

**UNITARIAN UNIVERSALIST PARTNER CHURCH COUNCIL
GUIDELINES FOR NORTH AMERICAN PARTNER CHURCHES**

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**These guidelines are available on our website at
<http://www.uupcc.org/partnerships/resources-partners>**

UUPCC GUIDELINES for CHURCH PARTNERSHIPS

Introduction

The Unitarian Universalist Partner Church Council, affiliated with the Unitarian Universalist Association, is pleased to offer the following guidelines for churches that are considering partnership relationships with churches from other countries, particularly where the partnership is likely to involve financial relationships. These guidelines are directed primarily at North American churches (the UUPCC's members) and the research that produced these guidelines focused on partnerships between North American UU churches and Unitarian churches in Transylvania, Romania; but we hope that they will be useful for other church partnerships involving other denominations and countries.

In creating these guidelines for the UUPCC, a task force to carry out research on "Economic Fairness and Awareness" was created. It interviewed sixty people from ten partnerships, thirty from the US church and thirty from the Transylvanian partner. There were then seven focus groups of people involved in partnerships, four in different regions of the United States and three in Transylvania. Regional meetings in both the US and Transylvania to review these guidelines in draft form were the next step. This final version of the guidelines incorporates feedback from these regional meetings. It will be presented to the UUA General Assembly in June 2005.

The task force on Economic Fairness and Awareness recommended to the UU Partner Church Council that its mandate be interpreted as exploring the use of money in a way that promotes the healthiest possible partnership relationship between the two churches. In other words, its focus was on developing and sustaining the individual partnerships, not developing mechanisms that would equalize the benefits of partnerships across the entire range of Transylvanian and American churches. The task force's focus has been the health and sustainability of the individual partnerships, particularly as it might be affected by the transfer and use of money.

As will be obvious from the following guidelines, the task force has followed several critical principles that are most important for congregations to address as explicitly as possible. They are:

Preserve and protect the long-term health and sustainability of the partnership;
Ensure reciprocity and equal commitment between the partners;
Through constant and multiple means of communication, strive for the deepest and broadest possible partnership, particularly given our shared faith, however differently it has evolved; and,
Ensure that money and other economic relationships don't dominate and overwhelm the other more profound manifestations of the partnership.

Finally, guidelines are just that, guidelines. They are the result of the task force members' examining the interview data and then using their best judgment to formulate these guidelines. But we certainly understand that they may not fit all partnerships' needs. Still, we urge all congregations to review these guidelines and the principles that underlie them as they work together in partnership.

Finally, while these guidelines appear structured for partnerships just starting up, they are at least equally relevant to existing partnerships as a tool for review and assessment and then mid-course correction. The interest of the Transylvanian churches to develop parallel guidelines will also serve that objective.

Building the Foundation of Partnership

Start building your foundation at the very beginning, both within your own congregation and with your prospective partner. Some "mistakes" are virtually impossible to undo, so put a lot of effort into the groundwork. All congregations should periodically review the UUPCC material for new partners especially "Growing Relationships" and "Start Up Questions".

Have conversations about your vision of partnership with your partner. Discuss what each partner seeks in partnership. How are two congregations going to be in relationship? What are the theological underpinnings of the partnership? Start a process of equal involvement in decision-making with mutual determination of goals. A congregation-to-congregation partnership needs more than a single relationship. Several people should be involved in each congregation, including youth who are more likely to overcome barriers of language and communications technology than their elders.

In these initial conversations, both parties need to be aware of differences in how the two parties may view the partnership. Americans often believe it is about helping these "poor" people; their need is so great, and we are struck by their need and truly want to do something about it. Transylvanians more often want true friendship (with or without money) that is a real community (individual by individual) commitment. They know they need the money too, and are accustomed to money flowing from west to east, but want something more soul-satisfying for them and for us.

Don't make assumptions that your partner church's culture is like yours. Be open to listening carefully. The work of partnership is knowledge, understanding and acceptance of your partner's history, culture, customs, and theology. Be sensitive to differences when explaining your culture, theology and customs. These differences may be more acute in partnerships involving a rural Transylvanian community and an urban American partner. Also, it is essential to be prepared to discuss the theological differences that certainly exist between North America and Transylvania.

Create a process to define and celebrate the theological underpinnings of the partnership. Include theological reflection in your partner church activities.

Money is not always needed to be part of the partnership's interaction. Leading the relationship with gifts of money may create unhealthy dependency and paternalistic relationships. Large amounts of money (over \$500 USD) have a very big impact. We should always be thinking about the potential of money and how it will impact the relationship. Be prepared to openly explore the role of money early in the relationship.

First expenditures of money should be for relationship building: communication (frequent and regular personal contact via e-mail, phone calls, and letters) travel and quality translation. Use all means of communication as frequently as possible. Other early expenditures of money could include joint training for cross-cultural awareness, technology for communications support, or consensual decision-making, with a particular priority for communications technology (Internet).

Always consider sustainability of any project before you begin. The history of charitable flow of money from West to East has created an expectation of charity and an unhealthy dependence on the charity model. Ask questions. Can the project be continued in the long term? Is it too dependent on particular individuals? What are the long-term effects?

Creating a Sustainable Partnership

Develop an ongoing vision of a shared sustainable partnership. Evaluate decisions and activities against this vision. Work towards the creation of a **written** covenant that describes how the congregations agree to be together and what they each seek from the partnership. Talk about who will be responsible for having these discussions. Define what each partner needs to maintain the partnership. Talk together about the impact of money and economic issues on the relationship. Create a rolling wish list. Share your dreams and prioritize together.

Recognize partnerships have different phases. Partnership is not a static relationship. As congregations, ministers and lay leadership changes, the relationship will go through changes and may include aspects of various stages. New people should review "Start Up" material.

Acknowledge the constantly shifting context - cultural, political and economic. We need to be educated and aware of how these changes impact our partnership. Develop and seek out workshops on issues important to partnerships.

Involve ministers, lay leaders, youth and the congregation as a whole to insure depth and breadth of partnership. Creating a partnership council within each partner church helps to solidify and broaden the church's commitment to the partnership. Incorporate partnership into Sunday services and religious education programs. Support youth and/or choir involvement in visits and activities.

Trips are important. Some specific guidelines for the American partners follow: Learn some Hungarian! This is a way of expressing respect for our partner and helps us make a statement about our commitment in a way that is not materialistic.

Review the PCC Travel Guide before every trip. Have conversations about money with your committee and your fellow travelers before you go. Realize that when you get to a village, you may be emotionally overwhelmed. Recognize that responses to these feelings are best handled through the partnership. If you respond to a need for money to one person, it may not be appropriate or may be perceived as being unfair.

Our partners would like North Americans to stay longer to experience everyday life; they sometimes feel that the American visitors are more tourists than long-term partners. View your visit as a sort of pilgrimage.

When you visit observe current fair compensation guidelines for room and board. (The 2005 standard of UUPCC Travel and Harvest Hope is \$15 per person / per night for bed and breakfast. An additional \$10 per day is added if travelers are eating lunch and dinner with their hosts. This is automatically paid as part of your trip expenses if you are traveling with either service.) By making similar contributions we will minimize the financial burden of the visit and will be supporting fair compensation among our hosts.

Pace yourself. Do not make promises in the heat of the moment with individuals or within the partnership. Our culture of positive thinking and problem solving does not necessarily translate in the reality of our partners' lives. Remember that you *and your congregation* are in this for the long haul.

Recognize the generosity of others is not always measured in dollars and cents. Understand the importance of gifts and be openly grateful. The gifts you receive come from the giver's substance and not from their abundance.

Try to ensure reciprocal travel opportunities for ministers, lay leaders and youth from both congregations. Consider creating long-term travel goals and a travel fund to facilitate future trips.

Be open about money. Gifts to the church should be sent to minister and lay president of the congregation. Individuals should not make significant contributions to individuals without discussion within the local partner church committee and the partner church minister.

Exchange information about decisions related to expenditures and income. Ask them how they make decisions and raise money for the church. Define who makes financial decisions about giving/funding and receiving /funding. Address the Transylvanian sense of inequity and indebtedness to their North American partners. Encourage Transylvanian contributions to the partnership (financial or otherwise)

Create mutually agreeable systems for accounting. Find out what kind of accounting system is used before negotiating about how to do accounting for any project. Make clear agreements about financial reporting, so the provider has reasonable assurance on how the money will be spent; but don't go overboard on complicated accounting and financial reporting practices.

Define targeted funds clearly in agreement with your partner. Differentiate between giving money and saying "here's the money, give it to the needy," and giving the money and saying "create a project/program to help the neediest." Ask for feedback and information and be open to trying to understand the impact of the money.

Support capital projects, rather than core operating costs. This approach is more conducive to a sustainable partnership. Undesignated money does not encourage a sustainable relationship. Don't give money in a way that encourages long-term dependency on your money for a project, salaries, etc. Consider creating a matching funds/labor/services model. Have a mutually agreed upon end point for capital projects.

Discuss impact of regular ministerial salary subsidies and/or annuity supplements. This may not be sustainable and should become responsibility of your partner church. Contributions to the operating budget of the church could be used, if desired, towards minister salaries.

Mutually establish a program for scholarships; think beyond academic degrees to vocational training/trade school, etc. There are many successful models in existence. Ask your partner to identify a model that will work for their community. Support English language training for all ages, as this enhances job opportunities and is vital for communication. (Again, this issue is a high priority for our Transylvanian partners.)

Step back to evaluate thoughtfully. Keep and review records to maintain institutional memory of your partnership. Broaden and deepen the relationship by including others. Review your religious foundations. Develop an awareness of and act in accordance with one's values. When in doubt, try to do no harm to the relationship. If a problem develops, avoid the mind set that more money will lead to a solution, instead mentor critical thinking, truth seeking and justice making.

Maintaining a Healthy Partnership

Discuss your vision of partnership or re-covenant whenever there are ministerial changes in either church or any sense of need for renewal. Anticipating and then carefully managing successions of ministers is critically important.

Maintain active congregational interest through organized and motivated lay leadership, active ministerial support and involvement by all age groups in the

congregation. Work to pass leadership and participation in partner church activities to others in your congregation. Minimize the effect of internal congregational politics on relationships.

Prioritize relationship building over economic development. Projects should not take on more importance than the discovery of friendship, commitment, and religious fellowship. Work to maintain the integrity of *partnership between congregations*.

When both partners seem ready and there is good communication and a strong foundation of trust consider initiating or supporting large projects or community economic development. Continue to use joint decision-making and joint fundraising. Creating dependency is undesirable.

Don't expect churches, lay leaders or ministers to manage complex projects. Work together to create appropriate organizations to carry out/manage the work. Ensure the organization has the capacity to do it.

Be careful not to reinvent programs that are in existence. Do research and make a critical business plan when considering a large project. Consider creation of a charitable foundation and/or support for social programs in the community at the suggestions of your partner church which address broad based community needs.

Explore collaboration with churches in the same region. This information is available on the UUPCC web site.

Reassess existing programs periodically with your partner. Use the "Characteristics of an Effective Partnership" as a basis of your evaluation:

1. There should be equal involvement in decision-making from both partners, with mutual determination of goals and collaboration on project design and implementation.
2. The relationship should be reciprocal in that each partner gains in some way from the other—economically, spiritually, or otherwise.
3. A sense of mutual trust and respect should exist between the partners, as is necessary for any healthy relationship to grow.
4. The partners must encourage open communication and cooperation, striving to understand one another's backgrounds and perspectives as well as learn from their differences.
5. There should be elements of capacity building and knowledge sharing in the relationship, building on the principles of mutuality and reciprocity and helping each partner to grow.

6. The partners should be both flexible and structured in their organization, able to adapt to new situations and circumstances as well as remain true to their missions.

Seek help from UUPCC if the partnership runs into problems or is in crisis. The UUPCC Executive Director, Executive Committee members and Networkers have experience with partners who have used mediation to work out conflicts or mutual separations.

Celebrate milestones and events together. Share your success on the UUPCC Chat and in the newsletter, so we can learn from each other.

UUPCC Fairness and Awareness Task Force
Denise Davidoff, Chair
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