

Creating Effective Organizations with a Future

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My Introduction

- For the past several years, I have served on various organizational boards and committees that have been faced with reorganizing or building structures to move into stronger futures and creating a sustainable presence.
- Creating structures for our organizations can bring out the best and worst in those working on it and a variety of dichotomies.
- Lack of structure can kill an organization with even the best of intentions.
- Let me preface. *I am not a lawyer, an accountant or insurance professional.*
- I present this as someone who has seen many ways that work and what happens when you take the time to put necessary structures in place to serve the organization and their members.
- My hope is that this can prove useful for you in creating of your organizations.
- To create an organization or religious institution of any kind requires structure for the governmental approvals and for us to be taken seriously by other religious institutions.

Coven Resource Tools

- Within the Wiccan religious traditions, Amber K's book *Covencraft: Witchcraft for Three or More* and Judy Harrow's book *Wicca Covens: How to Start and Organize Your Own* are good resource tools for those looking to start a coven.
- These books talk about issues such as finding and creating coven structures to the business, financial and counseling activities associated with running a small Wiccan based congregation. Included in these texts are basic liturgical outlines for rites of passage, how to create intergenerational activities that are open to children, creating change intentionally along with basic pastoral counseling guidelines.

More Resources

- I am of the opinion that we do not need to reinvent how religious organizations are structured or organized. Using models that already exist, adding and substituting our jargon, terminology, and interfaith language, and creating the vision in alignment with our ideals there can be ease in the process. Interfaith language is already used in many of these structures and is what most decision makers are familiar with. There are also many liberal religious organizations and religious resource organizations that we can learn from.
- One such organization is *The Alban Institute* in Bethesda, Maryland. They are an interfaith educational organization offering seminars, publications, research and consulting services to support church structures. They work with small to large congregations, a variety of religious traditions, a diverse ethnicity, men, women, and rural and urban settings. The institute is a 501c3 religious education organization.
- *Books and periodicals from Alban* include everything from conflict management, creating financially strong futures, pastoral counseling information, creating strong volunteerism, and so much more. Their material is applicable to those groups looking at creating long term religious churches, temples and such. Their work is not only for those who minister but aid groups in creating shared ministries of all participants. So there are books for clergy, activists, organizational officers and laity in a congregation. Their website address is www.alban.org.
- The *Unitarian Universalist Association's website* also offers many resources for those creating liberal faith organizations. They offer great material on subjects such as: developing religious education programs for children and adults; social action projects; capital campaigns for creating buildings; charitable giving program development; developing endowments; and

long term investment programs. The UUA has not only online resources to peruse but also publications and tools you can order for developing your religious organization. Their website can be found at www.uua.org.

- **Skinner House Books** is a publishing arm of the UUA. Their books and publications cover a variety of topics for congregational administration to religious education to meditation and worship tools. Oh yes and...their worship tools are applicable to earth religious traditions.
- My favorite book by Skinner House is a book called **ChurchWorks** by Anne Odin Heller. This book guides you through the creation of healthy organization building and the pitfalls of unhealthy building. The book talks about organizational structures as though they are parts of the body. It is a fun and delightful view that as a Pagan organizer has given me much insight in what defines healthy and unhealthy religious organizations. This is the book I also most often use when coaching groups on unhealthy situations they are facing in their organizations.
- These **educational groups and books do not encourage organizational models that are run by one person or created in cult type models**. They are models that encourage open ministry and caring for a community as a group process and not on the shoulders of the organizer, and their models and ideas are applicable to earth religious thinking.
- There are also many **books on the market for how to build non-profit organizations, create their structures and such**. It will take a variety of people to do this effectively for an organization that is intended to last.

Government Resources

- **Guidelines of the Federal Government**. Religious institutions are businesses and they need to be structured and ready to account for themselves to the government. There are many kinds of religious organizations from the church, temple and mosque structures to educational organizations to activist organizations to charitable organizations to for profit businesses serving religious communities.
- **Publications and information abounds at www.irs.ustreas.gov**. Everything from handling employee taxes, to social security for organizational employees, to guidelines for tax-exempt organizations can be found here. Handbooks and pamphlets can be downloaded or you may request them to be sent. Be sure to review the state guidelines in the state where your organization is established. Each state has different guidelines.
- **Not every organization developed will want to be non-profit as a religious institution**. If you decide to organize as a religious institution you cannot lobby for political causes or candidates as a group or organization. You can merely empower your organizational members to work for those ideals you hold dear as individuals.
- **Familiarize yourself with the distinctions of words** such as private foundations, charitable organization, educational organization, convention and so on. Each of these terms has specific financial implications to the government and can help you get clear on the kind of organization you are developing.

Creating Financials & Legalese

- **Consult with financial accountants** on setting financial structures of your organization.
 1. Learn what information is mandatory for public or membership dissemination.
 2. Hiring or consulting with someone will aid you in setting up your records, bookkeeping, and auditing processes.

- ***Good accountants*** can also aid you in looking at the types of oversight your organizations will need to oversee spending, cash flow and long term investing.
 1. You can determine with them a system of checks and balances, signers to accounts, and which money management software packages will best serve you.
- ***A lawyer familiar with religious and non-profit law*** would be good to have on hand.
 1. This is someone to turn to review potential contracts, legal situations, oversee your process of organizational development and so much more.
 2. Don't wait until there is a crisis to have someone who can give advice on legal matters on your side!
 3. Check with your state's bar association or accountant's organizations to find someone who can work with you. Make appointments to interview them to see if they can work for your organization. Be straight and honest about the vision you have for your group and the faith tradition of your group.
- ***Long range financial planning consultants*** can help you establish accounts for long range financial plans. They can also support you in establishing processes for accepting bequests and endowments from those that may pass on or leave money to your organization.

Bylaws, Policies and Rules

- *Begin by looking at the governing structures when building an organization.*
 1. All of this can start with simple brainstorming sessions with those interested in such matters.
 2. You should research how bylaws for organizations like yours are written.
 3. Contact other religious institutions in you area whether Pagan or not and see how theirs are done.
 4. Check online for sources out there.
- *Check with your state government to see what the legal requirements are regarding the governing rule.*
 1. Each state has certain basics that are required.
 2. Be clear of these and incorporate them into yours.
 3. A good organizational lawyer can give you these details, too.
- *Bylaws are the legal way in which you say you govern yourself.*
 1. Your officers and boards are bound by them and cannot necessarily change them at will.
 2. They should be difficult to change and require more than a board vote or one person. Ideally, they can only be changed by a vote of a certain percentage the membership.
 3. They let the membership and government know how you are set up.
- *A structure for how policies will be made.*
 1. Have some process for how policies are created, by whom and what checks and balances will be in place to make sure they are in alignment with the wishes of the membership and the vision and needs of the organization.
 2. When a policy is voted on and in place make it public and have it in a place where membership can refer to it.
 3. Policies are different from bylaws in that they can be changed and tend to be made when a problem occurs that shows you how to do something.
 4. They are guidelines and can be shifted to better serve the organization as it grows and ages.
 5. Make them available to the membership so people know how to do things.
 6. Don't let members wait to step into a situation and be told they did not fulfill the expectation when it was not clearly communicated.

7. Policies can be around how your gatherings are run, committee charges and jobs, building or facility use, public presentation when you are representing your organization in the larger community.
8. By talking with other Pagan organizational leadership you can begin to see how they create this process for their organizations.

Insurance Protections

- *Many earth religious organizations overlook the insurance they need to have to protect themselves from lawsuits.*
 1. Having someone sign a waiver at a gathering does not necessarily relieve you from responsibility.
 2. Lawsuits can occur and you need to protect those who are the organization's leaders as well as the overall organization.
 3. If you do not have insurance, each person on the board, council, and officer can be named personally in a lawsuit. This puts their personal property at stake for the organization.
 4. If the organization will not get its own insurance and you are truly committed to seeing it through, look at insurance riders for personal property or homeowner policies in case you serve on board of directors and such that did not have protection. That way if a suit occurs you will be protected.

- *One insurance organization that has dealt with religious organizational insurance for years is Church Mutual Insurance Company.*
 1. They are the leading insurers of religious facilities, camps, offices and institutions in the country. Currently, they serve over 70,000 houses of worship and religious organizations with liability, property, compensation and vehicle insurance. They can be found at www.churchmutual.com on the Internet. Currently, there are a few Pagan organizations insured by them.

Most Important...Have Fun!

- *Bringing forward the vision of an earth religious organization is exciting. It seems to be part of the evolutionary process for us and gives us legitimacy. It is fun and exhausting work.*
- There will be times when doing it will not look like a good idea.
- There may be times when it appears no one on the team can reach consensus, let alone hear one another.
- If the call of the vision is to be brought to fruition it will be.
- It may take on a different time frame. It may shift, bend and take a different shape than originally anticipated. Let it and Spirit guide you.
- Give the process its space to unfold and be birthed.
- Find where it is you too can grow from all you work through together.