. There are 26 members of the choir. The Handbell Choir practices weekly at FPL and provides music for three services each year. The Music Committee supports these activities plus 3 concerts for the larger community of Lincoln and neighboring towns with professional musicians and outside choirs.
4. The Outreach Committee identifies charitable organizations that the church will support and supports on-the-ground Faith in Action Task Groups.
5. The Hospitality Committee, Flower Committee, Care Committee (pastoral care), and Membership Committee all support spiritual life at the church.
6. Small Groups, including a variety of affinity groups, as well as Meditation, Environmental Concerns, and a number of other small groups meet regularly around a variety of themes.
7. Adult education is often led by the Ministerial Intern and includes workshops on a theme of his/her choice. A committee is now working on expanding adult education for next year.

Observations

1. This is a strong and deeply connected community with generally shared values.
 - a. People value spiritual depth and authentic, original thought in sermons and the service.
 - b. People feel safe to share personal struggles, and find that when they are in need, the community is there to support them.
 - c. This is a close community and can feel off-putting to outsiders, who feel it is hard to become part of the group.
 - d. The congregation has aged as a whole over the past 20 years with fewer families with young children than in the past.
2. The church values its independence and its tradition of not belonging to any one denomination.
 - a. People draw spiritual strength from a background of many different religious traditions and want to learn from other traditions and religious practices.
 - b. People value the non-dogmatic, non-liturgical approach to worship. Many people like the current structure of the service which has evolved to its' current fixed form over the past 20 years.

- c. The ministers would like more flexibility to change and vary the current structure of the service.
- d. People value intellectually rigorous and spiritually challenging sermons.
- e. People feel it is important for the church community to feel inclusive, diverse, honest, and emotionally safe.

3. The simple beauty of the Sanctuary as a spiritual space is highly appreciated. In addition, the new Stearns room offers a space that would support adult-education and other programs that would be attractive to a wider audience/the larger community.

4. The congregation highly values the music in the service (choir, organist, bell choir). Some people would like to see less-traditional types of music; some would like a selection of shared singing beyond the two hymnals; some would enjoy teen musicians, different instruments, soloists from the congregation, etc.

5. The religious education program is critical to the future of the church. The RE program has been moving in a new and positive direction in the last few months under strong new leadership. It is smaller than in the past, however, so it's very important that both RE and the church services themselves encourage families with children to become active in the church.

6. The Small Groups rewardingly engage many members, but they appear mysterious or are actually closed to newcomers. A number of people find their Small Groups to be a very meaningful part of belonging to First Parish. Unlike churches that reset Small Groups each year, several of ours have been meeting together, in the same constellation, for many years. Entering these groups is difficult more often than not: many potential members have said they have been turned away or discouraged from entering this experience.

7. The Sunday sermons are greatly appreciated by many who find them engaging, challenging, and stimulating; members report leaving church with a desire to improve their lives and their relationships. Others who do not share this enthusiasm remain away from Sunday worship.

8. Some parishioners find their connection to the church in ways other than the Sunday services, such as participating in choir or bell choir, Meditation and other groups, community-service activities, compassionate-care work, and special fund-raising and community projects such as May Market and Touch of Christmas Fair. All strengthen connections to the community.

Peer Comparisons

In looking on our own website as compared with those of our peer congregations, we searched principally for child, youth, and adult religious education. The information on many other churches' websites is significantly more comprehensive and descriptive than ours. First Parish in Wayland and the Follen Church in Lexington serve as two very good examples.

First Parish in Wayland. This website describes RE as Spiritual and Ethical Education for children, youth, and adults. Comprehensive program descriptions include the following:

- *SEEK* (Spiritual & Ethical Exploration for Kids), with program descriptions for all ages;
- *OWL*, including links to the UUA site, books used, and their content;
- *Classes/activities* for specific age groups on Friday evenings, Sunday mornings/early afternoon, and Sunday evenings;
- *Social Action* and *Welcoming Congregation* tabs clearly establish the parish's priorities;
- *Stay Connected* tab offers a variety of modalities Facebook and a Listserv;
- *Adult education* is addressed under the Spiritual and Ethical Exploration tab, and lists adult activities but is not as expansive as other pages.

Follen Church, in Lexington. This website includes the following information:

- "Follen Responds to Racism," incorporated into the RE curricula for all ages;
- Welcoming acknowledgment of children with special needs;
- Youth and Junior choirs;
- Sunday-evening groups for high-school and middle-school students;
- Community & Hospitality Action Team, supporting/coordinating adult offerings;
- Opportunities for children & youth to participate in fundraising and service work;
- "Food for Thought," a monthly free dinner program providing childcare and offering group discussion on spiritual growth and community engagement.

Recommendations from this subcommittee

1. Design and build the organizational structure to provide support for one another and for our professional staff, so that the ministers and RE director can be successful leaders.

a. Communication between the religious leaders and the community should be supported in a way that will protect the minister's time while providing a mechanism for hearing grievances and addressing individual concerns and suggestions. A dedicated small team of people who are available to hear concerns/ideas and triage, follow through, and take action to address these concerns with the ministers or appropriate committees would be one approach to this.

b. Continued support of individual spiritual needs and pastoral care, both by the recently established Care Committee and by the ministers, should be encouraged wherever possible.

c. We would do well to have a mechanism in place for communication among all the various committees, to prevent silos (isolation of a committee's efforts from the others). A "Committees' Council" of leaders or representatives from each standing committee could enhance committees' communication with and understanding of one another.

2. Support inclusivity, diversity of thought, and expression of different perspectives in our worship services and in all activities and programs.

a. Specifically, wholeheartedly, and actively provide for inclusivity for everyone.

b. Explore ways for incompatible perspectives to be heard and respected.

3. Continue to look at the structure of our service, being open to new thinking while keeping hold of what we value.

a. Continue participation by parishioners in the church service.

b. Encourage intellectual rigor and spiritual challenge in the pulpit, supporting parishioners' spiritual inquiry and growth and including a rich variety of material.

c. Encourage the use of guest ministers or appropriate lay people in the pulpit.

d. Include intergenerational services on a regular basis (perhaps every four to five weeks), perhaps varied in structure, with different types of music and readings; children would be encouraged to come to the Stearns Room after the service for drinks and snacks.

4. Enhance or create new programing that will attract families with children, through RE, youth programs, young-adult projects, and family-based learning opportunities or justice work.

a. Support the RE program with a larger number of adult volunteer teachers.

b. Strengthen the RE curriculum to offer unique spiritual-growth experience for our children. This might include youth programming at times other than Sunday mornings, or teen programs to do community-service activities with an engaging leader. The new RE director is working hard on this.

c. Offer the Youth Programs Committee strong support and guidance from the minister.

5. Create mechanisms to make our church more widely known in our own community and in neighboring communities.

a. Develop a strong and specific identity in the community so that FPL is known as “standing for something” that engages our core values and our Covenant.

b. Create and maintain an engaging and comprehensive website, along with other social-media approaches, and develop a more easily readable *Parish News*.

c. Provide group activities for families and adults such as lectures or courses, films and activities with discussions, as a way for new people to find us. There is an Adult RE committee actively working on a program of speakers for next year.

6. Create a Pastor/Parish team to offer information and support to the Interim and new Senior Minister. A small team of just two or three parishioners could provide ongoing support and constructive feedback to the minister.

7. Utilize guest or visiting ministers occasionally, or even a lay preacher.

8. Unite the Membership Committee with a much larger effort to devise programs and opportunities to attract and engage new people. First Parish needs to invest more diligently in creating a welcoming environment.

a. Find out the interests and talents of new people, in order to offer them engagement in the service and community, involvement in church-sponsored community service, and participation in educational or spiritual groups that might appeal to them.

b. Invite individual new parishioners to volunteer in specific activities; encourage and enable them to integrate smoothly into the community.

c. Provide information on how our Small Groups work. While several of them are strong affinity groups and prefer to remain static in their membership, others are more open and can happily include new members. New Small Groups can be created as well. This information could be included on the website or in the newsletter, as Small Groups can be a highly valued aspect of our community.

Organizational Structure and Governance *Mimsy Beckwith, Dan Boynton, Erika Heilman*

Audit

In gathering data about our own church structure and organization, we were not short of material: we reviewed our Bylaws, read our Annual Reports from 1996 forward, and generally mined our pertinent archived materials; we also met with the Parish Administrator and DRE for their knowledge and input, attended listening sessions with the standing committees, and solicited lay leaders' and members' thoughts all along the way. After making some outward inquiries, we were also graciously invited to view the organizational and governance profiles of a couple very healthy peer churches in our area, to see how they do things—worship, lead, teach, raise money; these visits rendered a profitable view of some best practices that we could conceivably learn from and consider for ourselves.

Finding Useful “Peer Communities”

Within the Greater Boston and Metro West areas, we identified several communities that were likely to be useful comparators to ours. At a finer, civic level, we found closely comparable communities in Wayland and Lexington, including demographics that are comparable in extremely close proportion. In the chart below, note:

- (i) a tight ratio of 1:2:5 in our three towns' general populations and numbers of housing units; 1:3:6 in numbers of churches/temples/synagogues;
- (ii) nearly identical percentages of K-8 children *and* residents over 65yo;
- (iii) very high mean household incomes, and within just a few thousand dollars of one another.

Town data [2016, U.S. Census Bureau]	Lincoln	Wayland	Lexington
<i>[Note approx. ratios]</i>	<i>[1] :</i>	<i>[2] :</i>	<i>[5]</i>
Population	6,651	13,544	32,936
Housing units	2,564	5,287	12,161
Houses of worship	3	9	19
Percentage of pop. K–8 th gr	15.5%	15.3%	15.6%
Percentage of pop. >65yo	16.5%	18.5 %	18.0 %
Mean household income	\$195,926	\$199,541	\$197,029

Finding Useful “Peer Churches”

Looking for some healthy comparators in Wayland and Lexington, then, we hoped to find both UCC and UUA churches with whom to work. The numbers narrowed when only a handful of our likely comparators were amenable to sharing deep data with us. And within that handful, numbers diminished further when the UCC churches were effectively disqualified: though they were high-functioning and extremely healthy churches, their organization and governance are structured, legally and foundationally, according to a uniform statement of faith—which could not have been useful to us as a dual-denominational verging on pan-denominational church.

So: looking at the several UU churches in these communities, we focused on the First Parish in Wayland and Follen Church, in Lexington.

In the chart below, the gross data from our three churches seem, at first, not to correlate in any interesting ways. A few evident markers are:

- (i) we each employ a small core of fulltime staff,
- (ii) we each hire more extensively in part-time positions, and
- (iii) where our membership numbers vary, our actual attendance figures are all in the 110–150 range.

Church data	First Parish in Lincoln	First Parish in Wayland	Follen Church [Lexington]
Full-time staff	3	2	5
Part-time staff	9	8	11
Members	319	282	340
Attendance (av.)	110	110	148

As it turns out, these simple data points are actually very real and significant markers. In the eyes of the people and institutions who study church organization for a living, these traits of ours render us not only “recognizable,” but “identifiable”—as churches at the tipping point of change.

The Alban Institute, at Duke Divinity School, is an educational and consulting practice (with publishing house) that exists to engage church leaders in sharing their practical wisdom, principally by gathering and disseminating “new ways of enabling congregational leaders to be agents of grace and transformation”; it’s been doing this for over 40 years. According to Alban, our church, as well as our two peers, fall squarely in the category of a “church in transition.”

Churches that are “clinically” in transition include those that are (i) hiring at precisely the same levels that we are, (ii) utilizing a battalion of volunteers to operationalize their programs, as we are; and (iii) approaching the critical attendance figure of 150, as we are.

Significantly, there is another, crucially important marker that all three of our churches are also hitting: our “transition” is recognizably a transition of identity. The explanation is this: We each began as historic churches, having put down roots several centuries ago; back then we were decidedly pastoral-centered churches, with a notably educated minister and a local, somewhat homogenous flock. Over time we all grew. Then we grew some more. Over the centuries we all

acquired more diverse, more engaged, and eventually more education-, program- , and service-oriented identities. We were transitioning in our identities.

The Alban Institute, in its discovery and understanding of thousands of churches across the country, knows a lot about such transitions of identity, and recognizes five markers of change that are completely in plain view:

Five “Moments of Truth” for congregations

Organizationally, functionally, and spiritually, a congregation is approaching a significant growth/transition point when it —

- ❖ approaches threshold attendance numbers of 50, **150**, or 400;
- ❖ has had a vote to approve a significant capital project or improvement;
- ❖ has discussed increasing staff;
- ❖ has instituted additional programming;
- ❖ has had to add multiple and/or alternative services on certain occasions or holidays.

Apparently, and perhaps not surprisingly, we and our two peers are already engaged in this transition of identity. We’ve all hit many of these markers, announcing our preparedness for change, even as each of us accomplishes them in our own way and in our own time:

<i>“Moments of Truth”= signposts toward growth</i>	Lincoln	Wayland	Follen
Approaching 150 attendance			✓
Approved a significant capital project	✓		✓
Discussed increasing staff	✓	✓	
Discussed additional programming	✓	✓	
Added alternative/ multiple services	✓	✓	✓

There is, we discovered, *extensive* professional literature on this matter of transition of identity—its process and its pitfalls. It’s good for us to know we are in ample company; when a church like ours approaches a transition period with uncertainty or even anxiety, it’s good to know we are in a *NOT-unusual, NOT-unhealthy* situation. Where we may be susceptible to disarray and frustration, we are still tending to the intentional growth and cultivation of an engaged congregation, and we are already preparing the way in real and necessary measure. This is *never* simple work, apparently, not for anyone. But religious professionals recognize us in this process, recognize us with clarity, reassurance, and even joy, for we are going through valuable and

important growth. And since we're doing it together, thoughtfully and advisedly, we're very likely to succeed.

Incidentally: lending itself very much to our efforts is the battalion of volunteers who are committed to operationalizing our every initiative and program. We have 19 standing committees that perform the business and operations of our church, and those committees are populated with 174 positions. Just over 100 people occupy those positions; that is, many many members are doubling and tripling up on their commitment to us. Here's a list of those whom we can easily count—and there are more folks where these came from:

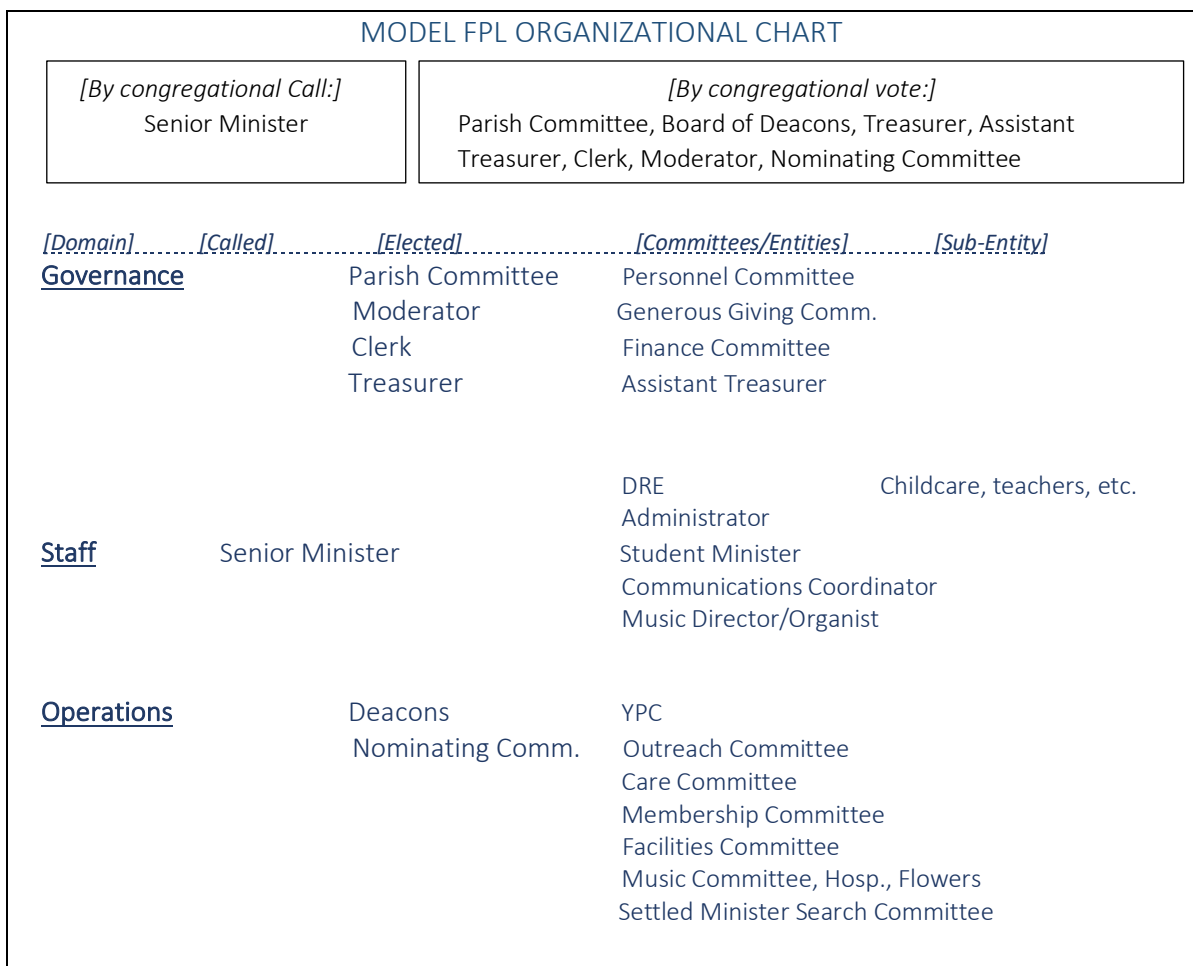
Lay Leadership/Volunteers							
Kim	Buell	Sarah	Bishop	Ben	Wells	Anna	Bishop
Kathy	Huber	Pilar	Doughty	Becca	Fasciano	Sue	Stason
Shar.	Keenan	Jason	Packineau	Laura	Regrut	R.L.	Smith
Gina	Halsted	Jessica	Packineau	Tucker	Smith	Sue	Stason
Diana	Smith	Kem.	Taschioglou	Denise	Bienfang	Nanc	Henderson
Steve	Brand	Hann.	Stevenson	Gabri.	Brennikm.	Mims	Beckwith
Mary	Gaylord	Ann	Yos	Nancy	Fleming	Barb.	Sampson
Chris	Hamilton	Rick	Mandelkorn	Karin	Levy	Sarah	Andrysiak
Tom	Haslett	Kim	Buell	Nick	Covino	Mim.	Beckwith
Joan	Kimball	Deann	Johnson	Mimsy	Beckwith	Mary	Briggs
Dean	Laferriere	Karin	Levy	Dan	Boynton	Tim	Moynihan
Tom	Risser	Joan	Mansfield	Jillian	Darling	Nick	Covino
Paula	Waterman	Tom	Risser	Joan	Mansfield	Becca	Fasciano
Ben	Wells	Sue	Cornwall	Joe	Robbat	Rob	Graves
Sarah	Bishop	Tom	DeNorman.	Liz	Wilkinson	Steve	Johnson
Alexis	Jette	Kathy	Huber	Chris	Andrysiak	MH	Lorenz
Ab.	Adams	Shar.	Keenan	Jeani	Welsh	Edie	Mackie
Barb.	Sampson	Sandra	Grindlay	Tim	Moynihan	R.L.	Smith
R.L.	Smith	R.L.	Smith	R.L.	Smith	Jeani	Welsh
Sarah	Andrysiak	Susan	Taylor	Nick	Covino	Ray	Shepard
Nick	Covino	Tim	Aarset	Joan	Mansfield	Tim	Aarset
Gary	Taylor	Linn	Parrish Elmes	Mary	Briggs	Larry	Buell
David	Elmes	Jennie	Morris	Diana	Smith	Melis.	Brooks
Doug	Crosby	Lucy	Sachs	Nancy	Henderson	Jillian	Darling
Chris	Andrysiak	Tucker	Smith	Paula	Waterman	Bill	Stason
Joe	Robbat	Mary	Stechschulte	Tim	Moynihan	Susan	Taylor
Gary	Taylor	Eliz.	Kelly	Teach.	18 memb	Tom	Walker
Larry	Buell	Choir	22 members	FIATs	16 memb	Eliz.	Kelly
Jillian	Darling	174 positions occupied by 101 people					
Katy	Walker						

Modernizing our organization

Whenever a church like ours enters a period of change, we are well-advised to make our changes “largely with the significant materials at hand: your Bylaws, your cultural skills and toolkits, and—most importantly—the durable values of your Covenant.” [Alban.] This is surely good advice.

touchy process. First Parish in Wayland, on the other hand (whose Bylaws resemble ours in many essential elements), is managing its significant growth and programmatic expansions entirely within the language and intent of its Bylaws. This seems an advisable route for us too.

Borrowing the graphical device of Wayland’s Org Chart, then, we devised a model FPL Org Chart. Note that several high-functioning committees are here redeployed *out* of the Parish Committee’s domain, as Parish Committee right now is “holding” way too much business that is not its own, and needs to return to its proper work of policy and oversight. Note too the insertion of a few new entities, because we need them immediately (Personnel and Search Committees). Importantly, “lines of reporting” are not and will not be proposed by this Team.



First Parish in Wayland and Follen Church have substantial populations of children enrolled in a school directly on church premises or immediately adjacent that may contribute to church RE enrollment and to parent engagement in church life.

RE data	First Parish in Lincoln	First Parish in Wayland	Follen Church [Lexington]
RE enrollment	47	75	142
Association with feeder school, possible RE registrants	Magic Garden Infant & Nursery Care, onsite: 0	Wayland Creative Preschool, 3–5yo, onsite: 56	Waldorf School, K–8, next door, shared outdoor space: 230

Communications and Membership

Our examination of how First Parish handles its communications has included: interviews with parishioners regarding the many ways in which our members and friends communicate with one another, and an assessment of the gaps in communication that currently exist; an analysis of our printed and web-based media; and a comparison of our present communications methods with those of eight similar-sized churches in the Metro West area: Follen Church in Lexington (UUA), Second Church in West Newton (UCC), First Parish in Wayland (UUA), Pilgrim Church in Sherborn (UCC), Centre Church in Lynnfield (UCC), First Congregational Church in Rutland (UCC), First Parish in Bedford (UUA), and First Parish in Needham (UUA).

Despite our church's multiple means of communicating information to its members, a complaint that is sometimes heard is that "the left hand doesn't know that the right hand is doing." Some parishioners have the impression our church community is operating in "silos," such that members of one group are not aware of what another group is doing. Efforts to improve these communication gaps may require more face-to-face contact, better technology, and greater attention to the content of the messages we send out.

Interpersonal communication

Fewer than 100 parishioners regularly attend Sunday church services, and not all of those proceed to the Stearns Room after the service for coffee hour and socializing. Aside from that occasion, however, there is limited opportunity for face-to-face conversation with many members of the church. Committee members, too, need to have a formal mechanism of informing one another of their activities, needs, and concerns, preferably in a forum where there can be active dialogue. This issue is addressed elsewhere in this SMR report.

In the past, when nearly all communication was handled in face-to-face or telephone conversations, there was a very small chance of significant misunderstanding. But now that most communication is done via text or email, messages may be written in a manner that can be perceived (not intended) as unclear, unfair, or disrespectful. Even though this is never the intention, the result may be confusion or hurt feelings. When dealing with sensitive subjects, staff and parishioners need to make a special effort to communicate face-to-face, to avoid even potential misunderstandings.

Print communication

Before the age of the Internet, our church mailed out the printed *Parish News* to everyone on the mailing list. More recently, acknowledging the high cost of printing and mailing this publication, we decided to limit the mailing of the printed *News* and send it only to those who did not have Internet access; all others were sent via email. About 35 parishioners currently receive their *Parish News* in the mail. Many of these recipients report that they read every single article and appreciate having this connection to the church and all the memories of the years they spent there.

About 25 paper copies of the *Parish News* are also placed on the table in the Narthex, and another 25 are placed in the entryway of the Parish House. In addition, announcements and schedules are inserted into the Order of Service.

Internet-based communications

The monthly *Parish News* is currently being sent to an email list of 410 persons. Recipients download the PDF document, which can be awkward for reading on some devices, especially where articles are continued on another page. A computer-friendly format would automatically adjust the layout and type size to fit whatever screen you're reading on, but PDF files are not sufficiently versatile and can render the *News* virtually unreadable on some devices. According to Google statistics, 43% of our readers open First Parish documents on their cellphones—which means that almost half the people on our 410-person mailing list are able to read only the largest headlines in the *Parish News*.

The *Weekly News* is formatted to be read on any type of device. Perhaps as a result, this is the most widely read church publication: an average of 198 people view the *Weekly News* each week—that's 48% of the mailing list. The industry average for religious organizations has only 25.8% of persons on a mailing list opening their electronic news documents, so our *Weekly News* is read at about twice the national average.

Recently, our church has put the *Weekly News* format to good use in announcing the progress of our Interim Minister search—an important communication. The same technique could be used going forward to post any mid-week news about a variety of important subjects, including Parish Committee and Deacons meetings.

External communications

In recent months, we have been making a greater effort to let the public know about FPL events. Nonetheless, where it has long been a priority to attract new members and especially more young families, we do not have an organized marketing campaign specifically focused on this population. Here is what we are currently doing to attract visitors:

FPL website. We have a much-improved website. However, it depicts a church that has old New England traditions and an elderly population. If we want to attract young families, we need to add comprehensive information on religious education and fill the website with photos of happy children engaged in various activities.

Print-media notices. The *Lincoln Journal* includes a description of FPL services under its "Worship Briefs," which is printed on the final page of the first section.

Web-based notices. Announcements of special events are frequently included in the *Lincoln Squirrel* and *Lincoln Talk*.

Facebook. First Parish has a Facebook page and it is being kept up to date better than before. But there is no evidence that a regular dialogue is taking place via Facebook.

Membership

The single top priority for our church is to bring in more members, particularly new families. Until recently, the Membership Committee has considered its mission to be the welcoming of potential new members who show up at church services, and supporting current members with the goal of increasing their level of engagement. The Membership Committee has not yet taken on the role of proactively attracting, cultivating, and developing new parishioners, whether from Lincoln or from surrounding towns.

A key question is, “How great an effort will we make to engage new members?” If we decide we want to make the greatest possible effort to accomplish this goal, all of our church leaders will need to contribute to this effort, from many different angles. This means RE, Outreach, Communications, and Deacons, in addition to the Membership Committee.

Here is what Membership Committee members are currently accomplishing:

- Together with the Deacons and ushers, they welcome visitors who show up to attend Sunday and other worship services.
- They invite visitors to the Coffee Hour after the service and make sure the newcomer meets and engages with other parishioners.
- They provide names of newcomers [who submit completed pew cards] to the Communications Coordinator, who sends to those individuals (i) a welcome letter and (ii) a brief questionnaire about interests and prospective involvement in the church.
- They respond to questions regarding the personal experience of membership, any questions about commitment or stewardship expectations, and other questions appropriately answered by a parishioner (as opposed to staff).
- They work with the Minister and Communications Coordinator to plan events such as a welcome coffee, opportunities to meet the minister and church leaders; open houses, etc.

All of this effort has been very helpful, but it is premised on someone’s walking through our door in the first place. How many other things could we do that would actively attract and develop membership? Do we have the time, motivation, and tools to accomplish this task?

In years past, many of our members had partnerships with (or positions on) community organizations and boards, and incidentally lent exposure to First Parish activities. The Membership Committee intends to explore the reinvention of this one-off welcoming activity:

- Collaborative activities with the Lincoln Family Association, Codman Farm, the Lincoln Public Library and especially the Children’s Division;
- Sponsoring interest-based groups such as a “Cherish the Living Earth Walking Group” that would meet before church on Sundays. (We have a new First Parish softball team!)
- Taking advantage of the considerable community attendance at the “Live in Lincoln Center” concerts to invite people to hear the music on Sunday mornings.

How other churches recruit new members

Monthly dinners. Follen Church offers a monthly dinner program called “Food for Thought,” at which dinner and dessert are served, childcare is free, and a program of large- and small-group

discussions is held; attendance is open and no RSVP is required. The charge is \$10 per person with a maximum of \$20 for a family. Recent programs have included: “Stories from a Civil Rights Pilgrimage” (January 2018); “Just Listening and Beginner’s Mind” (on meditation) (February 2018); “Faith Journeys,” at which a former Catholic, Jew, and Muslim told the story of their upbringing and conversion to Unitarianism (March 2018); “Social Class” (members shared their experiences growing up in the welfare class, middle class, and upper class) (April 2018). These Food for Thought programs attract people who are not normally Sunday churchgoers.

Colored coffee cups. Many churches offer a brightly colored coffee cup to their visitors, thus inviting regular members to greet and engage with them.

Visiting newcomers. The UUA reports that when a church member visits a newcomer within 72 hours of his/her first visit to the church, the chances of a return appearance increase by more than 50%. Back in the 1970s, anyone who showed up at church was visited in the next day or two by a senior member of the parish and given a welcoming packet. It was not an unusual gesture in those days, but it may not be practical (or even welcome) today.

Welcoming table. Most other churches we visited have some sort of informational table wherever their after-church coffee hour is sited. Even an unmanned “Welcoming Table” in our Stearns Room would seem a very good idea, with a variety of free material about First Parish, information about church services, church history, our Covenant and Call to Ministry, RE, YPC, and childcare, Outreach activities, and the current *Parish News*.

Stick-on nametags. It’s a very nice gesture to provide stick-on nametags that have the same church logo as all the regular nametags, with a space to write in your own name. It’s a much more inclusive gesture than offering a blank or “My Name Is” nametag! They could be set out right on the Narthex table, along with a pen, and visitors would be encouraged to use them.



Some summary remarks and Next Steps

Nick Covino

A few key findings stand out in this review. This is a congregation with many strengths that values their community. The Financial situation of First Parish in Lincoln is sound with responsible budgeting, management, and \$2m in assets to buffer difficult times. However, the health of the church relies too heavily on Annual Giving from a diminishing pool of givers. While an increase in giving from current members, this year, allowed for a modest draw from the investment accounts, an increase in membership is really required for future financial health. Renewed engagement in the needs and issues of the greater Lincoln community and family-friendly programs are central to the ability of the Parish to attract new members. The church has many volunteers and members with considerable fondness for the community, but it also has difficulty with communication and reconciliation of differences. Both the governance and communication structure of the church need an overhaul. The following points elaborate upon these ideas and point to some next steps.

1. The membership of First Parish in Lincoln loves its church.

Even those who have currently withdrawn from active participation view First Parish as their spiritual and relational ‘home.’ Parishioners report that the physical space is beautiful, especially with the renovation, and that it invites quiet reflection and inspires communal prayer. Almost universally, the members expressed the importance of the Sunday Worship and the opportunity to gather with friends and neighbors. Where some desire a greater selection of hymns, the strength of the musical program with the talent of the organist and the capability of the choir are highly valued. This congregation places high priority on the acceptance of a variety of religious traditions and the opportunity to learn from them. There is lively debate about the desirable percentage of attention to be given to UUA and UCC themes, but doctrinal differences that form First Parish are respected and appreciated.

Many of those who have been members of First Parish for decades value the social aspect of belonging to the congregation. Members are friends with whom they have raised children, experienced life events and shared recreational activities. Sunday service is an opportunity to socialize with these friends and membership allows an accessible group to share interests and values. Those with an interest in social service and the environment, for example, find peers and supporters in the Outreach Committee, the weekly meditation group and the Choir provide the same for people with those interests.

Most congregants spoke of the central importance to them of the Sunday worship service. They look for an opportunity to connect. While there is a wish for greater brevity, the announcements and spoken prayers provide important information about people whom the congregation cares about. Again, although some wish for a greater breadth of hymns and instrumentation, parishioners feel moved by the musical program. The pastor’s sermons are a critical element of the morning service. Members wish to be educated and inspired to apply the morning’s lesson to improve their life. The commitment to care for the sick and the effort to bring compassionate care to those who have lost a loved one are held of equal value by both the recipients and parishioners who want their church to be such a caring community.

There are many rewarding affinity opportunities at First Parish and the community has a great number of volunteers who are engaged in the life of the church. The significant number who belong to the Meditation Group and the Small Groups value the affiliation and the possibility that these resources offer for personal and spiritual growth very much. People describe these groups like small communities of trust, support and inspiration within the parish. Likewise, the Outreach Committee, Choir, Care and other activities provide a rich and rewarding source of satisfaction to members. Many note the kindnesses and practical assistance that their families have received from the congregation during times of distress. Dinners for Seven and activities such as the Lenten Book and Cookbook offer occasions for creative engagement.

A considerable amount of curriculum development and program planning has been done by the YPC without much assistance, direction or resources from the staff, until recently. This type of generous community engagement has many expressions in First Parish. The interviews with existing parish groups were noteworthy for the joy that each member seemed to have in

belonging to them. Occasional lectures and musical programs provide welcome social opportunities, especially for those who have been members for some time.

There are valued relationships and opportunities for spiritual and social connection, action and growth at First Parish that are highly prized by its members. This is an unusually rich resource to build upon.

2. The First Parish needs to give urgent priority to the addition of new members.

Most mainline Protestant churches have expressed a strong desire to grow membership. It is imperative that this become a priority for First Parish and not just the work of the Membership Committee. The decline in the congregation over several years, its advanced average age, the paucity of recent members, and the few families with young children serve as a real threat to the church's future.

First Parish does not record the age of its members, but inspection of those who attend Sunday service and who are serving on committees suggests an average age of adults in the mid 60's. Over the last two decades (June 1998 - June 2018), 183 members and friends of FPL have died with 106 passing within the most recent decade. New members for that period total 224, but not all of these have remained engaged. "Membership" in First Parish can be measured variously by the number of attendees at Sunday service (~100), volunteers and active members of groups (~125), regular donor units (~210) or those who are on the mailing list (~303). Financial support is intimately tied to membership and while the (per capita) gift amount has risen in recent years, total giving has declined about 36 % from 2006-2017. With renewed interest and activity in Generous Giving, this number has improved more than 20% over this year, but it is not sustainable without new, younger, members who will make First Parish their spiritual home.

Currently, there are about 27 children registered in the RE program with 20 students attending classes on a regular basis. During January and February, of this year, 12 children were regularly engaged. Last year, the full-time Director of RE was replaced by a part-time Coordinator with volunteer parents assuming teaching responsibilities (many first-time) with few academic resources available to them. A committed group of parishioners have been laboring to rebuild the youth programs and a creative DRE recently assumed responsibility and she will move to full-time, in the next fiscal year. There is a proposal for Adult Education, but only a few, random programs are currently in place. A mission trip to Arizona was instructive and very moving for those who attended, but there has been only one such program in three years with nothing promised for the future. Families with younger children are eager to have regular intergenerational worship services. Apart from holidays, there was only one such opportunity this year. The budget, the staffing and the programs in this area do not reflected the primacy that most parishioners desire Religious Education to occupy. The shortage of vibrant and interesting programs for children and young people makes it quite difficult to attract new families to First Parish.

The church does not have a significant nor a sustained presence in the social, educational or spiritual life of Lincoln and its surround. There are some, occasional, community programs but our church looks more inward than outward. One senior member stated that: “we need to identify something or two that we really believe in and commit to it.” Said another: “We need to do a few, big, bold, community-based programs to bring people in.” The Outreach Committee supports the work of several local groups with funds and periodic volunteer activities and it hosts an emerging environmental program, but there is much more for the church to do in this area. Worth noting is their report of being cautioned, in the past, to keep a lower profile because not everyone appreciated their work.

Lincoln has struggled for a number of years with a school-building project; the METCO Coordinating Committee is desperate for volunteers; there are close to 2,000 residents at our Hanscom Air Force Base with a number of families with children currently or recently deployed; there is a group seeking to train diversity advocates to address a expressed need in town for tolerance and support; there was a recent discussion about immigration that revealed more work to be done in town; and the Lincoln-Sudbury High School METCO program received criticism in the Boston Globe last summer. First Parish could be very helpful in any or all of these areas. Increased visibility for the church creates an opportunity to attract new parishioners.

Parishes that attract new members offer a robust program of lectures, fun activities, service opportunities, and family worship. They are recognized as invested partners in the community and they attract parishioners by being active civic members. New programs and a sustained investment in an important town initiative or need are required to redirect the face of the church towards the community.

A Programs and Community Engagement Committee, as well as some formal and facilitated time for the parish to reflect upon “What we want to be to Lincoln.” would benefit this work.

There are some wonderful opportunities ‘on the inside’ of First Parish, but these are not evident to visitors and newcomers. The websites of peer churches are alive with pictures of people having fun within their community; our public face is the empty (although picturesque) church building and a several year-old picture of the ministerial installation. Increased investment in digital communications would do a lot to convey some of the fulfilling events and aspects of First Parish life. We have a talented web-designer who needs more support and resources to bring us forward.

The sizeable weekly Meditation group offers an attractive point of entry and welcoming company for those with like interests. However, the highly valued ‘Small Groups’ are a mystery to new members who report even being discouraged from attending some of the longstanding meetings. There is a recent effort to open these up. The parish would benefit from restructuring this resource to actively welcome new members while retaining opportunities to support longstanding relationships. Equally unclear is the path to participation in church governance and service opportunities. The town of Lincoln prizes historical membership and the First Parish, often, presents the same impression. New members are not easily engaged nor socialized into membership. More seriously, both the current minister and one of our long-serving female

pastors report painful difficulty around engaging the congregation and feeling appreciated for their talents. They describe the culture of First Parish as one where they were challenged to “fit in” and where they were expected to accommodate to the parish’s expectations rather than being assimilated and welcomed for their gifts.

Membership growth is a function of intentionally welcoming newcomers, valuing their strengths and actively engaging them in the life of the church. Genuine welcome and inclusion require the congregation to change as it adds new members, not the opposite.

Time and professional training to allow FPL to reflect upon how we welcome and assimilate others would benefit the community’s capacity to attract and support new members.

3. There are divisions and differences within First Parish that need a commitment and skills to be reconciled.

In recent years, First Parish has experienced a number of disruptive challenges: the Stearns Room construction project; Rev. Paine’s departure; the lengthy absence from the sanctuary during renovations; an Interim Minister; Rev. Mishra-Marzetti’s arrival; and Rev. Mishra-Marzetti’s abrupt resignation. There are controversies around the reduction of the Religious Education program, the process that produced it, and the final plan; disagreements about Outreach giving and the use of the endowment; disagreements about the pastor’s leadership, messaging and his departure; and hurt around the storage of the choir bells, among other issues. Regular communication among disconnected parish committees and between the congregation and church leadership is inadequate and this has led to rumor, redundancy, suspicion and a lack of faith in the governing process.

During this evaluation, a number of people commented on divisions that they perceived to be within the community. Many noted the division between those members who appreciated the message and style of the pastor and those who were disappointed by the same ministry. Those seen as disappointed were perceived to be opposed to the pastor, sometimes presuming authority to speak critically to the pastor on behalf of the group. Missteps during the first months of the new ministry were obvious, painful and disappointing to all. There seemed to be less time spent by both pastor and congregation coming to understand both the culture and customs of the church and the assets and intentions of its new pastor. Some attention was paid to an orientation process by the Search Committee and members of the Deacons, but these were, in retrospect, shorter and less comprehensive than needed. The consequences of some of these errors still endure on the part of both pastor and parish who seem to have overgeneralized from them.

Resolving conflicts and correcting missteps between pastor and parish have been difficult and consequential issues. A number of parishioners, several in positions of responsibility, offered to create a small Pastor/Parish Committee to provide support and counsel to him. Unfortunately, all of these offers were ultimately declined. Some people felt that the pastor responded to conflict and feedback in an overly defensive or stubborn manner. However, without formal processes to

field complaints and to support the minister as he considered and responded to these, optimal performance would be difficult.

Some members expressed that their ideas and feelings about other issues (e.g., RE, sermon content, program development, the Stearns Room project) were not heard by church leaders or peers and that decisions seemed to be made with neither attention to due process and nor an effort to educate or to build consensus. Many observed that there was no opportunity to share concerns, resolve differences and reconcile conflicts and that there seemed to be nobody and no place to go to with important issues. The seeming centrifugal tendency in First Parish where members withdraw from active involvement in an effort to avoid conflict or to show disapproval, rather than to negotiate and to discuss disappointments and disagreements further contributed. All of these dynamics were seen as adversely impacting morale, church attendance, committee participation, program support, stewardship, leadership and governance.

In some churches an identified small committee receives and triages such issues and members such as the Deacons become trained to facilitate difficult discussions. Many members used the SMR process with appreciation to discuss some of the hurt and conflict in the congregation, there would be value and opportunity to continue this dialogue with skilled facilitators.

A Pastor/parish committee should not be “optional.” Some parishes use a trusted small committee (sometimes called Shared Ministry) to receive complaints, with the authority and skill to move difficult conversations along. The SMR process offered FPL the opportunity to talk together and this was well-used. The assistance of trained professionals could profitably continue this dialogue, especially during this time of reorientation.

4. It is time to update and reconfigure FPL governance and communications.

This review found a number of opportunities for improvement in First Parish Governance. There are few committees with formal written charges and most of these function as silos with limited authority and responsibility. Many committees are understaffed (e.g., Generous Giving, Finance, Facilities). It was challenging to find current lists of committee members and policies on file in a central place. Key documents and history were often on members’ home computers and not in the church. Committees, other than Finance, are not required to bring their business before the PC in a regular way which lessens both accountability and efficacy. Staff complain about the need to bring “too much” to the Parish Committee for approval and the latter complains of having too many operations issues on the agenda. Staff reviews are not conducted regularly and there is currently no Personnel Committee. Employment decisions and performance management issues are typically made by an ad hoc group and they have included individuals who may become involved in an appeals process (e.g., PC Chair).

The absence of a Personnel Committee creates significant challenges and risks with regard to searching for, selecting, negotiating salary, managing, and evaluating employees. Staff management is uneven in an area that requires consistency and salary adjustments have no regular reviewers. When the senior minister is closely involved in the hiring and managing of

employees, that role can be significantly biased by the success or the struggles of a particular worker; people take sides and the pastor's leadership suffers. The lengthy and involved process of Shared Ministry Review, cannot be undertaken more than every three-five years. Regular feedback around staff performance will be relatively absent, if this is the only vehicle that is employed to offer it.

Three of the stated values of the 20/20 Visioning process (Prioritize Religious Education, Outreach, and Worship) were universally affirmed during the SMR, but they have not been integrated into the planning and governing work of the parish. In fact, in the very year that these priorities were presented, the RE budget and staff were greatly reduced along as was the amount allocated to Outreach giving in the budget. These actions left a number of parishioners, especially, families, YPC and Outreach members quite upset. At one meeting of the PC, the pastor asked what the priorities of the church were and 'what we are working on?' and these weren't clear. Priorities and planning should be an integral and obvious part of church governance. Greater care should be taken to create consensus, support and buy-in for initiatives, lest their efforts fail to find a place in the governance and planning processes of the church.

Everyone speaks of the need for improved and regular communication (digital, written and verbal) so that committees, teams and the congregation are aware and informed. There are wonderful examples of congregations that make great use of interactive websites and social media. Any of these can inform a committee with the power to make improvements in communication. When an effective level of communication is not present, rumor and anxiety find too strong a place in the culture and the governing system of any organization. The church should make communication in its various forms a priority.

Several models exist (e.g., Hotchkiss, 2016) that call for separating 'governance' from 'ministry' and assigning fiduciary responsibility, strategy and operations to the Parish Committee and mission, education and worship to the Deacons and staff. In this model, the Parish Committee looks after the money, property, strategy, policy and people and Deacons and staff look after the worship service, education, programs and community engagement. They join together to plan and they meet regularly for discussion of overlapping issues.

A Task Force to update, align, and empower a new governance model is an essential next step; a committee to develop an improved communication system and Internet presence should be formed; a Personnel Committee is urgently needed.

5. The Pastor

Many pertinent observations on the pastor's performance were captured by the Appreciative Inquiry interviews and placed in context. Due to his decision to leave First Parish towards the end of this evaluation, the SMR team chose to provide feedback directly to the pastor, but not to include it in this report. The team used the organizational and personnel data to suggest that First Parish would be best served by a new pastor who would have the following talents:

Thoughtful, inspiring preaching with a message that motivates self-reflection and behavioral change.

Dedication to the compassionate care of those who are sick, bereaved or in need of spiritual counseling.

Talent and energy to be a resource and to develop programs that can support the spiritual and social life of the First Parish and attract new members. Investment in increasing inclusion and welcome in the church.

Capacity to tolerate conflict and to work with the church to resolve differences. Assist the parish's ability to improve its skills in consensus building, respectful dialogue and conflict resolution.

Ability to work with the congregation to move forward the SMR recommendations on program development, governance restructure.

6. Specific recommendations to the Parish Committee:

- A. Immediately create a Personnel Committee of parishioners who have experience with running a business or organization. This could include one PC liaison member, but it must be composed of others so that the PC can retain its independence.
- B. Appoint a Governance and Communications Task Force to update the church's organizational structure and processes and to create a plan for both internal and external communications.
- C. Create a Programs and Community Engagement Committee to align First Parish more closely with the needs of the greater Lincoln community and to develop attractive opportunities to engage and to integrate new members.
- D. Engage some experienced professionals to continue to facilitate the church-wide dialogue that was begun in the SMR process; to assist it with envisioning new programs and directions to engage the community; and to improve its capacity for welcome and assimilation of new members.

Many members of First Parish, perhaps the majority of the congregation, engaged in this process with openness and real affection for the parish. Members expressed gratitude for the opportunity to discuss these issues and valued the experience of examining their community. Many took the time to express their appreciation for the work of the committee. Thank you for all of this.