



Interim Advisory Committee Report

to the Church Council

University Congregational United Church of Christ
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Presented by

Interim Advisory Committee Members

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EXECUTIVE SUMMARY

In January 2006 Church Council appointed an Interim Ministry Search Committee to identify immediate staffing needs of the church following the departure of Rev. David Shull. In March 2006 the Search Committee recommended these needs be filled by calling an Interim Minister and establishing two interim non-clergy positions, a program assistant for pastoral care, and program assistant for youth Christian education. Additionally, the Search Committee recommended the appointment of an Interim Advisory Committee (IAC) to work with the Interim Minister to guide the interim process. On July 12, 2006, Reverend George K. Meier entered into a Covenant for Interim Ministry with University Congregational United Church of Christ (UCUCC) with the charge of helping this faith community discern its path forward. The IAC was established to support George and to ensure interim goals were identified and met.

IAC activities were organized around the development and completion (or anticipated completion) of six central work products, all of which the IAC considered vital to a successful interim process.

1. Congregational Systems Inventory (completed).
2. Congregational Values Statement (completed).
3. Congregational Identity Statement (completed, additional work recommended).
4. Environmental Realities Survey (completed).
5. Vision Statement (underway; next steps recommended).
6. Staffing Recommendations (underway, next steps recommended).

The IAC recognized that a substantial amount of work had been undertaken in recent years that would provide valuable context and guidance for the task at hand. The IAC researched and drew upon previous church surveys including one in 2000 carried out as part of developing a church profile, a norms forum that was part of a broader discernment process in 2003-2004, the Alban Institute Reports (2003 and 2004), and the 2004-2009 UCUCC Priorities.

Core values of the congregation emerged when the clergy invited worshipers to identify their values (November 2006) and their prayers (January 2007) during sermons. By far, the value most often mentioned was Love, followed by Inclusiveness, Caring, Compassion, and Social Justice.

A UCUCC Identity Statement was developed to provide an unvarnished reflection of who we today. The statement is intended for internal use and we encourage its use as a means to strengthen and take action in areas that need change.

The IAC researched internal and external “environmental realities”. A geographic ‘precept’ study was commissioned for the zip codes, that UCUCC serves (primarily North Seattle), giving us important clues about the world around us. Additionally, George Meier conducted a statistically valid congregational systems analysis. Data was also collected and analyzed from church membership and demographic records and trends.

The importance of having a commonly held church vision has been discussed in a variety of contexts in recent years and was clearly stated in the Alban Institute reports well before the current interim activity. Interim Minister George Meir led the Leadership Team through an extensive discernment process culminating in a draft vision statement that was presented with great passion by Rev. Catherine Foote, Rev. Don Mackenzie, Rev. Peter Ilgenfritz, and Business Administrator David Anderson to Church Council at its June 2007 meeting::

“taking Love, to hard places”

The IAC recommends that the Leadership Team, lay leadership and the congregation fully engage in defining our vision and articulating the many and joyful ways of living out this vision.

In concluding its term and charge, and based upon the substantial work conducted in the above noted interim activities, the IAC makes eight recommendations to the Church Council for consideration and action

University Congregational United Church of Christ has a long history as a progressive, caring Christian community of faith and action. The IAC firmly believe this deeply rooted tradition will continue and that UCUCC has the opportunity and capacity to play an even more vital role in healing the wounds – and spreading the joy – of a troubled and beautiful world.

INTERIM ADVISORY COMMITTEE BACKGROUND

Following the resignation of Reverend David Shull as a pastor at University Congregational United Church of Christ (UCUCC) during January 2006, the Church Council (Council) established an Interim Minister Search Team. At the onset of its interim time, the Council approved the Interim Search Committee’s recommendation to focus on an intentional period of discernment, transition, and transformation. In March 2006 the Search Committee recommended calling an interim minister and recommended the establishment of two additional interim positions – program assistants for Pastoral Care and for Youth Christian Education. They also recommended establishment of an Interim Advisory Committee (IAC) to guide and support the Interim Minister. The Council approved these recommendations. The two program positions were filled during early June 2006 for a period of 18 months.

The Search Committee recommended and the Council approved calling the Reverend George K. Meier to serve as an interim minister. On July 12, 2006, Rev. Meier entered into a Covenant for Interim Ministry with UCUCC. Tasks in the Interim Minister Job Description included helping the UCUCC community discern its path following the departure of Rev. Shull. Toward this goal, specific tasks included:

1. Holding classes or host sessions with members of the congregation on the interim process.

2. Meeting with small groups, boards, and committees to learn about their work and opportunities for growth in this interim period.
3. Working with the Interim Advisor Committee (IAC) to develop and carry out interim activities.
4. Developing and carrying out ways to keep the congregation informed and involved in the interim process, communicating findings and observations along the way.

The IAC was established to guide and support the Interim Minister, ensuring that goals for the interim process were reached. Members of the IAC included Marty Curry, Carol Fleagle, Gene Hill, Joyce Jackson, David McCracken, Susan Ovens, Betty Spieth, Rev. George Meier (Interim Minister), and Rev. Catherine Foote (Clergy Representative). During 2006, Courtney Hashimoto chaired the IAC. Appendix A (separate cover) provides the background and charge given to the IAC. The IAC was charged with the following roles:

1. Provide advice on the overall goals and approach to the interim process – based on individual experience/perspective and connection to the broader congregation.
2. Give periodic assessments of how the process is going, advising on ways to adjust the process to make this an effective effort for the congregation as a whole.
3. Assist and support the Interim and the Leadership Team in carrying out the interim process, encouraging participation by members of the congregation, communicating with boards, committees, and individuals to share information and gather ideas/responses. This will involve helping with specific tasks and events, and/or identifying others to help in specific ways.

IAC Process and Timeline

The IAC interim process and time-line were outlined by the Interim Minister, George Meier, in his February 18, 2007 memorandum to the Committee (see Appendix B, separate cover). A Road Map for accomplishing of the IAC charge is provided in Appendix C (separate cover). The requested tasks included:

1. Development of congregational values and identity statements.
 - a. Share the identity statement and be in dialogue with the Leadership Team.
 - b. Bring the identity statement to Council.
 - c. Test and share the identity statement with the congregation.
2. Development of internal and external environmental realities for the church and the community served by the church.
 - a. Be in dialogue with the leadership team about the environmental realities.
 - b. Understand the congregational systems issues and the implication of the Congregational Systems Inventory.
 - c. Be in dialogue with the leadership team and Council on systems issues and their implications for the church's future.

3. Support of a Leadership Workshop.
4. Support drafting of a church vision by the leadership team and its ownership by the congregation.
5. Ministry mapping or strategic planning after the vision has leadership support.

Over the past year, Rev. Meier and the IAC have worked on these tasks in the following ways:

- Periodic IAC meetings with the Interim Minister, during which Rev. Meier provided guidance and advice on the interim process and received support, comments, and guidance from the IAC relative to development, refinement, and implementation of the interim process.
- Periodic IAC meetings and retreats with the clergy leadership in the development, refinement, and implementation of the interim process.
- Leadership retreats during which the Interim Minister addressed issues related to the interim process with the church clergy team and with other church leaders.
- Engaging members of the congregation, church boards and committees, and the Council to: foster their understanding of the interim process; gather information, advice, and guidance; and, to create ownership of the interim process implementation by the congregation. Engaging the congregation included IAC members meeting with church boards, committees, and individuals, a pastoral letter, articles in Church and Home, and relevant participatory activities during Council meetings, worship services, and the 2007 UCUCC Annual Meeting.
- Periodic reports to Council on the interim process, including progress, suggestions, and recommendations.
- Considerable attention to leadership expectations at the UCUCC Annual Leadership Retreat (see Appendix J, separate cover), during UCUCC Leadership Team meetings, and during Workshops with the Clergy Team and the IAC. A weeklong leadership retreat led by Reverend Meier focusing on the church's leadership style and adequacy for change and the overall effectiveness of the leadership team.

Status of Assigned Tasks

As the Interim Process draws to a close, products, either completed or anticipated, include:

- Congregational values statement.
- Results of the Congregational Systems Inventory.
- UCUCC Internal Identity Statement.
- Congregational perceptions and realities.
- A draft church vision.
- Leadership staffing recommendations.

The purpose of this document is to report progress on assigned IAC tasks to UCUCS Church Council and the congregation, including the status of the interim products listed above. This document also acts as a reference for the work accomplished by the IAC and, by its nature, acts as a resource for strategic planning for achieving the mission and actualizing the vision of UCUCS.

THE INTERIM PROCESS: INTROSPECTION AND DISCERNMENT

The Interim Process began by exploring values, norms, and ultimately identity. The IAC reviewed several existing documents and conducted other surveys and exercises with lay leadership and members in worship services to help define current UCUCS values and identity. The following elements contributed to development of the UCUCS Identity Statement.

Previous Work on Values and Identity

Following the retirement of Reverend Gail Crouch, the Pastoral Search Committee surveyed the congregation to assist in calling a new pastor. The survey provides insight into the identity of the congregation and its short-term vision during the year 2000. The survey results (see Appendix D) provide a basis to measure the validity of corresponding elements of the current interim process and are useful for gauging changes in the identity and direction of the church. The survey strongly indicated that being an inclusive, open and affirming, and/or accepting church was the most common way of describing UCUCS. Other common descriptions included: liberal/progressive; friendly and welcoming; caring and loving; and, a community. Relative to what the church's main goal should be, growth in church membership was most popular, followed by increasing the diversity of the congregation.

During the 2003-2004 discernment process, a forum was held to examine the unspoken norms of congregational life at UCUCS. Church norms in eleven areas were discussed. The following norms were identified:

- College-aged students are absent in church programming.
- Parents teach their own children in the Christian Education program.
- We are not overt in our support of marriages and partnerships.
- New ideas are welcomed.
- Money is difficult for us to talk about.
- Expectations of members are seldom articulated. Members have lots of autonomy.
- Putting faith in action is equated with liberal causes.

Priorities for years 2004-09, developed by the Discernment Task Force with extensive engagement of the congregation and adopted by congregational vote, provided insight into the vision of UCUCS during the years 2003-04. These priorities are provided in Appendix E (separate cover).

The reports of two consultants from the Alban Institute also provided useful information to the IAC in the development of the interim process:

1. 2003 draft recommendations by Sam Leonard of the Alban Institute (see Appendix F, separate cover).
2. A 2004 report compiled by Kathryn Palen of the Alban Institute (see Appendix G, separate cover).

Overall, the recommendations from these reports called for UCUCS to strengthen and clarify its clergy team model, enhance pastoral care, consider changes in the Sunday worship schedule, and reorganize lay boards to increase their effectiveness. They also pointed to a lack of commonly held clear vision and consensus on the church's identity, particularly in size-related issues, and a lack of intentionality in programming.

Interim Work on Values and Identity

During the fall of 2006, IAC members led discussions with 12 groups within the church, ranging from 4 to about 35 people. The following questions were adapted from a tool used at the fall leadership retreat and also focused on the 2004-2009 UCUCS Priorities:

1. Considering your personal understanding of church, are there any aspects of UCUCS that are non-negotiable, things that would have to continue in order for the church to be church to you?
2. What is the single most important thought you wish to evoke in the minds of others by the mere mention of our church's name?
3. Define your understanding of the radical message of Jesus referred to in the UCUCS Priorities opening paragraph, which reads: "Our priorities serve our desire and struggle to commit ourselves to ministries that unapologetically make real the radical message of Jesus and help equip us to live out his teachings."
4. On the reverse (side of the paper sheet), you'll find the priorities of our congregation in the spring of 2004. As you read these, what core values and beliefs emerge? What do these priorities say about who we are as a church? What, if any, aspects of our identity as a faith community are not represented in these priorities?

Responses to these questions were wide-ranging. Important values/norms included: the open and affirming covenant (10 groups); social action (6); welcoming (6); music and choir (5); and, friendly to families, children, and youth (5). Responses to Question 2 varied. In response to Question 3, love was most mentioned (8), justice for those on the margin (5), and acceptance (4). In response to the fourth question, many noted the absence of priorities related to mission, and social action/social justice.

The results from a November 2006 survey (done as part of a worship service) identifying the core values of UCUCS are shown in Appendix H (separate cover). Individually, participants were asked to winnow a list of core values to the single value most important in their understanding of our church. Love emerged as the dominant value. Other values that received numerous votes included: justice,

social action, peace, nurturing & caring community, openness, family, faithfulness, warmth, and integrity.

Interim Work on Environmental Realities

Internal Environmental Realities

Reverend Meier facilitated investigation of our internal environment and behavior traits by surveying the perspectives of several church groups and members. This was done primarily during the 2006 fall leadership retreat. Respondents were asked to rate seven characteristics, on a scale of 1 to 10, when viewing the church as a system of functions, services, relationships, and behaviors. The characteristics included strategy (planned or spontaneous), authority (concentrated or dispersed), process (mandatory or discretionary), pastoral leadership (managerial or transforming), relatedness (collegial or individual), lay leadership (managerial or transforming), and learning (maximum or metamize). Results of the survey are provided in Appendix I (separate cover). Note that discussion and interpretation of the survey is contained in Appendix J (separate cover). This survey reflects a somewhat diffused governance and leadership model, with a great deal of flexibility and autonomy to begin new initiatives but a lack of clarity about decision-making. There is generally a strong focus on managing well and less focus on transformational leadership. Survey results assisted Rev. Meier in his work with the Leadership Team and also informed the governance portion of the Identity Statement.

Church Membership Demographics

Demographics of the church membership and from the UCUCS Directory of Members and Friends are provided in Appendix K (separate cover). During the last eight years:

- Membership has declined 22 percent in the past 8 years and we now have 853 members. New members continue to join UCUCS, with 36 new members joining in 2006, a typical number for most years, but not enough to balance the decline. The Church Directory lists 368 adult individuals who are not members of the church, many of whom are spouses/partners or children of members.
- Worship attendance has declined 19 percent over the past 8 years; however there are approximately 235 youth and children associated with the church or its Christian Education activities.
- Those whose ages are 65 years or more have increased 10 percent, from 22 percent to 32 percent of the membership in this same time period.

External Environmental Realities

To understand the external environmental realities (the community, society, world) within which UCUCS exists, the IAC ordered a survey through Percept Information Sources and Systems, examining demographics and religious tendencies of the 16 zip codes in which 68 percent of our membership lives..

The statistics of the congregation's geographic distribution are provided in Appendix L (separate cover) and the ethnographic study report from Percept Information Sources and Systems is provided in Appendix M (separate cover). A summary of the information and some observations of the analyses contained in the Percept Report was prepared and provided to the congregation in an April 23, 2007 Pastoral Letter (see Appendix N, separate cover).

External environmental realities and some implications include:

- The study area of 400,000 people grew 7.5 percent over the last decade, a relatively slow growth rate compared to the US growth rate of 19 percent. We cannot expect new members due to population growth.
- The study area is 77 percent white, 9 percent Asian, less than 5 percent black and less than 5 percent Latino. It is doubtful we will draw an ethnically diverse membership from this community (University of Washington students are exceptions). Therefore, it will take intentional engagement to address our multi-ethnic interests.
- This area is not drawing young families with children. Less than 15 percent of households have children under age 17. We need to consider if families experience a vital Christian Education program and family-friendly worship when they visit our church, and whether our programming for families will meet their needs on a long-term basis.
- This is a highly educated population. We should consider tending to the intellectual interest as well as the heart, and we should leverage attraction opportunities (literary, adult education, University connections, etc.).
- Seventy-five percent of households have one or two people, like our church family units. This is a moderate-to-higher income area, like our congregation.
- The rising professional and educated new starters constitute 34 % of the area; the average and median age is 39 years. We should think about how to attract these younger professionals. In general, we need to pay attention to the age profile of our congregation. Our congregation membership is older than average-- 32 % of our members over the age of 65 years, as compared to 12 % of the catchment area. Fifty percent of our pledgers are over the age of 60. To balance our aging membership, we will need to be intentional to attract the younger people and families from this catchment area, especially the largest group – the "Survivors" (born 1961-1981).
- The households have few strong ties to a specific denomination. Our openness to interfaith dialogue and "believers, seekers, and doubters" may be appealing if we can reach these folks.
- The primary concerns reflect the realities of professional people looking for career and financial security. There are implications for our ministry and programming, e.g., recreation, companionship, health, and friendship-building activities.
- The households are interested in contemporary worship, music, and architecture.

- The people in many of these households are not looking for a church. Fifty percent are not involved with their faith, and only 10 percent list “finding a good church” as a primary concern. We’ll really have to entice them.

Identity Statement of UCUC

The Identity Statement was developed collegially by Rev. Catherine Foote and the IAC following completion of the IAC values, norms, beliefs, and environmental work. The statement was developed for internal use to ensure candid responses and an unvarnished picture of who we are as a community of faith today. Drafts of the Identity Statement were discussed with Council, the Clergy Leadership Team, and other members of the congregation prior to sharing the document with the entire congregation.

Pastoral Letter

A Pastoral Letter containing a draft of the Identity Statement and a discussion of some UCUC and surrounding community realities was mailed to the congregation on April 23, 2007 in preparation for small-group discussions at the Annual Meeting (see Appendix N, separate cover). Comments generated at the annual meeting led to further revisions and a sense of confidence that this reflects a fairly accurate picture of who we are as a faith community.

The Identity Statement sharpens our understanding of self by examining UCUC’s history, values, personality, characteristics, behaviors, and environment. It sheds light on both strengths and weaknesses, enabling the congregation to build a vision on an accurate self-assessment. The UCUC Identity Statement is provided as Appendix O (separate cover).

Interim Work on a Draft UCUC Vision Statement

The importance of a church vision was stated clearly in the Alban Institute report (Appendix G), well before the current interim activity. Rev. Meier underscored the need for a vision statement as the IAC moved forward with the Interim Process. Indeed, the early tasks of the Interim Process were intended to move the congregation towards discernment of a vision. Rev. Meier and the IAC asked the Leadership Team to prepare a draft vision statement. Visioning exercises by Council during May 2007 and by the Leadership Team were also facilitated by the IAC and Rev. Meier.

The Leadership Team proposed the following vision statement at the June 2007 Council meeting (see Appendix P, separate cover):

“taking Love, to hard places”

During July of 2007, IAC members shared this draft vision statement with approximately 25 individuals representing different groups and interests within the church. Their thoughtful responses were discussed by the committee and forwarded to the Leadership Team for consideration.

Clergy Leadership Team Support and Participation in the Interim Process

The Leadership Team has enthusiastically supported and participated in the Interim Process. Considerable time has been dedicated during Staff meetings to the Interim Process, and the voice of the Staff has been unified. Some of the Leadership Team statements made during the Interim Period, such as Council Staff Reports, are provided in Appendix Q (separate cover).

DISCUSSION AND CONCLUSIONS

Leadership of the Interim Process by Reverend George Meier has been vital and comprehensive. The balanced IAC membership has accomplished its tasks, with many meetings as a group and several meetings with other church entities as dictated by the task at-hand. The IAC has helped to facilitate a period of introspection and discernment, producing materials that will support the congregation's efforts to live fully into a new vision for UCUC.

As evident by the church's history, UCUC is a strong, faithful church, and it has tremendous potential for new vitality and growth. Moving boldly into a new vision will require constant monitoring of the church's health and the willingness to make changes as dictated by self-analyses, the environment, and our perception of being faithful to God's will for our church. Change is often difficult, possibly perceived as harmful and dangerous by some who are comfortable with the status quo. The required changes must be lovingly effected. The 115-year history of this church shows a willingness to respond faithfully and courageously to the radical message of Jesus Christ. Beginning with the year 2000 congregational survey results (Appendix D, separate cover), sufficient information has been amassed to accurately define the identity of UCUC (Appendix O, separate cover) and to draft a vision statement (Appendix P, separate cover) that reflects the church's core values while inviting the congregation to imagine new paths for discipleship.

From the information gathered, some idea of the corporate personality of the congregation and its surrounding community can be discerned. An understanding of the congregation's personality is useful when selecting staff leadership with compatible traits. Providing leadership that moves the church toward balanced personality traits is important to the church's health and future vitality.

Internal environmental realities speak to the health of the church and what needs to be done to be healthier. The Alban Institute Report urged development of a vision to help focus the church programming and budgeting. It also assessed the effectiveness of the UCUCS leadership structure for a corporate (large) church. The relevancy of the Alban Report's recommendations is evident in the attention given to leadership during the Interim Process and reflected in statements from the Leadership Team (Appendix Q, separate cover) concerning the need to clarify our authority and the desire and need for a balance of leadership between laity and clergy. While the IAC and the Leadership Team have held candid discussions on this topic, it is one that merits broader discussion in the future.

The church's membership demographics do not tell the whole story, but they do have meaning and implications for the church's vision and planning processes. They need not be used as a metric of success or failure, but are important indicators as to how the church is achieving wholeness and vitality.

Implications drawn from UCUCS's internal and external realities require attention and action, and may be critical for the future of this church. It will be important for future visioning, planning and actions to recognize and incorporate this useful information and insight into our community as well as the community around us.

The draft vision statement proposed by the Leadership Team (Appendix P) encompasses much of the UCUCS ministries in social justice, peace, and in our pastoral care. A broad interpretation of "hard places" also invites the congregation to consider less obvious in need of support, healing or reconciliation ministries (e.g., Christian education, small groups). The statement has significant theological depth and provides considerable Christian legitimacy for our way forward. Even though the statement provides insight into who we are and who we desire to be, not all in the congregation may be attuned to the language used. Part of the value of the statement is that it uses language that has many meanings, all leading to the same place. Yet some within the congregation may have difficulty internalizing the statement since it does not specify concrete tasks and may seem overly vague. Work will be required to arrive at the vision needed by the church to move forward and remain vital.

RECOMMENDATIONS

The IAC makes the following recommendations to the Church Council:

1. Identity Statement: Use the Identity Statement as an important framework for addressing our strengths and acting in areas that need healing or change, making use of the data and concerns gathered during this extensive internal process to move forward into a new vision. Further, we recommend that Council direct the Communications Board to develop a short, concise identity statement for external use that can be posted on our website and other places to reflect the work we have accomplished over the past year.
2. Vision: Try out the Leadership Team's proposed Vision Statement (or a revision of it) joyfully in the coming months. We encourage the Leadership Team to engage the congregation in explaining it, testing its congruence with our Covenant and places where people feel passion about the work of the church and the needs of our faith community. See how it fits for older members, youth, families, and for both individual and corporate faith journeys.

From the IAC's informal and rich discussions with more than 20 members we propose consideration of this revised phrase -- **"Being God's Love in Hard Places."**

3. Clergy Position*: We recommend a fourth clergy not be called to serve University Congregational United Church of Christ at this time, and that the Leadership Team be comprised of the three ministers and a church administrator. We recommend that Council charge the Leadership Team with developing a clear description and rationale for this team model that provides strong, coordinated, and passionate leadership, making sure the congregation fully understands this model and how responsibilities are assigned.
4. Team Ministry*: Keep team ministry strong. Build on the leadership development work by Interim Minister George Meier, ensuring opportunities for leadership development for both clergy and lay staff. Additional staffing changes proposed by the Long Term Staffing Task Force should be considered within the context of this revised team leadership model, ensuring that such changes make more effective use of the gifts of the Leadership Team and lay staff.
5. Church Growth: Focus on church growth given our internal and external realities. Use the tools from the Interim Process to strengthen and clarify ways to more fully support our existing members and attract others in the community who are seeking a progressive, nurturing faith community.
6. Governance: Streamline governance within the church to use the talents and energy of staff and lay volunteers more effectively. Institute periodic assessment opportunities to ensure we are maintaining a balance of spiritual and material needs.
7. Priorities: Council should review our current priorities (2004 - 2009), reporting on what we have accomplished and what remains to be done. Ensure that current and future priorities are consistent with our adopted Vision and provide clear direction to staff and lay leadership.
8. Interim Time: Formally end the interim time and move forward with energy and joy as we engage in developing and testing a strong vision for the future.

** The IAC recognizes that the configuration of the team ministry and the team ministry itself may change in the future in response to vision, opportunities, and needs. Our recommendations are based on where we believe UCUC is at this point in time and where our vision may take us in the foreseeable future.*