

Legacy Working Group

Description

The Legacy Working Group is an active and engaged team that is selected and authorized by a relevant governing body. This group helps facilitate the Legacy process, working closely with denominational leadership and contracted professionals through the duration of the process. The Legacy Working Group continues (in one form or another) past the closing worship service and through the legal conclusion of the dissolution process. The exact name for the group is flexible, but should convey the sense that the group is formal, authorized, active, and task-focused.

There are two phases of the Legacy Working Group, roughly marked by the time before the formal vote for dissolution, then after the closing worship service. Prior to the formal vote for dissolution, The Legacy Working Group is authorized and empowered to make recommendations to governing bodies and the congregation, but does not have responsibility for making decisions. The Group is obligated to operate within church bylaws and denominational polity, which also means the exact method of decision-making and scope of responsibilities might vary in your church.

Following the formal dissolution vote and the closing worship, the Legacy Working Group may become the authorized governing body that will be responsible for the final logistical tasks of corporate dissolution.

Legacy Working Group responsibilities include:

- A commitment to the Group for the duration of the process
- Compiling necessary background materials and facilitating the tasks of “Getting Your House in Order”
- Engaging in field work such as research, conversations with other congregations, community partners, and contracted professionals, exploring Legacy Gift candidates (distribution of remaining assets)
- Helping to plan and facilitate congregational discernment gatherings
- Acting as a liaison to the leadership and congregation (Communication!)
- Drafting a Legacy budget
- Maintaining accurate minutes/notes of meetings

Legacy Working Group Composition

The Working Group is comprised of 5-7 members. The Group meets regularly with emails, calls, and other work between meetings. In cases where an existing governing body acts as the Legacy Working Group, it is strongly recommended that Group meetings are convened as a distinct session.

For the sake of team cohesion and process progress, Legacy Working Group meetings are not conducive to “observers” or a rotation of members. Gatherings, surveys, assessments, and routine communication serve to broaden the input from the wider congregation. It is also typical that individuals who are not Group members could be invited to a meeting for a specific purpose, and that other individuals may be invited to work on specific tasks. There will be plenty of work for everyone, and plenty of opportunities for folks to engage!

The Legacy Working Group should identify a chair or point person as well as a notetaker.

Individual Characteristics:

While no Group or individual member will meet all of these criteria, a number of characteristics help us form an effective Working Group.

- Someone who is currently an active and engaged member of the church: attends worship (in-person or online); has a history of making contributions of Time, Talent, and/or Treasure; has a general awareness of congregational life
- Is able, willing, and available to be actively engaged for the duration of the process and possibly beyond
- Can approach the process with curiosity, patience, and openness to the Spirit
- Has the ability to work collaboratively and help build consensus
- Is in touch with the spectrum of perspectives, opinions, mood of congregation
- Is familiar with history of the congregation (Though they do not have to have been present for the whole history!)
- Is comfortable with technology (Ex. email, Zoom, Google Drive, PDF, etc.)
- Is viewed as someone who has the best interests of the congregation at heart.
- Can “do hard things” — because this work can be emotionally trying!
- Bonus Round: Has expertise in finance, legal issues, relationship with the denomination and/or other local UCC congregations, sense of humor!

Overall Working Group Characteristics:

- Has a blend of Visionaries, Strategists, and Doers
- At least 1 person on a leadership board (Council, Consistory, Trustees, Cabinet, Deacons, etc.)
- Mix of membership length
- Reflects demographics of congregation (age range, gender, sexual orientation, dis/ability, racial/ethnic, family composition, etc.)
- Best practice: No members from the same household, relatives, or relationship partners, no relatives of staff members, and no staff members aside from clergy