SHIFTING PARADIGMS: USING ACTION RESEARCH TO REDEFINE ENGAGEMENT IN

FAITH FORMATION IN UNITARIAN UNIVERSALISM

A Dissertation

Presented to the Faculty of

Graduate School of Leadership & Change

Antioch University

In partial fulfillment for the degree of

DOCTOR OF PHILOSOPHY

by

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June 2021

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This dissertation, by Amy Huntereece, has
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Graduate School in Leadership & Change
Antioch University
in partial fulfillment of requirements for the degree of

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ABSTRACT

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FAITH FORMATION IN UNITARIAN UNIVERSALISM

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The issues that this research addressed were the changes related to engagement in religious

education (RE) in the Unitarian Universalist (UU) church in the past several decades. To address

this problem, the purpose of this research was to innovatively problem-solve with other religious

professionals and consider how to redefine engagement to support families in their faith

formation. The research aims to answer the question: How could UU RE professionals more

effectively engage families in faith formation opportunities designed to meet the desired

outcomes of RE parents/caregivers? To gather data, interviews with seven Millennial and

Generation X parents/caregivers from the Baja 4 UU congregations in Southern Arizona were

conducted. The interviews were transcribed, coded, and analyzed. The data from interviews

provided insight about Gen X and Millennial parents'/caregivers' needs, desires, and

expectations and gaps in their RE program, types of multigenerational offerings, and alternative

approaches to engagement. A new RE engagement pilot study was designed by a team of

innovators and launched for three weeks. Following the pilot study, a summarizing focus group

was facilitated. Parents/caregivers had the opportunity to offer additional thoughts, suggestions,

and ideas. Together we made meaning of the data from the interviews and focus groups and

synthesized it to redefine engagement and offer pedagogical indications for the future of faith

formation in the UU church. This dissertation is accompanied by one MP4 file. This dissertation

is available in open access at AURA, http://aura.antioch.edu/ and OhioLINK ETD Center,

https://etd.ohiolink.edu/etd.

Keywords: Unitarian Universalist, religious education, faith formation, engagement, Generation

X, Millennials, parenting, action research, adaptive leadership, collaborative leadership

Acknowledgements

This dissertation was written during 2020, a year that is remembered by most as the year of a global pandemic, COVID-19. In January 2020, I heard some folks adapting the adage that 20/20 vision delivers clarity and sharpness, so the upcoming year would have potential for epiphanic ideas. I eagerly planned my timeline with hopes for completion in 12 months. Little did I realize how emphatically my research would resonate with the realities of the world.

I entered candidacy in March 2020 as the COVID-19 virus entered the United States with a vengeance. Mandatory business closures and stay-at-home orders caused a shift in my own paradigms. All social interaction was postponed indefinitely, and most of us were limited to mostly staying home and occasionally venturing out for walks in the forest. I quickly realized the conduciveness of writing a dissertation during quarantine. Through the spring my life was simplified, and focus was narrow. That tenacity continued throughout the summer months, and although that rhythm was a boon to productivity with dissertation writing, after weeks and weeks, maintaining the focus became more difficult. Warm summer days gave way to chilly fall evenings, and I felt that I was behind on my timeline.

On one particularly frustrating and challenging day in November, I turned to my support, my girls: Roz, Nic, and Stacey. The girls began a writing group who met nearly daily on Zoom. The intention was to share a space to work together and support each other with school, and life. I am so incredibly grateful for that space. We began each session with gratitude and goals. On that particular November day, they encouraged me to step away. The laser-focused perseverance and speed at which I was working were wearing me out. I heeded their advice and drove out to the desert and widened my focus to the horizon and vast expanse of the Arizona sky. A hawk stole my attention as it keenly evaluated the varied terrain of the native lands below. On that day,

I realized that this journey was not only about writing a dissertation that would be published when it was all done and would allow me to write a PhD after my name. The dissertation journey is about allowing for the ebb and flow of life, setting realistic expectations, trusting the process, practicing reflexivity, giving grace to others and myself, allowing light to shine into dark and scary places, leading in love, and maintaining a hawk's perspective.

So, it is with the deep roots of the Ponderosa Pines and the soaring perspective of the hawk of Northern Arizona that I acknowledge with deep gratitude:

Hunter, my dear husband, and soul mate. Thank you for believing in me and keeping me balanced. You taught me that the most important letters behind my name are M O M.

Mollybeth, my dear daughter. We started these four special academic years together, you a high school freshman and me a neophyte doctoral student. Those years brought many challenging lessons for you. I am so proud of your tenacity to forge through and find your own way. This dissertation is dedicated to you. I hope I inspired you to follow your educational goals and be empowered as a competent and capable young woman.

Micah, my dear son. We shared many days together on our computers for school during this past year. You have matured from a boy, when this all started, to a competent young man. I am so proud of the kind, grounded, and curious person you have become. This dissertation is also dedicated to you. I look forward to many more lessons together.

My family: Mom and Dad, the Becchettis, and the Smeltzs. Thank you for tolerating your liberal, Gen X, free-spirited, bohemian daughter/sister/aunt. We are a special family. Although you may not agree with many of my choices, I know that you deeply love and support me. I love you all!

My Flagstaff family: Vanessa, Allison, Jaden, Carrie, Jack, Abby, Erika, Maggie, Jim, and Annie. Thank you for believing in me and supporting me throughout this entire journey. You listened to my PhD woes and joys while we drank cocktails and wine, walked in the forest, sat in the hot tub, and camped at the lake. I am so grateful to call you family.

My girls: Roz, Nic, and Stacey. Your unconditional support and love are beyond words. May you each continue your journeys toward finding Faith, Simplicity, and Wholeness.

The Innovator Team and Key Informants: Emmie, Michele, Lily, Deb, Laura, Kate, and Georgia. Thank you for sharing your time, expertise, and resources with me. I appreciate your willingness to help with this project.

Jamili, colleague and fellow seeker. Thank you for your partnership and trust in my vision. More than any other, I truly would not have been able to do this without you.

Baja 4 and participants. Thank you for your adventurous attitudes and willingness to allow me to study your conglomerate. Your bright Southern Arizona sun shone much light on my ideas about UU faith formation.

My Committee: Lize, Lem, and Joe. Lize, I am grateful for your tenacious encouragement. You challenged me beyond what I thought I could endure with grace and steadfastness. You are brilliant. Thank you for your patience and believing in me and keeping up with my "breakneck speed." Lem, I am grateful for your willingness to take me on despite your newness to Antioch and your busy life. I am honored to have gleaned some wisdom from your life of experience in education. Joe, you have walked beside me on this doctoral journey as a mentor, fellow congregant, and friend. Thank you for the long conversations and guidance about my research, writing style, and role as a religious professional leader in Unitarian Universalism. Your unique perspective as a UU and educator were invaluable. You have taught me so much…these are just

a few of my favorite gems of Joe wisdom, "Have courage to discover, take time to incubate, be radical and get to the root of it, give yourself permission to make shit up, and always remember to do what you love."

In closing, I am inspired by the words of Rising Appalachia's 2018 song "Resilient," I carry on with my writing, leading, loving, and life.

I am resilient

I trust the movement

I negate the chaos

uplift the negative

I show up at the table again and again and again

I close my mouth and learn to listen.

Blessings, Shanti, Ashay, So much love. Amy

Table of Contents

List of Tables

List of Figures

List of Supplemental Files

All files are available as independent supplemental files.

Huntereece 2021 Dissertation Abstract Video

Description: Video providing an overview of the dissertation

File type: MP4

File size: 3.9 MB

Length: 00:02.23

Chapter I: Introduction

There is an outcry by religious education (RE) professionals for a new model for RE in the Unitarian Universalist (UU) church that promotes programs and curriculum that are meaningful to the modern family, attainable with modern technology, and self-sustaining. A movement to rethink and restructure the current models is warranted. This is a movement that needs leadership willing to evaluate the elements of congregational heritage, keep what is helpful, and let go of that which no longer serves congregations. Such an approach to leadership is an adaptive approach and one that cannot be done alone. In addition to adaptation, a movement to reconfigure the RE curriculum in the UU church must also involve collaboration. Successful collaboration in the spirit of shared ministry draws on congregational insight, support, and trust. This is the work of many heads, hearts, and hands. Leadership must explore the shift in families' expectations about faith formation and propose solutions to implement a new model.

Background of the Problem

There are significant shifts in the field of RE in the UU church and effective leadership must explore families' needs, desires, and expectations regarding faith formation and propose solutions toward a new model. Attendance in UU RE has declined. Families generally do not prioritize Sunday morning spiritual development of their children as they did even three decades ago. Participation in programming is intermittent, and the need for volunteers to sustain a program is far greater than the number of those interested and able to volunteer. Sweeney (2017) recognized this conundrum over a decade ago and began the work needed to raise awareness of ineffectual pedagogies and to promote solutions for families. Sweeney suggested that this work requires taking account of the demographic, logistical, and sociocultural factors and influences, causing upheaval in the RE community.

Demographic forces have impacted RE attendance, volunteer availability, and structural/organizational options. Baby Boomers, those born between 1946 and 1964 (Dimock, 2019), were the product (literally) of a generation that enjoyed unprecedented economic opportunities following a devastating economic depression and world war. The baby boomer generation numerically overshadowed those generations born previously. Consequently, as baby boomers had children themselves, many adults were available to serve as religious education volunteers in the church. In the current context, as baby boomers have become the church elders, many who served as RE volunteers a decade or two ago often have their interests focused elsewhere. Yet, many elders may have fond childhood and parenting memories in congregations overflowing with families and enthusiastic Sunday morning RE activity. Elders, many of whom now serve in church leadership, may wonder why parents in the succeeding generations, Gen X and Millennials, appear to be looking for alternative RE models. A new approach to programming in RE included educational opportunities that can guide adults in the church about generational differences and preferences and provide guidance for parents as teachers and *does not* shame today's parents for their apparent lack of participation, interest, and desire to raise spiritually aware children. A new program encouraged parents to move away from striving for *perfectionism* and empower them to discover and develop their unique spiritual gifts and strengths so that they can leverage them to develop a *process* for meaningful and impactful spiritual experiences for their children.

Logistically speaking, the new volunteer pool is made up of Gen Xers, those born between 1965 and 1980, Millennials, those born between 1981 and 1996 (Dimock, 2019), and the threshold microgeneration, Xennials, those born between 1977 and 1985 (Lebowitz, 2018), that straddles between Gen X and Millennials. Today's parents are frustrated with finances and

busy schedules due to custody, extracurricular activities, and academic work. A new approach to programming in RE fulfilled the modern parents' desire to educate their children in world religion and emphasize a healthy spiritual life and did *not* require their consistent presence, monetary contribution, or time commitment. This required the congregation to shift from *competing* for parents' time and money to intentionally establishing a supportive, interconnected *community* that encourages parents and creates a sense of attainability for their goals for their children's spiritual development.

Socioculturally speaking, modern parents have different priorities and expectations of themselves and the programs in which they engage their children than preceding generations. A new approach to programming in RE was consistent with modern technology and did *not* heavily rely on a few volunteers (or any at all) to fulfill all the needs all the time. This required the congregation to shift from burning out and *martyring* willing helpers to maintaining sustainable, innovative solutions that bring joy and fulfillment to all involved.

Problem Statement, Purpose, and Scope of Study

Problem Statement

According to Sweeney (2017) and as discussed above, the model of religious education in the late part of the 20th century has now frayed and unraveled. This outdated model separates families on Sunday mornings with adults attending church services and children funneled into RE classrooms. The classrooms are separated by grade, and an age-specific curriculum is presented that is carried over from one week to the next. Structuring a religious education class that depends on attendance weekly is not attainable for families or sustainable for RE programming. The model also relies on volunteers heavily. Volunteers are few, and those that are willing are often overcommitted. Dependency on volunteers to run a program is no longer

applicable to modern families' needs or realistic within the confines of most congregations' volunteer pool. This old model needs some refreshing.

Purpose of the Study

The purpose of this study is to explore the attitudes and opinions of parents about the need for change in the UU RE models that are currently in use in their congregation. This research provided a means for a team of innovative religious professionals to use action research to refresh the old model for religious education and create new faith formation possibilities for UU families. As a leader in this movement, I propose this dissertation research to serve as a beginning of a broader and ongoing empirical approach to finding answers to our questions and issues related to faith formation in the UU church.

Scope of the Study

The scope of the study is to get firsthand knowledge about the Gen X and Millennial UU parents' expectations about the religious education program in their UU congregation in Southern Arizona.

Overview of Research Questions

The primary research question and three sub-questions align with the corresponding themes that emerged from the preliminary exploratory study and the goal to redefine engagement in RE programming in the UU church.

Primary Question

How could UU RE professionals more effectively engage families in faith formation opportunities designed to meet the desired outcomes of UU parents/caregivers?

Sub-Questions

1. What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents'/caregivers' needs, desires, and expectations of these offerings?

2. What multigenerational and UU parenting faith formation opportunities are offered in RE programs?

3. What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their articulated needs, desires, and expectations that will help make RE programs more sustainable?

Significance of the Study

This research is important to conduct because there is a widening gap between what is offered in UU RE programs and understanding parents' expectations of the UU RE programs. I want to redefine what engagement means in religious education in the UU church, then find solutions to current concerns that are meaningful, attainable, and sustainable for today's parents to incorporate spiritual development opportunities into their children's lives in the UU religious education programs. This research is also important to me as a researcher and to my team of innovators that participated in the action research. This research can uniquely contribute to our understanding of the perspective gap. Based on a preliminary exploratory study, there is evidence of a gap between what is offered in UU RE programs and what the parents need, want, and expect. The results of this dissertation study highlighted firsthand knowledge of what modern parents needed in a new, innovative RE program within the context of four congregations in Southern Arizona. The innovator team and I then developed engagement ideas for struggling religious professionals and families. These new engagement ideas provided a new vision for leadership during this time of dissonance between what is offered in UU RE programs

and what the parents need, desire, and expect. The data produced from this study revealed gaps that existed in RE models, focused on specific needs and desires of UU parents through selected interviews, redefined engagement, and determined the effectiveness of a new UU RE program assessment scale that was tested in the research.

Theoretical Underpinnings

This research project's theoretical underpinnings come from modern psychosocial perspectives, spiritual development, pedagogical indications from faith development religious professionals, and leadership theories that focus on relationships and organizational change.

I chose theories, perspectives, and indications that aligned with the three main themes for this research and how they inform the need for a paradigm shift within religious education in the UU church.

The first theme is Millennial and Gen X parenting. I highlight three scholars' perspectives on how they consider the implications of generational identification on life decisions, including Strauss and Howe (1991) in their generational cohort theory, Putnam (2000) in his perspectives on the significant and detrimental changes related to voluntary participation in activities in the United States of America in the last several decades, and Nieuwhof (2015) in his perspective on cultural shifts and how that is affecting church attendance.

The second theme is lifespan religious education. I discuss UU RE through a family ministry lens (Kadlecek, 2018) and uplift the support of UU parents in their faith formation (Finser, 2001) as well as taking on the role of the primary religious educator (Klink, 1972). I emphasize the importance of community support (Berry, 2018; Bordas, 2012). Last, I explain the significance of anthroposophy and the 12 Senses theory by Steiner (1986).

The third theme is pedagogical indications for engaging in faith formation opportunities. I highlight several religious professionals' (of different faiths) contributions in efforts to seek solutions to the troubling frustrations involved with engagement in faith formation opportunities in the church. They include innovative methods recommended by UU religious professionals like Full Week Faith by bellavance-grace (2013), the Binghamton Project by Kadlecek (2018), and methods recommended by religious professionals in other faiths like Think Orange by Joiner (2009), and Lifelong Faith by Roberto (2015).

The two leadership theories that I focused on, adaptive leadership by Heifetz et al. (2009) and collaborative leadership by Chrislip and Larson (1994), provided the leaders in UU RE a guideline for how to best redefine engagement and shift the paradigm to produce a more meaningful, attainable, and sustainable program for the modern parent.

Defining Key Terms

Action research team — a group of people who individually bring expertise and experience to an action research study. For the sake of this study, the action research team is called the innovator team.

Baja 4 — a conglomerate of four UU congregations in Southern Arizona, including Mountain Vista Unitarian Universalist Congregation (MVUU) in Tucson, Borderlands Unitarian Universalist Congregation (BUU) in Amado, Sky Island Unitarian Universalist Church (SIUUC) in Sierra Vista, and Unitarian Universalist Church of Tucson (UUCT).

Modern UU parents were born after 1965 and before 1996. In 2021, the oldest parent is 56, and the youngest is 25. These years demarcate the boundaries of two generations, X and Y (Millennial) (Dimock, 2019).

Paradigm shift: Paradigms are "a set of beliefs, morays, practices, assumptions, that define the boundaries and tell you how to succeed within the boundaries" (Jones, 2020). When there is a paradigm shift, the defined boundaries have become dysfunctional, outdated, or unsustainable, and a change is needed.

Methodological Approach and Research Design

This research was a qualitative study using an action research methodology in a case study format. Lewin was the founding father of action research. Lewin (1997) emphasized the twofold nature of research. He was concerned about how social sciences traditionally depended on scientific research related to a large, generalized group with specific laws. He pointed out the need for increased awareness of social scientists to look closer at the individual situation and its conditions. He developed a method to guide the researcher to focus on the individual situation and its conditions with care. The primary researcher guides the research process through a spiraling iterative cycle of four stages: planning, acting, observing, and reflecting. That spiral of steps reiterates as new knowledge is acquired from the previous stage. Action research also involves a team of participants who are involved in the topic of research. The team is empowered to collaborate, gather qualitative data, and affect change in their situation from what is learned from their research.

In this study, I implemented a research design with three phases (interviews, new engagement pilot program, focus group). I expanded the action research team of innovative religious educators who worked with me in my preliminary exploratory study. They collaborated with me on the interpretation of the data and the new engagement pilot program. I wanted to specifically identify Gen X and Millennial parents' needs, desires, and expectations related to engagement in the current RE methods used in their congregations. I conducted interviews with

participants until saturation was reached. As expected, saturation was reached within seven interviews. The data from interviews provided insight into RE programming and specifically concerning Gen X and Millennial parent participants' expectations and gaps, types of multigenerational offerings, and alternative engagement approaches. The action research team was comprised of other religious professionals and key informants. I used Rubin and Rubin's (2012) guidelines on how to analyze data. Key concepts and themes were identified and reported back to the innovator team. The innovator team assisted with the analyzing process to ensure credibility and mitigate researcher bias. They reviewed the data while considering the determined key themes and subthemes, as well as recognizing any other themes I missed. Then, the emerging themes were revisited in the interview transcripts and a frequency count was conducted.

Together we made meaning of the data from the interviews. The new engagement pilot program was a result of the synthesis from the interview data. I tested the new engagement pilot program for three weeks. Separately and simultaneously, the innovator team assessed 20 engagement opportunities in the new engagement pilot program with the Assessment of Learning Families in Faith Formation, or ALFIFF. This evaluation gave the RE professional the ability to assess the faith formation engagement idea within the new pilot program based on whether the engagement idea includes key concepts of the 7 UU principles and Rudolf Steiner's 12 senses. Then, the innovator team met with the participants for one focus group and discussed their experiences with the new engagement pilot program. After the focus group, I did a deep read of the focus group transcript and scanned for additional ideas and comments which could contribute to a future iteration of the pilot program. I then included those additional comments in Chapter IV.

Researcher Positionality and Perspective

As an experienced teacher, I have deeply considered the impact that the pedagogical style has on the learner. I have worked with people of all ages in many different learning environments and followed objectives and methods created by public (government) and private (Catholic, Waldorf, and Unitarian Universalist) curriculum developers. In many cases, I see intentions and goals fall short of the needs of the learner. I notice that either developmental appropriateness is not factored in or pedagogical indications from the previous century have not been updated considering changes in culture and the modern way of life. I acknowledge that learners have various needs and acquire knowledge with different preferences and that there is no one best way to educate. However, I also acknowledge that an interrelationship exists between the learner, the teacher's intention, and the choice of pedagogy. The opportunity that can be created when learner, teacher, and pedagogy are harmonious can seem magical. Durkheim (1912/2001) referred to that magic as "collective effervescence" and claimed that when it occurred, it could inspire and stimulate individuals and groups to work toward creative change (p. 158). I seek those magical moments in a learning environment, both for myself as an educator and for other educators. Those magical moments drive my curiosity about how I can influence other educators to implement engagement opportunities in faith formation.

I hold the beliefs of a post-structuralist worldview embedded in an ontology that espouses a belief that there are many paths to finding one's truth, which may differ from others' truths. Ontology is a belief system that guides the way we think about and do research. The way I express what I think about others' behavior and life circumstances are represented with the language I use, social practices I participate in, and my ontology, the source of knowledge (Pringle & Booysen, 2018, p. 26). These aspects of my positionality are consistent

with UU beliefs which advocate that there are many truths. Our experiences, identities, and worldviews are constructed through our discourses. As a UU religious professional, I am shaped by epistemological assumptions in which the world and my knowledge of it is created by social and contextual understanding. For me, that is expressed in the seven core UU principles. As a researcher, I recognize that my beliefs influence my understanding of my participants, data collected, and decisions about the methodology I choose. These choices have led me to feeling most comfortable with qualitative research. I do not see this as a limitation to my research, but instead, as a boon.

The examination process is done through reflexivity. Bourke (2014) clarified reflexivity as "involv[ing] a self-scrutiny on the part of the researcher; a self-conscious awareness of the relationship between the researcher and an 'other'" (p. 2). For this research project, reflexivity is included in the iterative process of inquiry. So, my perspective on the participants, data collection, and decisions about the action plan will be well thought out.

I believe that my participation in graduate studies through the Leadership and Change program at Antioch University has given me a unique perspective on UU RE and the role I play as a scholar/practitioner in the field. That perspective is of an insider. My religious education experience is valuable to bring to the discourse on the future of faith formation in the UU church.

Ethical Aspects of Research

I used Google forms and created a "Consent to Participate" form. The Consent to Participate form included a link for the PDF entitled "Consent Form" (See Appendix D). I distributed the "Consent to Participate" form in an email to all participants before collecting any data from them. Responders reviewed the "Consent Form," then typed their name and date in the "Consent to Participate" form as an acknowledgment of their willingness to comply with the

expectation described in the "Consent Form." I utilized the expertise of an innovator team to assist with this action research project. As the primary researcher, I guided them through the phases of the study and made all final decisions regarding participant recruitment, interviewing, data interpretation, new engagement model development and implementation, and focus group facilitation. As the innovator team, they provided input and expertise in areas concerning curriculum and implementation.

Study Assumptions

Assumptions associated with the research related to participants, UU religious professionals leading and teaching in RE programs, and UU RE programs:

1. As a Unitarian Universalist researcher, I assumed I had an advantage because I connected personally to the participants and the context of my research. I relied on the participants' responses and assumed they were accurate and honest in their explanation of their perspectives, which were informed by their own worldviews.

2. I assumed that the participants willingly volunteered because they were interested in the study and considered it legitimate. I assumed the participants viewed me as an expert on the topic of faith formation in the Unitarian Universalist church. I assumed that many modern parents led busy lives and did not trust the church. This led to their reluctance to commit to RE weekly programming in which lessons built on each other. I assumed that modern parents preferred to keep their children with them in worship and did not want concurrent worship and RE programming. I assumed that modern parents desired engagement opportunities in technology-friendly ways that they accessed in their own time. I assumed that modern parents were the best primary religious educators for their

children and that they desired parenting classes on how to raise children in the UU

tradition.

3. I assumed that RE professionals were frustrated with the old RE model. RE leaders were

eager to implement a new innovative design in programming. RE leaders and teachers

were responsible for the success of a program. I assumed that most Gen X and Millennial

congregants (the current volunteer pool) did not have time or desire to volunteer in the

RE program. I assumed that most Baby Boomers did not want to volunteer in the RE

program anymore.

4. I assumed a paradigm shift in RE programming was needed and wanted in most

congregations. I assumed that shift needed to include increased opportunities for parent

education and multigenerational learning. I assumed it was difficult to find volunteers to

sustain a program. I assumed worship and RE occurred simultaneously in most

congregations.

5. I assumed that I was capable and prepared to lead an action research study, gather

sufficient data, extrapolate meaning, and synthesize the data to redefine engagement in

UU RE. I assumed action research took me in a direction that best explained my research

and promoted a powerful, generative format for future applications.

Study Limitations

Limitations of this study will be:

1. Transferability: Qualitative research and, specifically, action research pose issues with

transferability, and the delimited design will need to be clearly explained. The outcome

goal of this project was to redefine engagement in the Baja 4 RE program specifically, so

the innovative ideas and the findings apply to the specific research site.

2. Case study interview questions: The interview questions in Phase I could be worded in such a way that would lead the participants to think a particular answer is the prescribed outcome. Efforts to avoid that issue were taken with the innovator team by discussing and reflecting on questions for several weeks before finalizing the format. The findings were reported with accuracy and considered any participant answers that may have resulted from a misunderstanding.

3. Imposing strict criteria for participation in this study prevents me from collecting needs, desires, and expectations about the RE program of parents in the Baja 4 outside of the selected group.

4. Attempting to propose an innovative new engagement plan for the Baja 4 RE program during a time of uncertainty and frequent change (COVID-19) poses a limitation to this study.

Structure of Chapters

Chapter I: Introduction

This chapter provides the background, purpose, problem, scope, and significance of this research study. The research questions and methodological approach are introduced and explained. The theoretical underpinnings provide insight for Chapter II. Positionality, ethics, assumptions, and limitations are considered, and definitions for terms in the study are provided.

Chapter II: Critical Review of Relevant Theory, Research, and Practice

This chapter presents a rhetorical argument regarding the need for a paradigm shift within religious education in the UU church. I considered three main areas of literature and showed how they inform the need for a paradigm shift within religious education in the UU church. Three

main areas discussed are Millennial and Generation X parenting, lifespan religious education opportunities, and pedagogical indications for engaging in faith formation opportunities. Additionally, consideration of the contribution of historical and current underpinnings of the issues, foundational principles of Unitarian Universalism, and the two leadership theories considered in this study, namely adaptive leadership (Heifetz et al., 2009) and collaborative leadership (Chrislip & Larson, 1994).

Chapter III: Methodology/Guiding Questions and Research Procedures

This chapter explains the framework, methodology, and design of the research study. An explanation of the research approach, action research, context of the study, and how that will be applied to a specific case study is explained in detail. Specifics about recruitment and selection of the participants and the study design details are delineated.

Chapter IV: Findings of This Study

This chapter presents the findings from interviews, data collection from the pilot program, and a focus group.

Chapter V: Discussion

This chapter discusses the findings from the study, implications for leadership and further research, and a reflection piece.

Chapter II: Critical Review of Relevant Theory, Research, and Practice

Introduction

Content of the Review

The notion of faith formation in the UU church is a broad one. This chapter reviews the literature and leadership theories, namely adaptive leadership (Heifetz et al., 2009) and collaborative leadership (Chrislip & Larson, 1994), relevant to the three main areas of consideration for this research and how they inform the need for a paradigm shift within religious education in the UU church. Based on a preliminary exploratory study which considered participants' attitudes regarding satisfaction with current religious education offerings in their congregations, the three main areas of consideration that surfaced were Millennial and Generation X parenting, lifespan religious education opportunities, and pedagogical indications for engaging in faith formation opportunities.

Gaining a baseline understanding of how the three main areas of consideration and the two leadership theories influence and inspire action toward a paradigm shift in UU RE from this literature review is foundational to this research.

Organization of the Review

First, I considered the extant research that was relevant to the three main themes for this research. I began with an explanation of the Golden Circle change model (Sinek, 2009).

Next, I reflected on the historical and current underpinnings of the issues that impact this dissertation research. While there is broad agreement that faith formation programming in UU congregations must continue, views differ on the old models and curriculum's viability and sustainability. I discussed Fahs's New Beacon Series (1937), MacLean's (1951) model, the

Unitarian Universalist Association (UUA) Tapestry of Faith (2000), and Sweeney's (2018) ideas about paradigm shifts in religious education.

Then, I examined the role of psychosociological influences on parents, specifically generational identification, and parenting. I explored the relationship between how parents who identify as Gen X (born 1965–1980) and Gen Y/Millennial (born 1981–1996) (Dimock, 2019) experience gaps in their religious education programs because of what they expect from a program is different from what is offered. Numerous scholars consider the implications of generational identification, including Strauss and Howe (1991), Raines (2003), and Putnam (2000). I considered the following questions:

1. How does generational identification influence one's perspective of and participation in engagement in UU faith formation?

2. What makes parents want to remain engaged or fall away from RE programming?

Then, I explored lifespan religious education and acknowledged the role of non-UU upbringing, community, and Steiner's (1920/1986) 12 senses theory. I considered the following questions:

1. What is the vision that religious educators need to hold while creating a new model for religious education?

2. How can religious professionals harness the power of community to increase engagement in faith formation opportunities?

3. How does the cognizance of Steiner's (1920/1986) indications about the 12 senses contribute to a more receptive, spiritually developing human being?

I continued to look at literature related to current pedagogical indications for engaging families in faith formation opportunities. There are numerous religious professionals (of many

faiths) currently seeking solutions to the troubling frustrations involved with engagement in faith formation opportunities in the church (bellavance-grace, 2013; Joiner, 2009; Kadlecek, 2018; Roberto, 2020). In this discussion, I considered the following questions:

1. What influences the pedagogy related to faith formation?

2. How can religious professionals offer alternative approaches and opportunities to parents that are sustainable and create a robust RE program?

Last, I explored the conceptual and theoretical leadership frameworks that are relevant to this research. I provided detailed information of the two leadership theories that are fundamentally informative in redefining engagement in faith formation opportunities in the UU church. The two leadership theories are collaborative leadership (Chrislip & Larson, 1994) and adaptive leadership (Heifetz et al., 2009).

Foundations of Successful Change

Recent personal conversations with other UU religious educators, regional meeting agendas, and conference workshops have tended to focus thematically on guidance regarding how to provide meaningful, attainable, and sustainable faith formation opportunities to UU families interested in faith formation (Berry, 2018; Sweeney, 2017). Despite differences in religious beliefs, professionals from other religions have turned their attention to similar concerns (Bolsinger, 2015; Joiner, 2009; Nieuwhof, 2015). Related to religious professionals' concerns, I have identified the foundational organizational developmental work of some leadership scholars that is necessary to address concerns related to providing meaningful, attainable, and sustainable faith formation opportunities to UU families interested in faith formation (Bordas, 2012; Sinek, 2009). The foundational organizational development work entails an honest look at the mission, vision, and method of engagement of the organization, or in

this case, congregation and RE program. Change can only be successful if there are a widespread understanding and agreement among community members on those three foundational pieces (Nieuwhof, 2015).

Sinek (2009) based his work on the Golden Circle. The idea of the Golden Circle is that people are motivated to change most when inspired by the organization behind the change. The inspiration comes from understanding *why you do what you do*. What you do is the mission of an organization. Sinek's work relates to this research because congregations can get behind that and act from an informed, grounded place when congregations are clear about why they exist. Sinek supported the notion that starting any organizational change by clarifying its mission is paramount and will result in the most cooperation from the people involved. Regarding the work of shifting the paradigm of UU RE, making RE meaningful for Millennial and Gen X parents must be a primary element in the mission of those who want to change (Nieuwhof, 2015).

The vision of an organization answers the question: *What are we doing this work for*? What you are doing is the vision of an organization. Regarding the work of shifting the paradigm of UU RE, making RE attainable by empowering parents as the primary educators and the congregation as a supportive community, then, providing an appropriate curriculum for many stages in life must be a primary element in the vision of those who want to change (Klink, 1972).

Defining those two concepts, mission and vision, clearly will lead an organization to a better understanding of *how we can best engage families in faith formation opportunities*. Regarding the work of shifting the paradigm of UU RE, making RE sustainable by providing alternatives to how families engage in faith formation opportunities must be a primary concern of those who want to change (Berry, 2018).

Getting clear on those three questions, *why, what, and how*, forms the foundational steps to any organizational change.

In this literature review, I discuss the relevant literature in each of my key research themes, which also relate to those three essential questions for change within an organization.

Historical Background and Context of UU Church

An increased interest in engagement methods of faith formation in the Unitarian Universalist (UU) church has emerged in recent years. A disjuncture exists between the needs of modern families and the method of engagement. Many religious professionals have recognized the need to change the paradigm in religious education (RE) to better respond to this disjuncture (bellavance-grace, 2013; Joiner, 2009; Kadlecek, 2018; Roberto, 2020). One religious educator noted, "We [are] discovering that the Sunday School model is not just limiting for some of us, it is becoming impossible" (Kadlecek, 2018, p. 2).

Old models of religious education developed in the early 20th century accommodated many Traditionalist and Baby Boomer parents (Walton, 2003).[1] In 1909, the American Unitarian Association (AUA) developed "the Beacon Series" for religious education in the Unitarian church (Walton, 2003, p. 64). "The Beacon Series" introduced a then innovative, age-segregated curricular structure.

About the same time a young mother and liberal religious educator, Sophia Fahs, developed her initial ideas about children and faith formation. Her curricular innovations had a tremendous impact on the traditional approaches to religious education. Fahs questioned the Bible-centered lessons typically taught in Sunday school. She believed, rather, that the natural

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[1] According to Dimock (2019), generation birth year spans are as follows: Traditionalists were born between 1928 and 1945; Baby Boomers were born between 1946 and 1964.

sciences could guide children's inner curiosity in their faith formation. Fahs believed religious educational curriculum should create opportunities for children to freely discover and respond to the natural world around them. In this way, children could begin to develop their own sense of God.

In 1923, Fahs entered the Union Theological Seminary and further developed and shared her innovative ideas about religious education (Hunter, 2020). She field-tested her experimental ideas in religious education theory and methods at several places, including her alma mater, the Union Theological Seminary, Columbia University's Teachers College, the Union School of Religion, and the Riverside Church School (Andrews, 2020). At about the same time, Unitarians were looking to reform religious education and grow membership. The then newly appointed president of the AUA Rev. Frederick May Eliot invited Fahs onto staff as the editor of children's materials for the new religious education project (Walton, 2003, p. 64).

As Children's Editor, Fahs spearheaded efforts to update the age-segregated Unitarian religious education curriculum and model. In 1937, she offered the New Beacon Series, a child-centered approach based in world children's literature focused on one goal: "'We wish children to come to know God directly through original approaches of their own to the universe'" (Walton, 2003, p. 64). The Traditionalist Generation, parents of the post war Baby Boomer Generation, received the model well and Fahs's new vision for religious education influenced the membership growth of Unitarianism in the post war times (Walton, 2003, p. 64).

Meanwhile, a different but similar denomination, Universalist, was also revitalizing their religious education curriculum. They emphasized the friendly Jesus, and most lessons focused on social justice from a Christian perspective (Forsyth-Vail, 2020). Angus MacLean, a progressive Universalist religious educator from 1946 to 1960 (Forsyth-Vail, 2020; Harvard Square Library,

2020), spoke about discovery learning as a strategy to instill relevance in the religious education curriculum. He believed that "education must be relevant to the child, the church, and the problems of the world" (Harvard Square Library, 2020). His proposed education methods conveyed the relevant message, as is portrayed in his famous quote: "The Method Is the Message" (Harvard Square Library, 2020). Maclean's educational philosophy was consistent with and reflected John Dewey's (1938) ideas about education. Dewey's (1938) philosophy centered on the value of reflection on lived experiences as an essential catalyst to deeper learning. Wergin (2020) explained that, "for Dewey, *experience* is more than just participating in events; it is active interaction with one's environment in a sort of dialectic that results in change on both sides" (p. 74). MacLean's Deweyan child-centered inclusion of real-life community experiences in his religious education curriculum ushered in the opportunity for growth and change in the child, the family, the congregation, and the community.

In the early 1950s, conversations about merging Unitarians and Universalists began. Both churches suffered loss in membership from World War II and the Great Depression. Healing and revitalization were needed, and new, young ministers were called to do the renewing work. With offices across the street from each other, soon Unitarian Fredrick Eliot and Universalist Robert Cummins recognized similarities in their missions and initiated collaboration (Cummins, n.d.). After much debate and discussion, the union became official a decade later in 1961and Unitarian Universalism was created. The newly combined association of two churches developed a curriculum that steered away from the traditional Bible study. The new curriculums included a focus on love (God Is Love), character development (Character Counts), progressive education, contextual, collaborative science-based concepts, multiple sources of wisdom, and deeds, not

creeds (Forsyth-Vail, 2020). By 1964, several community-centered curriculums for multiage involvement and recognition of lifespan milestones existed.

As technology developed, the internet offered opportunities to share the curriculums widely. These curriculums were compiled and organized on the Unitarian Universalist Association's website and named the Tapestry of Faith. The intent of the Tapestry of Faith curriculum, available to religious education professionals as well as to families, was to define and support the growth and learning of UU religious education in a highly accessible format (UUA, 2020b). Curriculum developers designed most Tapestry of Faith curriculum with the plan to deliver the lessons in the Sunday school setting. This typically included intentional age segregation, classroom settings, and usually occurred live on Sunday morning.

Again though, at the beginning of the 21st century, there were noticeable trends of decreased enrollment in religious education programs (UUA, 2020a; Walton, 2018). UUA reported (2020a), participation in UU RE programs decreased by 33% between 2009 and 2019. Total UU membership enrollment declined by only 6% (UUA, 2020a). Despite this trend, many contemporary religious professionals and church leaders (mostly Traditionalists and Baby Boomers) insist on perpetuating the Unitarian religious education model that began in 1909 and whose basic structure of age-segregation and Sunday morning programming had not changed since. The structure, predictability, and fond memories of their own, or their children's, involvement in similar programming serve as the driving forces behind the current resistance to change. Acknowledging the disconnect between the old programming models and modern parents creates an uncomfortable sense of vulnerability for ministers, religious education professionals, and church leaders. Yet, ignoring the evidence of this disconnection leads to continued but failing efforts to recruit volunteer staff, continued but failing expectations

regarding family participation in Sunday religious education, and continued but failing commitments to outdated and less than meaningful curriculum. There are, however, innovative religious educators who advocate for a paradigm shift that responds to the changing needs of families (L. B. Brown, 2018; Kadlecek, 2018; Sweeney, 2017).

The decline in volunteerism began subtly in the 1960s as evidenced in the emerging collapse of civic and community-related involvement in American social institutions. This trend grew into the mid-1980s when the oldest Gen Xers[2] were rising as parents (Putnam, 2000). Putnam and his colleagues discovered that regardless of the type of civic organization, "rapid growth to the 1960s abruptly halted, followed by rapid decline" (p. 57). This dismaying trend accelerated further after 1985. Between 1985 and 1994, active involvement in community organizations in this country fell by 45%. Nearly half of America's civic infrastructure was obliterated in barely a decade (Putnam, 2000, p. 60). The decline in civic and institutional involvement since the 1960s was part and parcel of a number of social and cultural shifts impacting American families and their patterns of social engagement. Although change is expected, necessary, and widespread, an abrupt change that affects society's foundation and civic engagement is hugely concerning. The reasons for these shifts could be attributed to several sociological and cultural trends that affected the family dynamic at the end of the 20th century.

There were several sociological shifts in the American family in the 1980s. Sociological changes in family size, changing gender roles, and concomitant shifts in economic pressures and responsibilities impacted the Gen Xers' perspective and outlook as they developed into adult members of society. The average size of a family in the USA decreased from 3.58 people in

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[2] According to Dimock (2019), Gen Xers were born between 1965 and 1980.

1970 to 3.23 in 1985 (Duffin, 2019). Browning et al. (2000) reported that 27% of all children in

the late 1980s lived in single-parent households, mostly led by mothers. Parents had less time to

contribute to volunteerism because other responsibilities took precedence. "According to the

Bureau of Labor Statistics, 75 percent of all mothers whose youngest child was under age

eighteen were employed outside the home in 1992. Fifty-five percent of those with children

under three years worked for wages" (Browning et al., 2000, p. 55). Naturally, this would explain

why Traditionalist parents spent more time with their children than today's modern parents

(Browning et al., 2000). The workforce percentage increased by approximately 15% between

1970 and 1980 (Goldin, 2006). Additionally, the costs of basic needs such as housing changed

dramatically as well. The USA's median home value increased by 42.9% between 1960 and 1970

but jumped to a 177.6% increase between 1970 and 1980 (Martin, 2017). Cancian and Reid

(2009) summarized the contributing factors to sociological shifts in America and said, "the past

40 years have been a period of increasing diversity in family structures and changing

relationships among marriage, fertility, and employment" (p. 25).

As the sociological structures changed, there were also noticeable cultural shifts. Most

notably, the American cultural landscape embraced a dramatic ideological shift from

collectivism to individualism, revealing a media and advertising focus on an emergent "me"

generation. Yet, at the same time, the "me" generation exhibits qualities that promote

independence and criticality. The perspective of life changed from a "we" mentality to a "me"

mentality. Gen Xers, it is reported, prioritize self-reliance and exhibit a skeptical outlook on life

(Raines & Arnsparger, 2010). Millennials[3] have an ambitious work ethic and a hopeful outlook

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[3] According to Dimock (2019), Millennials were born between 1981 and 1996.

on life. They prioritize balance, meaning, and freedom in work and personal life (Landrum, 2016; Raines & Arnsparger, 2010) and are often reluctant to commit to a cause or organization due to a lack of trust (Pew Research, 2014). Fromm and Vidler (2015) suggested Millennials value customized, individual, and unique experiences to create a new way of life. They seek experiences that can deliver "*personalization, democratization,* and *casualization* [italics in original]" (Fromm & Vidler, 2015, pp. 47–48). Millennial parents "don't want to be told what to do; they want to be asked how to do it" (Fromm & Vidler, 2015, p. 47). Overall, Millennials value pragmatism. Pragmatism is a philosophic orientation "rooted in the idea that success is based on how practical something is and how easily something can solve a problem" (Fromm & Vidler, 2015, p. 44).

In this changing contemporary social and cultural milieu, Unitarian Universalism operates in unique philosophical commitments juxtaposed within and between collectivity and individualism as revealed in the Seven Principles.[4] Unitarian Universalism is a covenantal, non-creedal faith. UUs prioritize the Seven Principles as the foundational structure for moral reasoning and community interaction. The inception of the new merger between Unitarians and

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[4] Paula Cole Jones was the initiator of a movement which prioritized awareness of both racial justice and deep multiculturalism in the Unitarian Universalist church. Jones's interest originated from a feeling that UUs needed to renew their commitment to this work, to hold themselves accountable, and to fulfill the potential of their existing principles. In 2013, Jones recruited Bruce Pollack-Johnson, and together they began to explore how UUs could address issues on a systemic level regarding racism and other oppressions. They developed the text for an additional principle (to add to the existing seven principles of Unitarian Universalism) with the help of other anti-racist activists. By 2017, they presented it to the Unitarian Universalist Association and suggested that congregations adopt it as an eighth principle. The eighth principle is: "We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote: journeying toward spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions" ("The 8th Principle of Unitarian Universalism," 2017).

Universalists in 1961 took many hours of discussion until the original six principles' statements were agreed upon (UUA, 2000). The UUA revised the six principles in 1984 with much greater ease and a seventh was added (Ross, 2006). The Seven Principles are stated in the UUA Bylaws and Rules as follows:

> We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote:
>
> 1. The inherent worth and dignity of every person.
>
> 2. Justice, equity, and compassion in human relations.
>
> 3. Acceptance of one another and encouragement to spiritual growth in our congregations.
>
> 4. A free and responsible search for truth and meaning.
>
> 5. The right of conscience and the use of the democratic process within our congregations and in society at large.
>
> 6. The goal of world community with peace, liberty, and justice for all.
>
> 7. Respect for the interdependent web of all existence of which we are a part. (UUA, 2019)

Unitarian Universalists' demographics and values interfaced with the sociological and cultural shifts of the 1980s and 1990s in both complementary and contradictory ways.

According to Unitarian Universalist demographic data from the American Religious Identification Survey (ARIS) and the Faith Communities Today (FACT) Surveys in 2008, UUs are primarily middle-aged (median age 52), married (60%), white (75%), highly educated (53% hold college and postgrad degrees), affluent (54% have income over $50K), and homeowners (81%) (UUA, 2012). They are embedded in a materialistic culture and are susceptible to

consumerism. They honor and uphold the values of individualism and personal choice. These values are evidenced in the fourth principle, which calls each individual to a "free and responsible search for truth and meaning" (UUA, 2019, p. 1).

However, the Seven Principles also honor and uphold the values of collectivism. They call on individuals to act responsibly on behalf of the community, and their goal, as the sixth principle indicates, is a "world community with peace, liberty, and justice for all" (UUA, 2019, p. 1). They acknowledge the connection of all existence and, as the second principle indicates, encourage each individual to accept responsibility for "justice, equity, and compassion in human relations" (UUA, 2019, p. 1). The Seven Principles seek welcoming communities. That is, as indicated in the first principle, they honor "the inherent worth and dignity of every person" (UUA, 2019, p. 1).

UU values supported the community-oriented and dependent RE programming found in UU churches throughout the 20th century; the third of the Seven Principles places an emphasis on "acceptance of one another and encouragement to spiritual growth in our congregations" (UUA, 2019, p. 1). For the purposes of this research, UU values also support the need for change in RE programming. The fifth UU principle honors the "right of conscience and the use of the democratic process within our congregations and in society at large" (UUA, 2019, p. 1). Autonomy, finding personal meaning, and catering to personal preferences are serious considerations for people who value the right of conscience.

The tension within the UU identity related to religious education is palpable. UUs are interdependent and independent; they are whole and divided; they are traditional and progressive; they are profoundly connected and introspective. These dichotomous characteristics cause some UU leaders and religious educators to perceive their challenges to successful RE

programming as simply technical—in need of "fine tuning." Yet, other UU leaders and religious educators may perceive these same challenges as a call for important adaptive and collaborative shifts that require new curricular models and new strategies to support UU families. It is this latter group of UU leaders/educators that this research seeks to support as they embrace and answer the needs, desires, and expectations of modern families. Through these adaptive and collaborative efforts, UU congregations can improve their faith formation programming while staying consistent with their values that honor both community and the individual. The seventh UU principle offers this call for recognition of both the individual and the collective: "respect for the interdependent web of all existence of which we are a part" (UUA, 2019, p. 1).

Sweeney's Paradigm Shifts

As mentioned previously in Chapter I, Sweeney (2018) is one of the UU leaders and religious educators who answered the call for addressing the challenges in UU RE. Sweeney identified three paradigm shifts that religious educators could implement to better suit the modern family in their efforts for sustainable faith formation.

Shift #1 from perfectionism to process. Perfectionism is "a propensity for setting extremely high standards and being displeased with anything else" (Houghton Mifflin, 1985). UU RE parents have felt pressured by congregations to contribute physically and financially (Sweeney, 2018). Additionally, parents have been overwhelmed with personal and professional responsibilities, and although they may desire influential spiritual development for their children, their inability to commit to a structured program has led to shame, which then leads to absence. Shifting from the perceived expectation of perfectionism to honoring their necessary process for fulfillment in this life will empower parents to discover and develop their own unique spiritual gifts and strengths so that they can leverage them to develop their own children spiritually. This

is achieved by positively and lovingly encouraging their own process and meeting them where they are.

Shift #2 from competition to community. Church should be fun and fulfilling, not stressful. Parents need not feel that church is just another thing to do on Sunday morning. The perspective of needing to choose between many responsibilities, extracurricular activities, and family time will create a sense of competition for parents' precious time and introduce stress. Shifting from the sense of competition for attention to embracing parents with community support will allow parents to realize that inadequacy is a universal condition and church is a place to give and receive grace.

Shift #3 from martyrdom to maintenance. Parents who chose to attempt to meet all the parenting expectations imposed on them have felt resentment toward others who did not keep up with them and their unhealthy pace. Allowing space for parents to spiritually grow and personally heal is a task of today's faith formation programs. Shifting from a martyr mentality to fostering an environment that will allow parents to cultivate a spiritual life and not create more unhealthy expectations will encourage parents to maintain realistic boundaries for their families.

I was inspired by Sweeney's (2018) ideas around paradigm shifts and extended them. I developed goal words for each paradigm shift. The goal words for a shift which moves RE congregational perspectives of faith formation programming from perfection to process (shift #1) are *impactful* and *meaningful.* The goal words for a shift which moves congregational perspectives of faith formation programming and opportunities from competition to community (shift #2) are *interconnected* and *attainable.* The goal words for a shift which moves congregational perspectives of faith formation programming and opportunities from martyrdom to maintenance (shift #3) are *innovative* and *sustainable.* Then, I developed an attitude

assessment in a preliminary exploratory study and used the goal words for the three paradigm shifts as a guide to create statements about attitudes of religious professionals, congregational leaders, and parents/caregivers in UU RE programs across the country.

Emergent Themes from Current Literature Relevant to Research Questions

This research project emerged from the preliminary exploratory study. Three main themes emerged from the preliminary exploratory study which I used as a starting point for developing my three sub-research questions (delineated earlier) and to guide my choices in the following literature review. I chose theories, perspectives, and indications that aligned with the three main themes for this research and how they inform the need for a paradigm shift within religious education in the UU church.

Theme 1: Millennial and Gen X Parenting Needs in UU RE

Raising children in the late 20th and early 21st century presented novel and unique challenges to Millennial and Gen X parents. The perspectives and priorities of parents changed due to momentous events that occurred at that time. In 1991, Strauss and Howe recognized the importance of momentous events on human behavior. They developed the generational cohort theory, which argued that significant historical and social events influenced changes across generations and created cohorts (Moss, 2016). The qualifying "age-determined participation" in the significant events became a person's "age location" (Strauss & Howe, 1991, p. 32). They investigated why meaningful historical and social events influenced the perspectives, expectations, and inclinations of individuals who were in their formative years of life during those events (Moss, 2016). The "age location" produces what Strauss and Howe (1991) "call a 'peer personality'—a set of collective behavioral traits and attitudes that later expresses itself throughout a generation's lifecycle trajectory" (p. 32). For this dissertation research, I

investigated the generational cohort theory and the implications generational identification has on parents' perspective of and participation in engagement in UU faith formation.

Definitions of Generations. Dimock (2019) considered significant events of the 20th and 21st centuries and created year milestones for corresponding generations. Significant events that shaped Gen Xers values included the computer revolution, which ushered in global awareness and increased communication possibilities, music and MTV, health vulnerability including AIDS, and the collapse of communism (Dimock, 2019; Moss, 2016). Millennials' perspectives are shaped by war, terrorism, political upheaval (first Black president of the United States of America in 2008), and entitlement to instant access to information (Dimock, 2019; Moss, 2016). Table 2.1 displays the generations, definitions, and year spans.

Table 2.1

Generations Defined

					Generation and Age in 2021
				Born 1997–2012	Generation Z ages 9–24
			Born 1981–1996		Millennials ages 25–40
		Born 1977–1985			Xennials (microgeneration) ages 36–44
	Born 1965–1980				Generation X ages 41–56
Born 1946–1964					Baby Boomers ages 57–75

Note. Adapted from *"*Defining generations: Where Millennials end and Generation Z begins*."* Pew Research Center, Washington, D.C. (2019) https://www.pewresearch.org/fact-tank/2019/01/17/where-millennials-end-and-generation-z-begins/.

Both Dimock (2019) and Moss (2016) recognized the importance of the events and remained cognizant that there were indeed differences among people within generations, and widespread assumptions need not blindly suffice as a description for the entire cohort. Kohn (2014) agreed and argued against widespread categorization of generational cohorts as unique entities. Kohn found evidence dating back to the 8th century that pointed to more similarities in age-specific behaviors than generation-specific behavior. He suggested, "each generation invokes the good old days, during which, we discover, people had been doing exactly the same thing" (Kohn, 2014, p. 10). While remaining cognizant of differing opinions about generation-specific behavior, I concur with Strauss and Howe's (1991) perspectives on cohort

distinctiveness. The current model for religious education in the UU church was developed at the beginning of the 20th century (Walton, 2003). By the time the Baby Boomer generation were parents, the model was in full swing. The model often depended heavily on volunteers and the willingness of participants to be physically present during programming. Volunteerism was not a problem for many Baby Boomers. There were many adults to fill the roles of volunteers in the church, and people enjoyed physically participating in church events as they were able, and they often were (Putnam, 2000). Now though, as Baby Boomers have aged, many of them have found that their interests are focused elsewhere. Many are no longer available to volunteer in the religious education program and may not be physically present.

The new volunteer pool is made up of Gen Xers and Millennials. According to Sweeney (2017), many modern parents prefer to remain with their families in the worship service instead of leaving to volunteer in a concurrent religious education class. There are simply not enough willing adults to staff an outdated, volunteer-heavy Sunday school model. Indeed, the decrease in volunteerism in the United States that Putnam (2000) recognized is similarly seen in UU congregations. L. B. Brown (2018) pointedly noted, "Families with children have become the canaries in the coal mine signaling what we are doing is no longer sustainable."

Nieuwhof (2015) agreed that church leaders need to particularly take heed of the substantial cultural shifts affecting modern parents. Those who ignore the effects that culture is having on the modern parent and their parenting choices will not be able to respond appropriately, and the future of the church work will be in jeopardy (Nieuwhof, 2015, pp. 33–38).

Gen X and Millennial parents have different needs, desires, and expectations of themselves and the programs in which they engage their children. Researchers found evidence

that a decline in church attendance and participation in programming is harming the vitality of the church (Barna & Kinnaman, 2014). Nieuwhof (2015) found that Millennials revealed several major reasons for the decline in church attendance. In Nieuwhof's research, Millennials reported irrelevance (lack of meaning) and leadership issues, including hypocrisy and moral failure. Raines and Arnsparger (2010) pointed out that Millennials put great emphasis on competent and trustworthy leadership. Millennials have a hopeful outlook and place value on open communication, respect, and frequent opportunities to learn in their way. Raines and Arnsparger's (2010) research supported Nieuwhof's (2015) findings on why some Millennials are no longer showing up at church. Raines (2003) identified an alternative to the well-known Golden Rule—"do unto others as you would have them do unto you." An adaptation and more appropriate phrase for Millennials would be the "Titanium Rule—do unto others, keeping their preferences in mind" (p. 34).

It is generally agreed that there is a gap between what many congregations offer as faith formation opportunities and what is needed, desired, and expected by the modern parents. A new model for UU religious education will promote programs and curriculum that are meaningful to the modern family, consistent with modern technology, and self-sustaining. Today's religious education reformation calls for the centering of faith formation in the *mission* of our communities of faith. The reformation called for within Unitarian Universalism asks religious educators to lead in a new way and be extremely cognizant of modern parents' needs, desires, and expectations. Religious educators are invited to engage the entire congregation in faith formation, bringing certitude to the words of UU leader Connie Goodbread, "Faith development is all we do. Unitarian Universalism is the faith we teach. The congregation is the curriculum" (Sweeney, 2017, p. 15).

Theme 2: Lifespan Religious Education

Lifespan UU RE through family ministry lens. Lifespan religious education programming offers opportunities for faith formation at all stages of life. A preliminary exploratory study to this dissertation research considered participants' attitudes regarding satisfaction with their current religious education offerings in their congregations. Responses suggested that participants were open to multigenerational and continuing faith formation opportunities for a lifetime. Most researchers working in lifespan UU RE agreed that support for parents in faith development was necessary and twofold (bellavance-grace, 2013; Kadlecek, 2018; Sweeney, 2017). First, parents need adult educational opportunities that focus on foundational aspects of Unitarian Universalism so that they can develop their own spiritual identity as a UU. Second, parents need guidance and support to be empowered and encouraged to step into the role of primary religious educators for their children.

Formation of one's faith. Parents who take on the role of primary religious educator for their children need guidance and support in UU history, theology, and foundations. Parents need guidance on how to provide a UU home with UU values. Higgins (2008) reported that only 12% of adults in America who identify as Unitarian Universalist were raised in the church. These parents do not have the upbringing and experiences to know how to be a part of a UU family. Strengthening their understanding of UU identity and centering their spirit in love are paramount in their UU faith formation.

Finser (2001) strongly advocated parenting with certainty from a place of faith and love. Finser (2001) pointed out that "external society often seeks to make us content with things that can be possessed; faith leads us beyond. Faith leads, and our inner self is nourished through devotion" (p. 50). Devotion to the formation of one's faith development as a UU emphasizes a

"free and responsible search for truth and meaning" (UUA, 2019, p. 1). Adults who actively pursue spiritual development will naturally hold spiritual development as a goal for their children. Kohn (2014) offered that goals for our children "should include a meta-goal: We want them to be thoughtful enough to formulate meaningful goals for themselves. And whatever they come up with ultimately must supersede our goals for them" (p. 193). So, as a result of aiming for healthy spiritual development for their children, parents need resources and guidance to pursue that goal.

Empowering parents as primary educators. Spiritually mindful adults feel a sense of responsibility to provide opportunities for faith development to their children. Despite the model, the religious educators need to concern themselves with the child's religious education regarding their well-being, cognizance of social norms, and sense of self (Clayton & Stevens, 2018). The home is the ideal context to learn about those ideas and reach for those goals. Kabat-Zinn (1997) worked with everyday mindful parenting and recognized the importance of mindful parenting intentions. Kabat-Zinn (1997) said, "The challenge of mindful parenting is to find ways to nourish our children and ourselves … to grow into who we all are and can become for each other, for ourselves, and for the world" (p. 378). Mindful parenting and spiritually guiding children require courage.

Klink (1972), thinking ahead of her time, argued that the parent is the best teacher for faith formation and said, "From the religious point of view, … parents must set aside the layman's feeling of inferiority. They … are … the right people to introduce the child to the world of faith" (p. 213). Finding support in the church community will foster courage and dispel feelings of inferiority.

Community support. What is the vision that religious educators need to hold while creating a new model for religious education (RE)? Several authors suggested that regardless of the organization, moving from a competitive, individual gains goal to leading with cognizance of what will be best for the whole community is essential and the vision of our future (Bordas, 2012, Nieuwhof, 2012; Sweeney, 2018). Religious professionals need to harness the power of community to increase engagement in faith formation. Innovative problem solving is imperative for religious educators in their current struggles with supporting families in faith formation. Berry (2018) said, RE programs are not "championed by one person, but instead, innovative and integrative collaborative strategies that will reduce burnout and foster a sustainable environment."

Bordas advocated for and encouraged leaders to strategically emphasize inclusive and multicultural leadership and recognize the global community (Bordas, 2012, p. 9). She proposed a new social covenant that emphasized necessary changes in our values to foster an environment where intentional inclusive and multicultural leadership thrives (Bordas, 2012, p. 18). Through the new social covenant, Bordas (2012) viewed communities moving from "I to We—From individualism to collective identity" (p. 18). In a "we" culture, the benefit of the whole is always put before the individual (Bordas, 2012, p. 47).

UUs adopted the spirit of Bordas's idea at their General Assembly in 2019. The conference's theme was "The Power of We" (Williams et al., 2019). UUs explored "a new way of being with each other through the theme of our interconnection" (para. 2). Williams et al. (2019) summarized the essence of the power of we,

> For me, what it's about—to fully embody we—is that I was raised up in a church that has loved me the whole time. Now! Still! Love me then and love me now: that's embodiment of we … We want all of you and your annoying, unnecessary self, at times, and to have

the minister ask me what *I needed* to stay in *my* church, what I needed [was] to feel that my church was still mine. (para. 27)

Living and leading with "I to we" consciousness encourages leaders to approach problems adaptively and enlist all community stakeholders in collaborative leadership towards finding solutions. The "we" consciousness holds a vision for what the organization is working toward as a whole. As religious educators search for a more sustainable solution to UU RE engagement, taking on the new social covenant's "I to we" principle will provide tools to reach parents' needs, desires, and expectations.

Steiner's 12 senses. Rudolf Steiner was an educational theorist in the late 1800s whose work formed the foundations of Waldorf education. If UU RE adopted Steiner's views on pedagogy, an interconnected, developmentally appropriate framework would emerge. Steiner (1920/1986) recognized the opportunities available for experiential learning by engaging in the natural rhythms of the earth community, while remaining mindful of the moment. Steiner's philosophy of man, anthroposophy, "takes into account both the visible and invisible/spiritual aspects of the human being without neglecting findings of natural science" (Lackner, 2016, p. 14). Steiner's views on education emphasized the importance of depending on the natural community and building on natural experiences in a developmentally appropriate way through our senses. Steiner (1920/1986) developed the idea that humans have 12 senses, not just five (Tunkey, 2011).

Central to Steiner's (1920/1986) theory of the 12 senses was his recognition of a threefold framework (physical/willing, feeling, and spiritual/thinking) as the essential structural development of the whole human being. The first four senses, the lowest, are called physical/willing senses, or senses of the will, because they are used to perceive one's own body. The physical/willing category includes the senses of life, movement, balance, and touch. The

middle four senses are the senses of feeling. Observations made with these senses move awareness from an internal experience outward to an external experience. The feeling category includes the senses of smell, taste, sight, and temperature. The last four senses, the senses of spiritual/thinking, are the spiritual or knowledge senses. The spiritual/thinking category includes the senses of *hearing, speech/word sense, thought and ego.*

Steiner also recognized that some senses are felt inwardly while others move the human being toward an outward experience. The realization of both the inner- and outer-sense experiences provides opportunities for enrichment of both the self and how the self relates to the other. The inward directed senses (smell, touch, balance, movement, and life) inform us about our "relationship to the cosmos," while the outward directed senses (taste, sight, temperature, hearing, speech, thought, and ego) assist with "penetrating the outer world" (Steiner, 1920/1986, p. 42). Steiner (1920/1986) claimed, "It is not until 12 senses are taken into consideration that we have completely explored the sensory organization of [the human being]" (p. 37). Van Gelder (2015) emphasized Steiner's ideas and posited, "sensory perception … forms the basis of your relationship with yourself, your surroundings, and the people around you. If you want to learn to observe well, you must use your senses comprehensively and frequently." Steiner's schema is an ancient wisdom that models a spirit imbued view of science. Though other cultures exemplified a similar, common philosophy of thinking, Steiner was inspired by Goethean thinking. His 12 senses theory offered an educational perspective which provided a way to nourish developing human beings with a more nuanced experience in the world. If the human being proceeded through the development and any senses went underdeveloped, they could be noticed as missing even if people could not explain it. Their absence could create a sense of unfulfillment, negatively impacting spiritual development. Steiner offered a broader understanding of the way

in which educators could support the unfolding capacities of the developing human being and potentially make up for any capacities that were not appropriately developed in childhood. Figure 2.1 shows Steiner's (1920/1986) 12 senses organized as a threefold framework to determine the complete development of the whole human being.

Figure 2.1

Steiner's 12 Senses
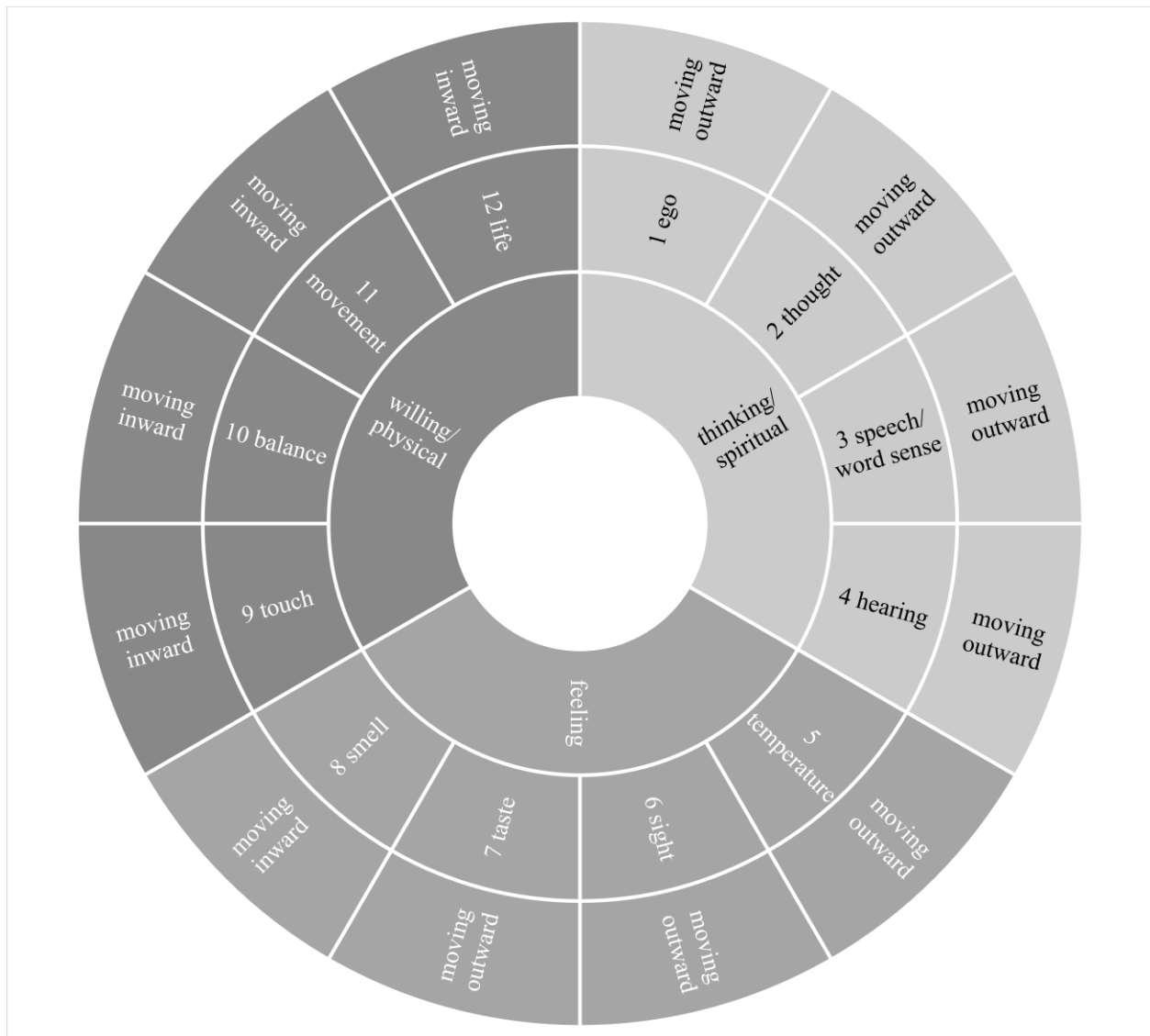
Note. Adapted from *Spiritual Science as a Foundation for Social Forms* [Geisteswissenschaft als Erkenntnis der Grundimpulse sozialer Gestaltung] (M. St. Goar, Trans.), (p. 41), by R. Steiner in

A. Howard (Ed.), 1986, (Original work published in 1920), Anthroposophic Press, Inc.

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If religious education leaders incorporated Steiner's (1920/1986) theory of the 12 senses in UU RE curriculum models, an interconnected, developmentally appropriate framework would emerge. The spiritual, feeling, and physical aspects of the 12 senses relate to the seven UU principles, which are central to the UU RE curriculum. I developed an assessment tool for UU religious educators which encourages them to be thoughtful about how they are developmentally appropriately nurturing the developing sense capacities while including the UU seven principles in each faith formation opportunity. I identified 13 key concepts that appear throughout the seven principles. These 13 key concepts are: dignity, worth, justice, compassion, acceptance, encouragement, freedom, conscience, democratic process, peace, respect, connectedness, and beloved community. The new model of UU RE curriculum that incorporates Steiner's (1920/1986) 12 senses may encourage movement toward engaging, meaningful, developmentally appropriate, and sustainable religious education programming for UUs. The new model could exhibit strength in the foundation of both spiritual and academic development. No past studies, that I am aware of, have considered the link between UU RE curriculum development and Steiner's pedagogical indications. Appendix E exhibits an assessment that shows the juxtaposition between UU principles and Steiner's 12 senses.

Like Steiner, Healy (1990) invested in supporting children in lifelong learning despite the cultural and societal influences that change the way they think. Healy acknowledged that practices from a few decades ago do not always apply to today's family's needs. The fast-paced society influences the younger generations while the parents have increased responsibilities and

are exhausted. "Currently, technological and social change has seized the accelerator, propelling us into an uncertain world—of video, computers, the 'global village.' In this vigorously bubbling 'information age,' many adults feel they have little control and perhaps even less knowledge than their children" (Healy, 1990, p. 45). In line with Steiner, Healy also encouraged adults to be mindful of age-appropriate experiences. "Wise adults do not impose demands for which development and experience have not yet primed the system" (Healy, 1990, p. 242). Healy said that we need to maintain flexibility regarding pedagogy. Rigidity with print and schedules is not responsive to our children's learning in this new technological world.

Lifelong learning is valued in UU faith formation as well. Multigenerational opportunities embedded in the curriculum foster a sense of community and support. A new RE model must consider the importance of Steiner's (1920/1986) 12 senses and the best time during development to nourish them.

Theme 3: Pedagogical Indications for Engaging Families in Faith Formation

Despite differences in religious beliefs, there are areas of agreement among many religious education professionals regarding their current struggles with supporting families in faith formation. As mentioned previously in the historical background discussion in this chapter, those struggles include gaps between what is desired by parents and what is offered in programming, the decline in participation, and lack of community support. Many concerned religious professionals and parents seek meaningful, attainable, and sustainable methods of engagement for modern religious education programming. Although much is not published, there is a growing body of research and development on alternative options for engagement in religious education programming.

This section highlights contributions and innovative methods recommended by UU and other religious professionals. These innovations include Full Week Faith by bellavance-grace (2013), the Binghamton Project by Kadlecek (2018), and methods recommended by religious professionals in other faiths like Think Orange by Joiner (2009) and Lifelong Faith by Roberto (2015). These alternative approaches and opportunities were found to be sustainable and assisted in creating robust RE programs in their respective churches.

Current Innovative UU Faith Formation Models.

Full Week Faith. bellavance-grace served as one of three Fahs Fellows for Innovation in Multigenerational Faith Formation in 2012–2013. The Fellows were tasked with drawing their unique interests and knowledge and asked to "think broadly outside convention and tradition to suggest innovations that address some of the pressing issues our congregations are facing" (bellavance-grace, 2013, p. 5). bellavance-grace sought to understand "how do we get our church to meet people in the places out in the world where their lives are happening?" (2013, p. 5). Questions that framed the project included:

1. What if our ministries of faith formation did not center on Sunday mornings?
2. What if RE classes were more widely viewed as only *a piece* of our faith formation programs and ministry?
3. What if religious professionals believed that the product of their collaboration enabled the spiritual deepening and faith formation work of the whole congregation?
4. What if our congregations intentionally commissioned religious educators and ministers to spend as much time supporting and equipping our people to live faith-filled lives on all the other days of the week, as they currently spend shaping a single Sunday morning experience? (bellavance-grace, 2013, p. 6)

bellavance-grace (2013) emphasized her argument with the concept of experilearn, "a faithful experiment in our religious lives together" (p. 7). She concurred with Rev. Phil Lund when he expressed, "congregational leaders should be willing to acknowledge that some of our experiments in 21st century faith formation will fail, but we should experiment anyway"

(bellavance-grace, 2013, p. 7). These questions steered bellavance-grace toward what she termed the Full Week Faith model, a "mash-up of old-fashioned family ministry, first century-style mission driven church, and a faithful leveraging of technology and social media to expand the reach and breadth of our ministries" (p. 25).

The first element of the Full Week Faith model defined family ministry as the spiritual development of all ages of congregants primarily supported by the church. The support of the church in this model is meant to be consistent and ongoing throughout families' lives and is not intended to be focused solely on Sunday mornings. Moving away from the "Sunday School-centric model of religious education creates space for our churches and religious professionals to intentionally and explicitly equip parents to be their children's first and most consistent religious educators all week long" (bellavance-grace, 2013, p. 26). An example of how an innovative faith formation program would incorporate empowering parents as the primary educators throughout the week would be the Parenting on Purpose group. Parenting on Purpose is a group that could meet mid-week over a pizza dinner that the church provides. Young parents and grandparents are paired and talk about parenting's struggles and joys from a UU perspective. Ideas may include how parents could inspire their children simply. One idea could be packing next-day lunches for children cutting the sandwiches into chalice shapes and sending a note with one of the seven principles (bellavance-grace, 2013, p. 36).

The second element of the Full Week Faith model is based on the first-century mission driven Christian church where followers of Jesus intentionally shared stories of Jesus's transformational ministry with others. This sharing was often done in small groups both spontaneously and intentionally. Their mission was clear: they wanted to spread the Good News that Jesus spoke about to as many people as possible. They were inspired by his teachings and

saw a hopeful future when his teachings were incorporated. The UU church already emphasizes the importance of small group "support, accountability, and fidelity to our spiritual growth" (bellavance-grace, 2013, p. 27). An example of how an innovative faith formation program would incorporate a mission-driven church would be a small group of young adults who gather for conversation and appetizers. Professional staff from the church rotate their participation in the group. One evening they may discuss "whether they can in good conscience go to the concert of an artist who has been accused of domestic violence" (bellavance-grace, 2013, p. 36). bellavance-grace (2013) recognized the importance of the UU faith's own "opportunities to create beloved community while we grow as moral and spiritual beings … We, too, have Good News to share" (p. 27).

The third and final element of the Full Week Faith model put forward by bellavance-grace (2013) centers on leveraging the use of technology as a means and method to promote the messages modern religious educators are trying to share. bellavance-grace (2013) wrote, "social media has tremendous potential to deepen connections and to magnify ministries" (p. 27). However, she was also very aware that with access to technology also comes privilege. Proceeding with engagement through technology while remaining cognizant of that privilege and attempting to provide accommodations and alternatives for those who need it is important. bellavance-grace (2013) referred to a speech by Unitarian Minister of Education Angus MacLean. MacLean gave a 1951 speech in which he argued, "the effective method of teaching values is itself the living exercise of such values" (p. 28). Full Week Faith aims to embrace the ways of our modern world and "share and grow our faith by [living] our faith … every day ... every place … whatever our age and circumstance" (bellavance-grace, 2013, p. 28). An example of how an innovative faith formation program would faithfully leverage technology would be

through a blog post. The day after the pizza dinner, the minister could write a summary of the evening with a suggestion on sharing one of the principles at work or school. The blog would be connected to the church website and provide a link to the church's Facebook page (bellavance-grace, 2013, p. 36).

bellavance-grace (2013) emphatically appealed to her audience regarding the call to move away from faith formation centered on Sunday mornings.

> Full Week Faith invites us to ***begin*** making a cultural shift away from congregational thinking that faith formation happens only (or primarily) on Sundays and that religious education happens only (or primarily) in Sunday School. It means taking a portion of our resources—both financial and staff, and volunteer time—away from planning and implementing Sunday activities and redirecting them to building community, connections, and intentional practices on each of the other days of the week. This means helping our congregants understand the imperative call we feel to live our faith in the world as it is evolving. Our theology holds strengths and gifts essential to navigating our complex and quickly changing world, but Unitarian Universalism will not survive if we pin all our hopes on Sunday mornings. (pp. 29–30)

The Binghamton Experiment. Kadlecek is another UU religious educator with innovative engagement ideas. Kadlecek served as the Transitional Director of Lifespan Faith Development for the Unitarian Universalist Congregation of Binghamton (UUCB) in 2016–2018. In the summer of 2016, UUCB faced what many other congregations recognized as well. Volunteer dependent programming was suffering from waning volunteer efforts and burnt-out volunteers. Program registration and attendance were in decline. Kadlecek (2018) noted, "this was an adaptive challenge and was not going to be resolved by any of the common technical fixes" (p. 6). Kadlecek led a two-part transitional period of the culture shift toward family ministry and redesigned both volunteer and paid staff portfolios.

In the spirit of adaptive leadership (Heifetz et al., 2009), Kadlecek remained cognizant that changing an entire system, even if it is broken, at once will certainly cause great upheaval. It would be best for one to manage the proposed change's size, especially when working with

dynamic systems like congregations (Heifetz et al., 2009). Conversations with congregants centered around reasons for a change in the faith development programming, getting input, and planning some experiments (Kadlecek, 2018, p. 7).

One successful experiment occurred on the first Sundays of the month. Educational workshops followed multigenerational worship for all ages. Music, story, and interactive components were part of the service as well as a separate children's order of service. Some workshops were social action–focused, multigenerational, or age-specific. Communication and publication about the first Sunday experiment was delivered in multiple ways including brochure, announcements from the pulpit, during meetings, and personal outreach to families. A survey and listening sessions allowed for congregational feedback.

Experimentation continued and spanned beyond Sundays. The focus was on supporting parent education and at-home faith development. Parent support included a book group, a lending library with parent resources, and a weekly resource email related to the monthly theme. They also sponsored a two-month visioning event where they evaluated the community's needs and expectations and determined the best next steps for their faith formation program. As a result of the visioning work, "movement toward family ministry was identified as the best fit with family needs and congregational goals" (Kadlecek, 2018, p. 13). Kadlecek (2018) proposed a functional family ministry model that included faith development throughout a lifetime, the significant adults in the children's lives as the primary religious educators, and an intentional community inclusive of all ages.

UUCB recognized that using a family ministry model would also mean that they would emphasize,

- "whole-congregation worship

- social action and social justice for all ages

- parent support and education

- at-home resources

- whole-congregation social and educational events

- worship and education at times other than Sunday mornings." (Kadlecek, 2018, p. 14)

Kadlecek and the Faith Development Transition team recognized the need to redefine the role of the Director of Family Ministry (DFM) and the supporting Children and Youth Committee. Kadlecek and the Faith Development Transition team recognized the need for the DFM to prepare for Sunday morning programming but adjusted the expectation of time spent on that task to be no more than half of their total work time. They dedicated the other half of the time to support families in their faith development. This change made a bold statement that "Sunday morning programing is not the first priority" (Kadlecek, 2018, p. 14). Volunteer efforts in faith formation programming were critical in order to keep the program running. Instead of a primary focus on age-specific Sunday morning programming, the new group (the Family Ministry team) focused on the "experience of children, youth, and families throughout the life of the congregation (Kadlecek, 2018, p. 16). Each member held a portfolio related to a specific area of congregational life. Collaboration with others in the specific area and cognizance of welcoming families were paramount in their duties. Examples of specific congregational life areas included: welcome & connection, at-home faith development, youth, and social action (Kadlecek, 2018, p. 17).

Themes are a "powerful tool for connecting congregants, including across generations" (Kadlecek, 2018, p. 19). Further consideration of how the themes can encourage "additional activities, events, parent support and at-home resources" would "bring greater visibility and

connection … throughout the congregation" (Kadlecek, 2018, p. 19). While acknowledging that

the attendance gauged the success of a program that used a traditional Sunday School model, the

work done for the Binghamton Experiment openly questioned whether that continued to be a

useful measure of success. Kadlecek (2018) stressed the importance of that consideration and

offered,

> Classroom attendance is no longer an accurate measure of the quality or extent of the programming, the religious educator's performance or the benefit to the community. As our understanding of faith development expands into the whole congregation and beyond, new approaches are needed to assess who it is we serve, and which programming is genuinely meeting the needs of our families of all kinds. (p. 19)

Current Innovative Christian Faith Formation Models.

Think Orange. In 2009, Reggie Joiner and his colleagues created the Orange group to

connect church programming (represented by the color yellow) with parents' efforts at home

(represented by the color red). Orange provides resources, blogs, podcasts, curriculum,

leadership seminars, and events to help hopeful religious professionals and parents join to lead

children in their faith formation and spiritual development. Orange represents the combined

efforts of the church and the home. Like Kadlecek, Joiner (2009) recognized the importance of

Family Ministry. He defined Family Ministry as "an effort to synchronize church leaders and

parents around a master plan to build faith and character in their sons and daughters" (p. 83). He

pointed out that parents have more potential to both influence and monitor their child's faith

formation than the church. "The average church only has 40 hours in a given year to influence a

life, the average parent has 3000 hours per year to influence a life" (Joiner, 2009, pp. 86–87).

However, although parents "feel a heightened sense of responsibility for the spiritual and moral

development of their children" (Joiner, 2009, p. 86), they are overwhelmed and often feel

unprepared in religious instruction. Joiner (2009) suggested,

To begin looking at parents through a different filter, imagine every time a parent walks through the door, he or she is asking you to do three things:

1. Give me the plan. Most parents are parenting reactively, yet many of them desire to be proactive. They want a plan that will give them a system of support, consistent influence, and a steady flow of relevant information.

2. Show me how it works. Parents need influence as much as children do, and they desire to be engaged in the process in a way that prompts them to take the best next step.

3. Tell me what to do today. If we are going to truly partner with parents, we have to give them specific instructions. (p. 90)

All this "means the church is going to have to *rethink* what it does and how it can possibly synchronize with the family" (Joiner, 2009, p. 92).

Like Kadlecek, Joiner encouraged religious educators to reduce the amount of time they spent preparing for Sunday morning programming and spending more time supporting parents. "Doing more for the family is the best way the church can have consistent influence in the heart of a child" (Joiner, 2009, p. 93). Joiner (2009) stressed the importance of the Orange idea and noted, "design a strategy that combines the family with the faith community to demonstrate the message of God's story, in order to influence the next generation" (p. 109).

Lifelong Faith. Roberto is the project coordinator for Certificate and Innovation Labs programs associated with vibrantfaith.org (Vibrant Faith, 2020). He offered Christian religious educators' suggestions on how to "reimagine faith formation for the 21st century." His ideas were consistent with many other leading religious professionals in their efforts to embrace the current challenges. Roberto (2015) suggested:

faith formation in the twenty-first century will need to create new models, approaches, resources, and tools to address the four significant adaptive challenges … we will need an innovative spirit and a firm belief that we *can* provide lifelong faith formation for all ages and generations across a ten-decade life cycle; that we *can* address the changing patterns of America society (ethnic cultures, generations, families); that we *can* respond to the diverse religious beliefs and practices of people today; and that we *can* create new ways to promote religious transmission from generation to generation. (pp. 34–35)

Recently, in response to the global pandemic, COVID-19, and the effects it has had on religious education, Roberto (2020) published a *Guide to Transforming Faith Formation for a New World* arguing:

> this moment when churches are forced to abandon old models and reimagine church in new ways, creates a unique opportunity for religious communities to reflect on the needs of people in contemporary society. The COVID-19 pandemic offers an essential moment for religious institutions to re-evaluate whether their ministry models truly meet people's desires for community and connection with others. (p. 3)

Roberto (2020) agreed with Campbell's (2020) ideas about translating live worship to a virtual setting now as "churches are forced to abandon old models and reimagine church in new ways." Campbell noticed three approaches taken by religious professionals to adapt to an online platform for the foreseeable future. The three strategies included "transfer, translation, and transformation approaches to services." Roberto (2020) suggested religious educators adapt the three approaches for use in faith formation programming. The transferring approach involves using a camera in the traditional setting to broadcast the worship service (or RE class) as it would have normally been taught. The translating approach involves modifying the environment for selected elements of the worship service (or RE class) so that the virtual participant may have a more personal experience. The camera may be moved closer to the choir or teacher. Several

religious professionals expressed concerns for the social aspect of the service. Campbell (2020) reported, "59% of pastors surveyed felt online church services struggled to create opportunities for social engagement and conversation within the community." The transformation approach addresses these concerns. Campbell (2020) explained, "in this [transformation] approach, religious leaders reflected both on what new forms of gathering digital technology could facilitate, as well as on the needs voiced by their members for online experiences that would help support and build community." A religious educator could, perhaps, use websites that aid in facilitation of online interaction in a game format. Examples of this include jackbox games and freebingocards.com.

Roberto (2020) focused on "designing Faith Formation 2.0 that builds a more resilient, flexible, and adaptable form of faith formation with age groups, families, and the whole community (intergenerational) in response to the new conditions of the post-COVID-19 world" (p. 20).

This section of the literature review outlined the three themes for this research. First, the role which generational identification plays on parenting decisions regarding faith formation engagement. Second, the overlap of Steiner's (1920/1986) lifespan development theory with intentional, appropriate curriculum. Last, several alternative options for faith formation opportunities were discussed that religious educators can consider while navigating through a paradigm shift in RE. Those options could be viable whether the change is necessary because old models are outdated or because our world's current status during the global pandemic does not allow for in-person gatherings. The next section will propose a conceptual framework and two leadership theories to implement new models in RE.

Conceptual and Theoretical Framework Relevant to Research Questions

Another field of scholarship that informs this research is that of leadership. In particular, this section explores the elements of collaborative leadership (Chrislip, 2002; Chrislip & Larson, 1994; Pearce & Conger, 2003) and adaptive leadership (Heifetz et al., 2009; Heifetz & Laurie, 2001) and how these lenses may powerfully inform a rethinking of religious education in Unitarian Universalist contexts.

Collaborative Leadership

Collaborative leadership came into public view in the early 1990s (Chrislip & Larson, 1994). The fundamental premise of collaborative leadership is that any organization is only as strong as each individual's collective strength within the organization. The strength of the contributors becomes evident through creative problem solving for shared concerns of the organizations.

The collaborative leader encourages relationships that are grounded in commitment and prioritizes confidence in collaborators in the group. The resulting trusting relationship is mutually beneficial because as peer problem solvers, contributors encourage each other to achieve group and organizational goals beyond any individual goal (Chrislip & Larson, 1994, pp. 139–141; Pearce & Conger, 2003). Collaborative leaders strike a balance between passionately leading others into collaboration and humbly guiding the collaborative process. Chrislip (2002) described that balance and said, "collaborative leaders are insistent yet not domineering, compelling but not heroic, credible rather than powerful (in the traditional sense), concerned with process as much as content, and much more behind the scenes than on center stage" (p. xiv).

Collaborative leaders recognize that the process of collaborating and producing output can often manifest slowly. Some contributors could construe a lack of immediate resolution as

frustrating or pointless. The collaborative leader acknowledges those perspectives but also sees

the process as advantageous. In situations when it would be easier to quit rather than engage in

hard work, collaborative leaders build confidence, sustain hope and participation, and celebrate

relationship-building value (Chrislip & Larson, 1994; Huxham & Vangen, 2004). Chrislip and

Larson (1994) stressed the importance of connectedness within a community to transform the

ways in which they solve complex problems.

The binding agent that contributes to the success of collaborative leadership is trust. The

collaborative leader establishes a trusting camaraderie within the community, inspiring

commitment, and action (Chrislip & Larson, 1994, pp. 139–141). The bond that is formed is

strong, and solutions to more challenging issues are accessible. Chrislip and Larson (1994)

pointed out,

> If you can bring the appropriate people together (being broadly inclusive) in constructive
> ways (creating a credible, open process) with good information (bringing about a shared
> understanding of problems and concern), they will create authentic visions and strategies
> for addressing the shared concerns of the organization or community. The leadership role
> is to convene, energize, facilitate, and sustain this process. (p. 146)

The United States of America was founded on the virtues of what philosopher John

Dewey (1962) called "rugged individualism" (p. 14). Several significant historical figures in

American history, including Benjamin Franklin, Walt Whitman, Henry David Thoreau, and

Ralph Waldo Emerson sought a lifestyle of self-reliance (Chrislip & Larson, 1994). As addressed

earlier in this chapter, in this fast-paced world with 24/7 connection and social and

environmental problems that transcend local interests and, even, national boundaries, the tension

between individualistic thinking and the collective welfare is particularly prominent and

concerning. This is especially so in the current times of uncertainty related to the global

pandemic of COVID-19. Although Senge (2006) wrote about collective welfare two decades

ago, his premise applies to today's situation. People now, more than ever, are seeking experiences where they can be connected to something greater than themselves (Senge, 2006). A decade earlier, Chrislip and Larson (1994) also referred to the idea of collective welfare. They advocated for responsibility and recognized that we are all in this together.

Collaborative Leadership in Action

Chrislip and Larson (1994) were particularly attracted to civic organizational change and development. They sought to understand the change shared within a community through the lens of the community members (Chrislip, 2002). Chrislip and Larson (1994) established a link between collaborative leadership and the democratic process. They supported the notion that communities have the capacity to create their own visions and solve their own problems with a democratic process. Chrislip and Larson emphasized that this process is most successful with leaders who convene people inclusively energize them to be creatively constructive, facilitate an open process with a shared vision, and sustain the process with effective strategizing for the shared concerns of the community. Chrislip and Larson's link between collaborative leadership and the democratic process was congruent with the work Collier (1997) did in the UU church. The UU church serves as a civic organization to a community of diverse individuals. Collier (1997) recognized the importance of including the democratic process in the UU community. From his UU perspective, Collier argued that it is a misconception to view democracy as a privileged majority controlling the outcome of an organizational decision. Instead, in light of the UU belief that inherent worth and dignity of every person is assumed, no one is privileged. Therefore, all community members equally carry the responsibility for every other member of the community. Collier (1997) deduced, "if all are responsible, then all should participate in governing, and democracy is the best way we know to accomplish this" (p. 73).

The collaborative model is one that Millennials identify with deeply in their professional and spiritual lives. Professional organizations and churches need to adopt collaborative approaches to appeal to the Millennial generation. Balda and Mora (2011) concluded that Millennials thrive in "a collaborative and participative culture within organizations and centered in trust, enabling interdependency, care, organic coordination, and relational and social connectivity" (p. 19). Nieuwhof (2015) noted that Barna and Kinnaman tracked Millennials' attitudes toward spiritual group involvement. The data supported the community-centered, collaborative approach and emphasized that identifying with a community is one of Millennials' primary desires in their faith home.

Green (2018), the Youth and Young Adults of Color Ministry Associate for the UUA and a Millennial herself, concurred with Nieuwhof (2015) and offered excellent insights on working with Millennials as parents in the RE context. Green emphasized the role trust has in collaborative leadership and encouraged us to "move at the speed of trust" and work on building a movement rather than a congregation. She emphasized relationship and intentional action with immediate results. Green was inspired by a. m. brown (2017), who encouraged her readers to pay attention to others, make intentional, authentic connections, act from a place of love, and create space for necessary change. a. m. brown called out the Xennials, a threshold generation explained earlier in this chapter. a. m. brown said, "our generation [Xennials] must walk the spiritual path that is available to us only in this time, with its own unique combination of wisdom and creation" (p. 12).

When a community can feel that camaraderie, the bond formed is strong, and solutions to more challenging issues can be found. Chrislip and Larson (1994) said that "communities transform in ways that achieve tangible results and, more important, change the way the

community addresses complex public concerns. A deeper sense of connectedness and community grows out of the interaction" (p. 146).

Collaborative leadership, the democratic process, new emergent strategies for community change, and Putnam's perspectives on the decline of community involvement provide a landscape for approaching the urgency to shift the paradigm about UU Sunday school. Implementation of a new model will only be successful if insight, support, and trust are gained from the congregational community. Chrislip and Larson (1994) were confident that collaboration would lead to a new culture in which citizens would forge new relationships where the greater good is the goal and not just individual gain (p. 13).

Leaders who resonate best with collaborative leadership are what I like to call the professional dot connectors. These people have a vested interest in success for groups. They have valuable knowledge about a community, what talents exist, and who has them. Then, they easily connect people with groups who may have problems that people can help with. However, the connections do not need to end with that first step. The visionary dot connectors will continue with the group and provide guidance and additional suggestions or connections as the needs arise. The needs will arise as the group delves more in-depth into the work. Also, needs may arise out of changes in environment, expectations, or logistics. If these needs are new and require inherent change (not just a quick fix), they are considered adaptive. Leading collaboratively with these types of needs requires an additional lens, one of an adaptive leader.

Adaptive Leadership

Adaptive leadership developed out of the impulse for organizational improvement and change among researchers from the 1960s to the 1990s (Heifetz et al., 2009). They were particularly interested in human development and the predictable ways people chose to solve

problems (Heifetz et al., 2009, p. 13). Heifetz and his colleagues recognized two distinct types of

solutions to problems within organizations. The first type of problem involved technical

challenges that could be solved with the skills and knowledge that already existed within the

organization. The second type of problem involved adaptive challenges that required behavioral

change and new capacities (not only new skills) to find a solution (Heifetz et al., 2009;

McGuigan & Popp, 2018).

The adaptive leader's work is to identify adaptive challenges and then discover suitable

interventions that lead to solutions. Heifetz et al. (2009) recognized that "adaptive challenges can

only be addressed through changes in people's priorities, beliefs, habits, and loyalties. Making

progress requires going beyond any authoritative expertise to mobilize discovery, shedding

certain entrenched ways, tolerating losses, and generating the new capacity to thrive anew" (p.

19). That work is done through an iterative process that progressively builds and requires

ongoing refinement (Heifetz et al., 2009; Heifetz & Laurie, 2001).

The first step is observation. The adaptive leader approaches an organizational challenge

by observing events and patterns from a broader perspective. They step back from the situation

and attempt to gain a broader perspective of the problem. A helpful analogy for this step is

getting off the dance floor and watching from the balcony (Heifetz et al., 2009; Heifetz & Laurie,

2001). Objective evaluation of the situation is vital. To be successfully objective, removing all

bias and personal interest is imperative. With distance, patterns may emerge that would have

been too difficult to recognize in the midst of the issue (Heifetz et al., 2009).

The second step is interpreting what was observed and pausing for reflection. Thoughtful

consideration of the observations before acting on them is an excellent practice for discovering

meaningful, appropriate solutions. The consideration allows the adaptive leader to observe

(developing multiple hypotheses about what is going on) before jumping into action (Heifetz et al., 2009).

The third step is designing interventions based on the observations and interpretations. The adaptive leader acknowledges the experimental nature of the intervention stage and identifies many approaches to try to find the best solution to the problem. The connection between problems and proposed solutions must include reasonable and applicable components (Heifetz et al., 2009).

New ideas may emerge from the interventions and lead to the need to repeat the process. While discerning a reiteration, the adaptive leader incorporates collaborative leadership and empowerment of all those involved with the process. The adaptive leader will expose any disconcerting feelings or superficial conflict and emphasize the benefits of collaboration. They attend to all who comment on the process, value differing opinions, and challenge norms (Heifetz et al., 2009; Heifetz & Laurie, 2001).

Adaptive leadership can be challenging and requires the leader to have great ingenuity and courage to face adversity or problems with new eyes. Being willing to take chances and possibly fail is normal. Allowing oneself (and thus one's group) to be vulnerable and open with the learning is essential. Adaptive leaders courageously model an experimental, tenacious, and open mindset. Heifetz et al. (2009) described that mindset and said, "you must believe that your intervention is absolutely the right thing to do at the moment you commit to it. But at the same time, you need to remain open to the possibility that you are dead wrong" (p. 37).

Heifetz et al. (2009) pointed out, adaptive leaders are reporters of the facts, they tell people what is happening, what is potentially problematic, and empower them to solve problems. Hearing those facts is not always easy for people and often reveals a sense of loss, and thus a

resistance to the change. People often resist changes that represent the loss of something that seems valuable to them. Heifetz et al. (2009) suggest "a key to leadership, then, is the diagnostic capacity to find out the kinds of losses at stake in a changing situation … [and actively engage in] assessing, managing, distributing, and providing contexts for losses" (p. 23). The adaptive leader's work centers on guiding people in modifying or changing the stories that justify their actions to themselves. Then, facing those difficult questions and discarding that which no longer serves them often proves to be painful but necessary.

Adaptive Leadership in Action

The field of psychology has long explained why individuals and groups of people in organizations resist change and new ideas. Like all-natural systems, human beings strive toward equilibrium—physically, socially, and ideologically. Festinger (1957) posited that human beings strive for internal psychological consistency and experience cognitive stress or dissonance when their understandings of the world—their world—are challenged by new information or situations. Heifetz et al. (2009) recognized the importance of the spirit of adventure and willingness to change within a specific zone between the threshold for change and the limit of tolerance (p. 29). They called his the "productive zone of disequilibrium (PZD)" (Heifetz et al., 2009, p. 29). Heifetz et al. (2009) offered, "your goal should be to keep the temperature [with] enough heat generated by your intervention to gain attention, engagement, and forward motion, but not so much that the organization (or your part of it) explodes" (p. 29). Figure 2.2 is a visual for the productive zone of disequilibrium.

Figure 2.2

The Productive Zone of Disequilibrium
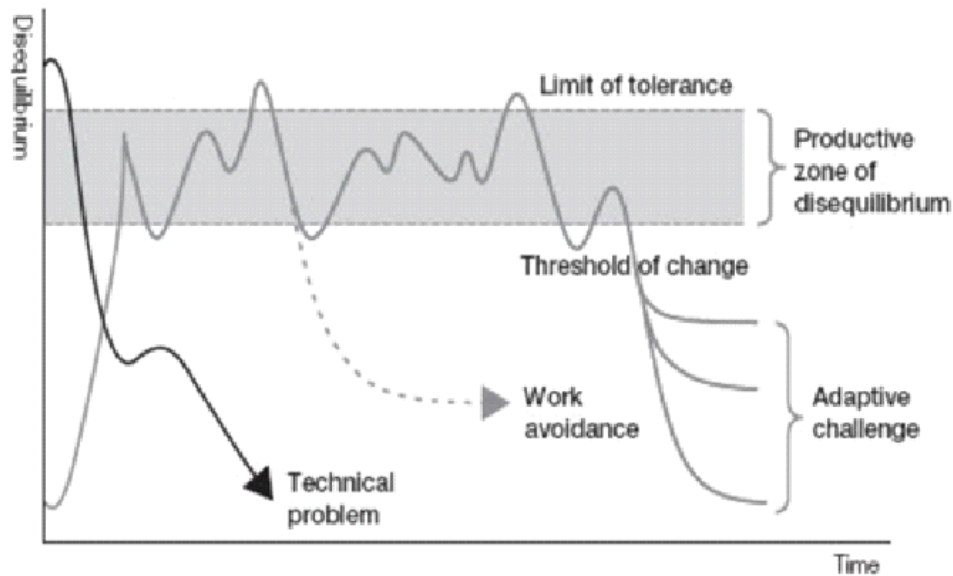
Note. Reprinted by permission of Harvard Business Review Press. From "The Practice of

Adaptive Leadership" by Ronald A. Heifetz, Marty Linsky, and Alexander Grashow. Boston,

MA, 2009, p. 30. Copyright ©2009 by the Harvard Business Publishing; all rights reserved.

The productive zone of disequilibrium is shown in dark gray. This is when people feel stress

enough to address and produce results on problems in which they would prefer to ignore.

When a congregation is faced with a problem that cannot be solved with a technical

solution, when some congregants may be holding on to the outdated procedures, when

innovative thinking is necessary for the church to thrive, then an adaptive capacity of thinking is

needed. If that truth is not embraced, the congregation becomes "conceptually stuck" (Friedman,

2007, pp. 32–33). Friedman (2007) continued, "systems cannot become unstuck simply by trying

harder. For a fundamental reorientation to occur, that spirit of adventure which optimizes

serendipity, and which enables new perceptions beyond the control of our thinking processes must happen first" (p. 32).

Bolsinger (2015) warned, "In every field, in every business, every organization, leaders are rapidly coming to the awareness that the world in front of us is radically different from everything behind us" (p. 27). When this quote was written, Bolsinger unknowingly indicated truths about the changes in our world during the year 2020. In these unprecedented times of uncertainty due to the global pandemic, COVID-19, operating with an adaptive leadership approach and using the tools described by Heifetz and his colleagues are viable options for leaders who want to embrace the circumstances and modify their operations to meet the demands of the current status of our world.

Collaborative and Adaptive Leadership Similarities

There are several similarities between collaborative and adaptive leaders. First, the leader is a dot connector. She knows the skills and talents within a community and easily connects them with others who require their expertise. The dot connectors, who can foresee valuable connections for the organization, will continue with the group and provide guidance and additional suggestions. Second, the leader is willing to fail and sees failure as an opportunity for growth which implies a growth mindset. Nonattachment to any method to solve a problem is essential. They have an attitude of "let us try this and see what happens." Third, the leader removes self-interest or concern for personal gain from her input. These leaders are not particularly money motivated or concerned about climbing any corporate ladder to rise to the top, and thus a powerful position, in an organization. This often requires first looking at oneself and what resistance may be deeply hidden in one's personality, potentially sabotaging development, perspectives, and success. Fourth, the leader has the best interest of followers and

their work in mind. The goal is to find a solution to problems that will serve the greater good of all involved.

There are also several similarities with the practices of collaborative and adaptive leadership. First, both practices produce new and innovative change that responds to identified needs. Second, the practices empower followers. The group of people resonates well with each other, and they have a willingness and desire to work together. Third, the practice connects members in the community with the expertise to find solutions and taps into the energy of the whole system. This often involves understanding group dynamics and how to bring out the best in others intuitively. Fourth, the practice is unpredictable. No strict protocol or list of expectations is followed. Each action is based on the result of the previous result.

Integrative Summary

Implications of Themes and Paradigm Shifts

In this literature review, I used the themes which surfaced from a preliminary exploratory study and explored several theories, perspectives, and indications which led me to greater clarity on how the themes informed the need for a paradigm shift within religious education in the UU church. The preliminary exploratory study considered participants' attitudes regarding satisfaction with their current religious education offerings in their congregations. Following are the themes that surfaced from the preliminary exploratory study and how I examined the role of the themes in a paradigm shift in UU RE pedagogy:

1. Millennial and Generation X parenting led me to explore role which generational identification plays in parenting decisions regarding faith formation engagement.

2. Lifespan religious education opportunities led me to explore the overlap of Steiner's (1920/1986) lifespan development theory with intentional, appropriate UU RE curriculum.

3. Pedagogical indications for engaging in faith formation opportunities led me to explore viable, alternative options for faith formation opportunities can serve as a springboard to future possibilities for engagement while navigating through a paradigm shift in RE.

In her discussion of paradigm shifts, Sweeney (2017) confirmed the need for changes in UU RE pedagogy. Sweeney suggested shifts that congregational leaders and religious professionals could implement to better suit the modern family in their efforts for sustainable faith formation. Sweeney emphasized that the rethinking and restructuring of Fahs's old Sunday school model (the old paradigm) is necessary. Sweeney's ideas led me to explore and extend the paradigm shift suggestions with representative goal words for faith formation opportunities in each paradigm shift. Current literature on alternative options for engagement in religious education programming exemplified my goal words and showed ways in which religious educators could be more *impactful* and *meaningful* (shift #1), *interconnected* and *attainable* (shift #2)*,* and *innovative* and *sustainable* (shift #3)*.*

Implications of Leadership Theories

Both adaptive and collaborative leadership frameworks offer insights and strategies for rethinking and reformulating religious education programming. UU congregations face finding solutions for the adaptive challenges during these times of uncertainty related to COVID-19 and the need for a paradigm shift in RE models. The leadership that is needed is what Bolsinger (2015) referred to as "unchartered" (p. 42). He encouraged leaders to challenge and transform past approaches to problem solving and give less attention to planning structured programs.

The future leaders in UU RE will need to exemplify an attitude of adaptability. Gaining inspiration from others' adaptive change in RE engagement is advantageous; however, cognizance of individuality among congregations is important. Each congregation has unique circumstances and goals that need consideration. The enormous task of rethinking religious education is not only the work of the minister and religious educators. It is the task of the entire congregation. Collaborating in the spirit of shared ministry to find answers and solutions to our questions and issues is the work of the entire congregational community.

A central element of action research is collaboration. This work requires a shared vision with an action research team, development of strategies to attend to needs, wants, and expectations of Gen X and Millennial parents, and fostering an environment of trust which will build strong communities. In turn, with trust as a keystone in the community, congregations will be empowered to build meaningful, attainable, and sustainable faith formation programs.

A few religious education professionals have already begun the conversation of adaptive change with collaborative leadership during these times of transition. bellavance-grace (2013), with the Fahs Collaborative, addressed the need for faith innovation and encouraged religious education professionals to "breathe fresh air into how we teach, learn, and grow" (p. 5). This work will require leadership with adaptive capacity. Bolsinger (2015) concurred with a fresh, adaptive approach and offered, "Leadership becomes transformational through the integration of adaptive capacity … [that is] the capacity to lead a process of shifting values, habits and behaviors in order to grow and discover solutions to the greatest challenges brought on by a changing world" (p. 44).

The UU principles are the foundation on which UUs base their actions to respond to the "highest common calling" (Jones, 2019). A part of the action is an intentional community effort

and investment in faith formation. A community effort will require leadership that provides the

leaders in UU RE a guideline for how to redefine engagement best and shift the paradigm to

produce a more meaningful, attainable, and sustainable program for the modern parent. The

theoretical frameworks of adaptive and collaborative leadership are two vital leadership theories

that inform this research.

The work done in this research

- revealed the changed environment of RE in the UU church and aimed to shift to a process

  that remains unclear but is hopeful for an attempt at impactful and meaningful change in

  UU RE,

- encouraged an attitude of transformation toward community involvement for both leaders

  and followers in the context of UU RE,

- lead to innovative solutions that engaged followers in conversations about future

  possibilities for more sustainable RE programming and the losses incurred.

Paula Cole Jones is an independent consultant specializing in multicultural competencies

and institutional change. She often preaches on how the UU faith's focus is particularly adaptable

to the faith innovators of the future and lifts the community's strength through collaborative

energy. In a sermon, Jones (2019) referenced Diana Eck, director of the Pluralism Project at

Harvard University, when Eck spoke to a group of Unitarian Universalists:

> If there ever were a time that we need to spin out a new fabric of belonging and a wider
> sense of we, for the human community, it is certainly now. Developing a consciousness
> of our growing religious interrelatedness, developing a moral compass that will give us
> guidance in the years ahead, these are certainly among the most important tasks of our
> time. You have [she said speaking to Unitarian Universalists] a theological orientation
> toward the oneness and mystery of God that is essential for the world of religious
> difference in which we live. You are in my estimation the church of the new millennium.
> In this era, Unitarian Universalism is not the lowest common denominator, but the
> highest common calling. You do have a mission. The world is in need of your theology.

In this chapter, I reviewed significant historical background to RE in the UU church, identified several relevant literature sources that inform the research being proposed, and explained two leadership theories, adaptive and collaborative, that offer insights and strategies for rethinking and reformulating religious education programming.

Based on the evidence presented, I am charged with the task of addressing the gaps in religious education in the UU church, particularly during this time of COVID-19. I will redefine engagement and create a sustainable change model that is needed and wanted by families. To date, as far as I am aware, no one has formally gathered qualitative data regarding paradigm shifts in RE in the UU church. I look forward to providing this important exploratory research to the field of UU religious education.

Chapter III: Methodology/Guiding Questions and Research Procedures

Introduction

In the previous chapter, I highlighted literature that supports the three themes for this dissertation: Millennial and Gen X parenting, lifespan and faith development theories, and pedagogical indications for engaging families in faith formation opportunities.

This dissertation aimed to discover how religious professionals were engaging families in faith formation opportunities in the context of four congregations in Southern Arizona, then responsively redefine engagement in faith formation programming in those congregations. Religious education professionals have felt the need for redefining engagement in UU RE for at least a decade and have worked on this in the field, but there is a dearth of research on it. Bogdan and Biklen (1998) pointed out, "It is difficult to act forcefully toward some goal when you rely on feelings without data to support your views. Data gathering helps you to plan strategy and develop community action programs" (p. 230). This research provided the needed qualitative data to work toward updating and developing faith formation programs in the UU church.

This chapter explains the framework, methodology, and design of the research. It begins by stating the research question and sub-questions. Next is a brief explanation of the methodology and research approach, action research, the context of the study, and how that was applied to a specific case study. Then, further discussion of action research and an overview of a preliminary exploratory study and lessons are presented. Last, specifics about recruitment and selection of the participants and the study design details are delineated.

Research Question

My research question is: How could UU RE professionals more effectively engage families in faith formation opportunities designed to meet the desired outcome of UU parents/caregivers?

Sub-Questions

1. What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents' needs, desires, and expectations of these offerings?

2. What multigenerational and UU parenting faith formation opportunities are offered in religious education programs?

3. What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their needs, desires, and expectations that will help make RE programs more sustainable?

Methodology and Research Approach

Action Research Framework for Case Study

The action research approach is similar to a possible framework for life. When we acknowledge that we are always changing and frequently reflect on and consider opportunities for improvement, we engage in an iterative cycle of self-improvement. McNiff (2017) said, "Action research, as part of a life of enquiry, generates the kind of knowledge that contributes to sustainable personal, social, and planetary wellbeing" (p. 17). Research that identifies the specific needs, desires, expectations, and cultural influences involved in efforts to alter RE programming can produce meaningful, attainable, and sustainable solutions to the current struggles to support faith formation for UU families. Bradbury-Huang (2010) noted, the purpose of action research is "to effect [sic] desired change as a path to generating knowledge and

empowering stakeholders" (p. 93). Utilizing the methodology of action research enabled me as a practitioner to include all stakeholders—religious professionals, parents, members of the congregation, and congregational leaders—who were inspired and empowered by the possibilities of changing the religious education paradigm.

McNiff (2017) outlined the three major methodological assumptions associated with action research. First, "all practitioners are agents, not recipients or onlookers" (McNiff, 2017, p. 45). The practitioners in my research included the parents involved in UU RE programming and the religious education professionals on the innovator team. My research questions were best answered with input from parents directly involved with and committed to family ministry in their UU congregation as well as from the innovator team of religious education professionals. A second major methodological assumption of action research is that "the methodology is open-ended and developmental" (McNiff, 2017, p. 45). In this research design, the innovator team drew on interview data of parents' perspectives and expectations to develop a new engagement pilot program. Further, the innovator team attended responsively to data generated in the iterative process of implementation and reflection. A third major methodological assumption of action research states that "the aim of the research is to improve learning with social intent" (McNiff, 2017, p. 45). That is, this research study aligned with the mission and vision of the Liberal Religious Educators Association (LREDA), "[to create] a world guided by love, justice, and equity by advocating for and supporting professional religious educators, advancing the field of UU faith development, engaging in the transformative power of shared ministry, and challenging systems of oppression" (LREDA, 2020). Beginning from the three major methodological assumptions of action research outlined by McNiff (2017), this research honored parents as agents in the case study context and captured their needs, desires, and expectations which

directly informed the innovator team's work. I created a malleable pilot study that was changed

and adapted throughout the launch period in response to suggestions from the innovator team and

the participants. Additionally, activities were included that were nonspecific to the case study

context.

Beginning from the three major methodological assumptions of action research outlined

by McNiff (2017), this research study aimed to improve learning opportunities for families

involved in faith formation in one specific congregational cluster while emphasizing the value

and importance of social intent for families in other congregations in the UU Association.

Context of Research Site

I approached the Director for Lifespan Faith Development, Jamili Omar, at the Unitarian

Universalist Church of Tucson (UUCT) and asked if they were interested in participating in this

research project. UUCT participated in the preliminary exploratory study, and both the religious

professionals and families involved in faith formation programming qualified as early adopters to

changes in UU RE (for further explanation of early adopters, see the explanation of Rogers's

work on the diffusion of innovators theory later in this chapter). Ms. Omar and the minister, Rev.

Bethany Russell-Lowe, received the invitation positively. However, they also informed me that

due to the current global pandemic, COVID-19, they had moved all events to a virtual platform

and combined ministerial and education efforts with the other three UU congregations in

Southern Arizona, known as the Baja 4. UUCT was the leading congregation in the

conglomerate of four congregations in Southern Arizona. The Baja 4 includes Mountain Vista

Unitarian Universalist Congregation (MVUU) organized in 1989 and is based in North Tucson,

Borderlands Unitarian Universalist Congregation (BUU) organized in 1993 and is based in

Amado, Sky Island Unitarian Universalist Church (SIUUC) organized in 1997 and is based in

Sierra Vista, and UUCT organized in 1948 and is based in Tucson. The four congregations'

combined total membership is 593 people, and church school enrollment is 119 children (UUA,

2020a). Currently, only three of the congregations (BUU, MVUU, and UUCT) have families

with children. BUU has only one family. The family participates in many multigenerational

activities related to faith formation with the congregation, but BUU does not have a specific

religious education program for children. The family often joins activities provided by Ms. Omar

with UUCT (personal communication, January 19, 2021). MVUU and UUCT have active

religious education programs for all ages. MVUU recently lost their Director of Religious

Education but they continue to employ a part-time (5 hours/week) Religious Education Assistant

(personal communication, February 5, 2021). The current Religious Education Assistant at

MVUU is hosting a popular preschool program (Parents of Preschoolers, POPS) that is well

liked by several families in the Baja 4. MVUU honors the children in the congregation and

encourages families to participate in multigenerational faith formation offerings; however,

MVUU is not currently offering any faith formation activities for school-age children. UUCT

values faith formation for all ages and identifies their RE program as Lifespan Faith

Development. UUCT's mission statement declares, "our lifespan learning community seeks to

nurture and stimulate the spiritual, intellectual, emotional, and social growth of people of all

ages, stages of faith and levels of religious experience" (Unitarian Universalist Church of

Tucson, 2020). Their faith formation offerings are extensive, offering multiple and varied

learning opportunities for all ages. All congregations in the Baja 4 were invited to participate in

this study. Participants, the innovator team, religious professionals from Baja 4, and I interacted

in a virtual context using Zoom as the platform for meetings, interviews, and focus groups.

My approach to the case study reflected three criteria as noted by Yin (cited in Baxter & Jack, 2008) and featured qualitative data from the Baja 4. First, a case study focuses on "how and why questions" (Baxter & Jack, 2008, p. 545). This study sought to discover *why* the traditional approach to RE programing was no longer relevant and *how* religious educators could adapt to the need for change in the RE paradigm by more successfully engaging families in faith formation opportunities. Second, the participants' behaviors were not manipulated as part of the study (Baxter & Jack, 2008). This study involved tapping into the opinions and perspectives of the participants. They answered interview questions, participated in a pilot study, and contributed to a focus group at their own free will. Third, the "contextual conditions" of the study were important because they either directly related to the "phenomenon under the study" or "the boundaries are not clear between the phenomenon and context" (Baxter & Jack, 2008, p. 545). Working directly with the Baja 4 enlightened my understanding of how social context may contribute to a paradigm shift in UU RE. Incorporating a case study approach with the methodological framework of action research was suitable for this study. Next, I discuss Kurt Lewin's ideas about action research.

Introduction to and Discussion of Action Research

After a lifetime of study and research as a social psychologist, Kurt Lewin was keenly aware of issues related to group dynamics, particularly among minority groups. He noted an increasing need and desire for actively working out problems along with a lack of guidance on how to proceed with needed changes. He also noticed a need for achievement standards which would improve generalization from one case to the next and, particularly, a need for more social research within specific contexts in the field (Lewin, 1997). Lewin's insights were concerned with and responsive to his critique of traditional social science research. He argued for the

importance of understanding individual situations and conditions—contexts—and encouraged collection of more intimate and nuanced data sources such as interviews.

To address his concerns, Lewin (1997) proposed a model in which social scientists gave priority to considering the reason and context for the research. Lewin called his model action research and proposed a procedure which was divided into three distinct periods. During the first period, the researcher carefully examines the means that are available to consider the research idea. Next, the researcher engages in fact finding in order to determine an overarching plan so that the first step of action becomes clear. Then, after actively engaging with the research, the researcher enters a reflexive period of reconnaissance and evaluates the action that was taken. During reflection, the researcher would determine which facts were previously unknown and use the new insights to modify the overarching plan. Those three steps were then repeated as the researcher further distilled the "intel, motive, and method for change" (Lewin, 1997, p. 146). Lewin (1997) said, "Rational social management, therefore, proceeds in a spiral of steps each of which is composed of a circle of planning, action, and fact-finding about the result of the action" (p. 146). Figure 3.1 shows the basic iterative cycle of action research.

Figure 3.1

Lewin's Spiral of Steps for Action Research
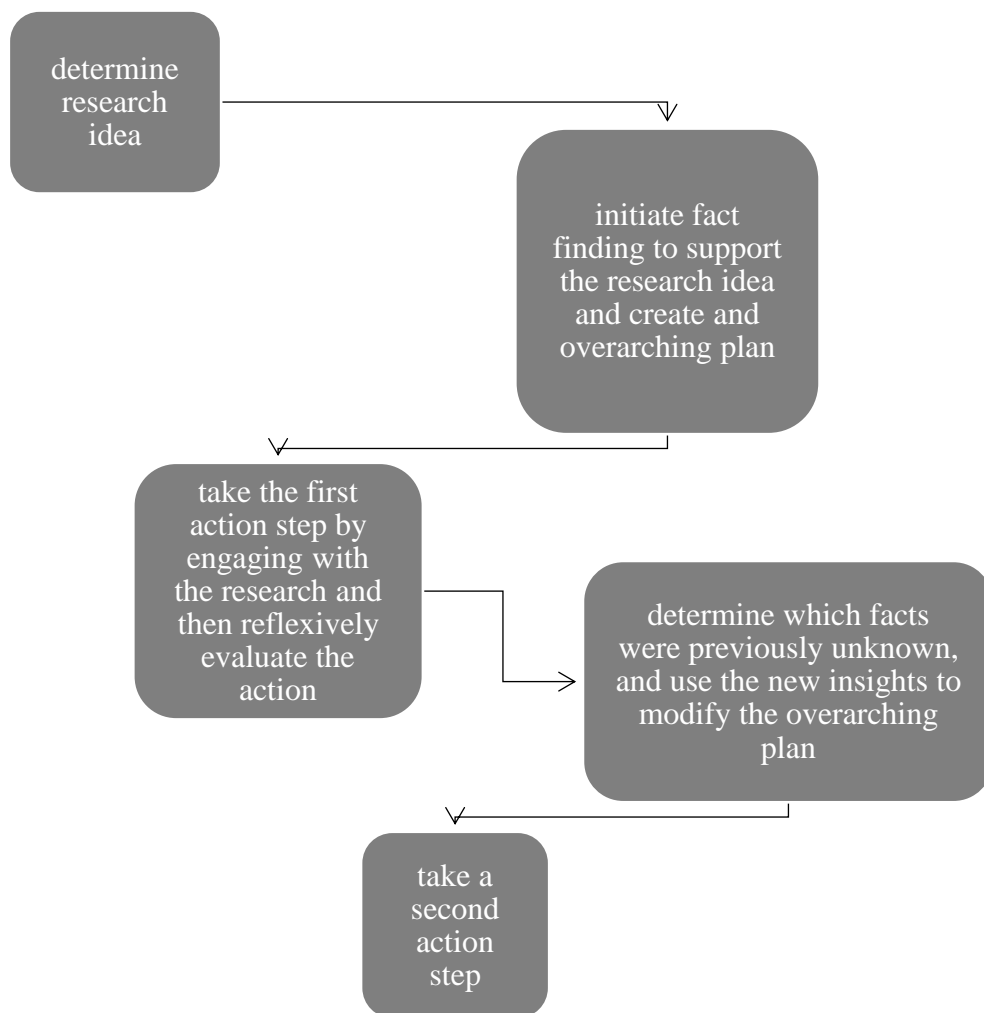
Note. Adapted from "What is action research and how do we do it?" by M. K. Smith, 1996, 2001, 2007, 2017, 2020, (https://infed.org/mobi/action-research/).Copyright 2017 by Mark Smith.

Reason and Bradbury (2006) described action research as a family of research approaches that are generally recognized by many traditions. Regardless of the format, the approach is always action oriented, based on experiences, and includes participation from key stakeholders and informants (Reason & Bradbury, 2006, p. xxiv). Action research is different from traditional

research because, through reflection, action research practitioners create new ideas about improving their work and immediately implement those ideas as their theories of practice (McNiff, 2017, p. 7). The action research framework provides the vessel of "practical knowing" (Coghlan, 2019, p. 54) in which the researcher can determine problems within a designated community, then design solutions based on community members' involvement and interaction. According to Coghlan (2019), practical knowing is "the knowing that shapes the quality of your moment-to-moment action" (p. 54). Action research is fluid and requires the researcher to respond to the community's circumstances as they change.

Next, I will highlight lessons learned from a preliminary exploratory study that was also done with an action research framework.

Lessons Learned from the Preliminary Exploratory Study

A preliminary exploratory study was conducted to determine current practices in RE across the United States in preparation for this dissertation research. I collaborated with an innovator group, used an action research approach with a quantitative method, and gathered data with an assessment tool developed for the preliminary exploratory study to determine attitudes about their spiritual development choices.

Participants included religious professionals, congregational leaders, and parents across the United States of America who were involved with religious education in the UU church. They were also extremely receptive to and in agreement with the need for change in the current paradigm. They wanted innovative solutions to ongoing concerns related to RE.

The action research team was comprised of seven members. The Unitarian Universalist Association (UUA) divided the country into five regions. The members of the action research team were one representative from each region and two representatives from Pacific Western and

New England regions. For purposes of the preliminary exploratory study, the action research team were referred to as the innovator team. The innovator team sought out participants who were receptive to the need for change, because when learning and getting on board with new ideas, it is best to begin with people who were "innovators and early adopters" (Rogers, 2003, p. 22). Rogers developed the theory of diffusion of innovators in 1962. He found there were five adopter categories which quantify the degree of innovativeness. "Innovativeness is the degree to which an individual … is relatively earlier in adopting new ideas than the other members of the system" (Rogers, 2003, p. 22). The innovators were the people who were excited about new opportunities and want to help lead the way to change. The early adopters were inspired by the innovators and were eager to try new things. People in these first two groups were most likely enthusiastic about a paradigm shift in UU RE and were most likely willing to share experiences and expectations and explore new ideas.

The preliminary exploratory study's assessment tool included Likert Scale statements about the current RE model in use at the participants' congregations. The participants were asked to respond to the statements that numerically ranked their attitudes about their spiritual development choices.

At the beginning of the preliminary exploratory study, I asked the innovator group to consider what they already knew and what they wanted to know about paradigm shifts in religious education programming in the UU church. Each team member did recognize the need for a shift in programming based on familial, generational, and cultural needs. One team member summarized the need for paradigm shift well and said,

> Shifts are challenging but vital for the health of religious education. Change takes a culture shift, and that takes time. I also know that we cannot keep doing things the way we always have. There are generational changes and societal changes that need to be addressed and reflected in our RE ministries.

The team members commented on what they wanted to know about paradigm shifts and others' attitudes and opinions in religious education programming in the UU church. There was a shared interest in what new insights the preliminary exploratory study eventually revealed.

The purpose of this study was to explore attitudes and opinions of parents, religious professionals, and congregational leaders about the need for change in the Unitarian Universalist (UU) Religious Education (RE) models that are currently in use across the United States. The data produced from this assessment revealed gaps that existed in RE models and identified the top three respondents as early adopters of a paradigm shift in RE models in the UU church. It was determined that those early adopters would be ideal participants in a further study about engagement in UU RE and paradigm shifts (model changes).

When the preliminary exploratory study closed, I encouraged the innovator team members to reflect on what they learned about others' attitudes and opinions about their experiences with religious education programming in the UU church. I also asked how they anticipated applying what they learned from their participation in the preliminary exploratory study. They shared that they were not surprised by the preliminary exploratory study results but were frustrated with the time commitment to see this work through and make a culture change. One team member said,

> I am not surprised by the results. The early adopters in my professional life are all open and excited about making and inspiring positive change. The one limiting (frustrating) factor is the amount of time and energy it takes for them to get folx[5] excited and on board and for the culture change to happen. I am thrilled to learn that there is actually energy around and desire for change from parents and church leaders, not just from religious professionals.

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[5] "A variation on the word *folks*, *folx* is meant to be a gender-neutral way to refer to members of or signal identity in the LGBTQ community" (Gender & sexuality dictionary, n.d.).

Members of the innovator team envisioned applying what they learned by spreading the word within the local UU community and sharing that there is a nationwide surge for change. One team member said,

> My role at present is one of support for religious educators. I plan on spreading the good news that parents and church leaders are just as excited about changing the religious education paradigm as we are. We are not alone, and we won't have to do it by ourselves. In general, the preliminary exploratory study produced the measurable data needed to justify a need for further research about changes in religious education in the UU church. Specifically, the qualitative data produced from the attitude scale determined that there was justification for a further study involving an interview and a focus group with one congregation. However, although acquiring information about religious professionals and congregational leaders' attitudes about RE was fascinating and worthy, the core of my curiosity lies with the parents' opinions. Therefore, a study that focuses on the expectations and experiences of the parents is needed.

The conflation of the lessons learned from the preliminary exploratory study and predetermined desired paradigm shifts (as mentioned in Chapter II) resulted in three themes for further research. As mentioned earlier in this chapter, these three themes formed the basis of the three research sub-questions. I also identified goal words for new programming that corresponded to each theme. The three themes, the corresponding paradigm shifts, research sub-questions, and goal words for new programming are outlined below:

1. Acknowledge and fill in the gaps between what is expected and what is offered in faith formation opportunities for engagement. This theme corresponds with Sweeney's (2018) proposed paradigm shift #1, "moving from perfection to process," and supports a RE program that offers impactful and meaningful faith formation opportunities. This theme also corresponds with research sub-question #1: What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents' needs, desires, and expectations of these offerings? The goal words for new programming developed with this theme in mind were *impactful* and *meaningful*.

2. Accentuate multigenerational and lifespan RE opportunities for engagement. This theme corresponds with Sweeney's (2018) proposed paradigm shift #2, "moving from competition to community," and supports a RE program that offers interconnected and attainable faith formation opportunities. This theme also corresponds with research sub-question #2: What multigenerational and UU parenting faith formation opportunities are offered in religious education programs? The goal words for new programming developed with this theme in mind were *interconnected* and *attainable*.

3. Discover and implement alternative methods of engagement. This theme corresponds with Sweeney's (2018) proposed paradigm shift #3, "moving from martyrdom to maintenance," and supports a RE program that offers innovative and sustainable faith formation opportunities. This theme also corresponds with research sub-question #3: What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their needs, desires, and expectations that will help make RE programs more sustainable? The goal words for new programming developed with this theme in mind were *innovative* and *sustainable*.

Table 3.1 shows the synthesized matrix of how the three themes that were extrapolated from the preliminary exploratory study relate to the proposed paradigm shifts in UU RE (Sweeney, 2018) and the research sub-questions.

Table 3.1

Research Question Synthesized Matrix

Corresponding Themes that Emerged from the Preliminary Exploratory Study	Corresponding Paradigm Shift in UU RE and Goal Words	Related Sub-Question
Acknowledge and fill in the gaps between what is needed, desired, and expected in order to support an impactful and meaningful program	#1 perfectionism to process; impactful and meaningful	What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents' needs, desires, and expectations of these offerings?
Interconnected and attainable multigenerational and lifespan opportunities	#2 competition to community; interconnected and attainable	What multigenerational and UU parenting faith formation opportunities are offered in religious education programs?
Develop sustainable and innovative alternative methods	#3 martyrdom to maintenance; innovative and sustainable	What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their needs, desires, and expectations that will help make RE programs more sustainable?

Note. The answers to these related sub-questions informed what the team developed in Phase II of this research study.

Participant Recruitment and Selection

Recruitment for participants in the study was facilitated primarily through Jamili Omar, who had contact information and an established relationship with parents affiliated with congregations in the Baja 4.

There were three criteria for the selection of participants:

1. Affiliates with one of the UU congregations in the Baja 4 conglomerate in Southern Arizona.

2. Identifies as a member of the Gen X (born 1965–1980) or Millennial (born 1981–1996) generations (Dimock, 2019).

3. Identifies as a parent or caregiver of a child (age 0–18) that is involved in faith formation programming at their UU congregation.

Research Design, Data Collection Methods, and Analysis

There is a great need for qualitative data that include feelings-based perspectives to pave a path toward a paradigm shift with a sustainable change in UU RE. Additionally, approaching that endeavor with a collaborative and adaptive leadership mindset is crucial. This research fulfilled that need and, collaboratively and adaptively, lead the impetus for a paradigm shift in UU RE.

The research design involved a qualitative inquiry method of action research and encouraged pertinent community participation and real-time reflection within a specific case study context for sustainable change. The action research team was comprised of religious professionals and key informants. For this research, the action research team was referred to as the innovator team. In this research, the innovator team was tasked with making meaning of and synthesizing the interview and focus group data in an effort to redefine engagement and offer pedagogical indications for the future of faith formation in the UU church.

The data from interviews and focus groups were collected and provided the action research team with insight into Gen X and Millennial parent participants' needs, desires, and expectations. As mentioned previously in Chapter II, Raines and Arnsparger's (2010) and a. m. brown's (2017) generational research studies have noted the need of Millennials for competent and trustworthy leadership. For conducting research with Millennials, this means emphasizing relationships, considering participant preferences, and providing opportunities for self-directed

learning. These elements were honored in the three phases of the research study: interviews in Phase I, new RE engagement pilot program in Phase II, and a focus group in Phase III.

Analysis of the data collected in the three phases of this research study was done by through thematic analysis, frequency tracking, and deep reading. As mentioned and delineated earlier in Chapter I, I used Rubin and Rubin's (2012) guidelines on how to analyze interview transcripts. I monitored the new RE engagement pilot program's progress and participation daily by tracking it with Wix.com analytics and Google Forms. I did a deep read of the focus group transcript and scanned for additional ideas and comments which could contribute to a future iteration of the pilot program.

The research design, data collection methods, and analysis of this study reflect this need to *move at the speed of trust* (a. m. brown, 2017; Raines & Arnsparger, 2010).

Procedures

Prework. I worked with an innovator team comprised of other UU RE professionals. I selected the team members based on their perspective on the need for change in UU RE paradigms and their willingness to think innovatively. The innovator team members were Deb Weiner, Lily Rappaport, Michele Grove, and Emmie Schlobohm. We began prework in July 2020 in preparation for this dissertation research study. The prework included:

1. Created seven interview questions. The interview questions' content was based on the three themes that came out of the attitude scale statements in the preliminary exploratory study. See Appendix A for interview questions. The goal date for completion of interview questions was August 31, 2020.

2. Worked collaboratively with Jamili Omar, Director of Lifespan Religious Education at UU Congregation of Tucson. Created an invitation email to all families affiliated with Baja 4. The goal date for invitation email completion was August 11, 2020.

3. Created a recruitment form using Google Forms. This form included questions about personal contact information and criteria for participation. See Appendix C for Huntereece Dissertation Participant Selection Form. The goal date for recruitment form creation was August 18, 2020.

4. Prepared an ethical participation waiver for final participants. See Appendix D for Consent to Participate with a link for the consent form. The goal date for creating a participation waiver was September 6, 2020.

Phases. This dissertation research study included three phases of qualitative data collection.

Phase I, Recruitment and Interviews.

1. Sent email (created during prework, Appendix B) to families in the Baja 4 with a link to the recruitment form (created during prework Appendix C). The goal date for IRB approval and beginning recruitment was the beginning of January 2021.

2. Continued collaboration with Jamili Omar and gathered completed forms of interested parents from Baja 4. Vetted interested participants with the innovator team. Our goal was to get at least 8–10 participants. Contacted the chosen participants and set up interviews. The goal date for the final participants' decision is the beginning of January 2021.

3. Distributed and collected all consent forms before facilitating an interview with any participant. The goal date for collecting all waivers and scheduling interviews was the beginning of January 2021.

4.   The primary researcher, Amy Huntereece, conducted interviews with participants until

saturation was reached. Approximately 7–10 interview questions were used (developed

during prework Appendix A). Interviews were facilitated virtually on the Zoom platform.

Interviews were recorded, saved to the Cloud, and simultaneously transcribed in Zoom.

Goal dates for interviews were mid-January 2021.

Transcriptions of the interviews were edited, coded, analyzed, and interpreted by the

primary researcher, Amy Huntereece. Rubin and Rubin's (2012) systematic method for thematic

analysis was broken down into eight steps and used for analyzing the interview transcripts. They

suggest eight systematic steps in analyzing interviews.

Step 1. Read through each interview transcript and conduct a high-level recognition of

four elements: concepts (usually a word or term), themes (summary statements and explanations

of what is happening), events (occurrences that have taken place), and topical markers (names of

places, people, organizations, and numbers). I printed each transcript at 2/3 size and left a large

right margin. I used pencil to write notes about parts of the interviews that addressed my research

questions. Rubin and Rubin (2012) also suggest beginning a new document with a tracking

system of notable quotes. I chose to organize my notable quote document according to

participant/page number of transcript/subtheme number (see Step 8 in this process).

Step 2. Read through each interview a second time and add more detail to each of the

four elements (concepts, themes, events, topical markers). Clarify confusing notes, refine

original thoughts with deeper thoughts about the notes, and define concepts and terms according

to what they mean for this specific coding system. I did this with pencil. I combined similar

themes, distinguished subtle nuances within themes by creating subthemes, and discarded notes

that were insignificant to the purpose of this study.

Step 3. Synthesize each transcript by creating a written summary of the contents. I included the following in the written summaries: code number/pseudonym, time and length of interview, main points, identify concepts/themes, summarize central points of each answer.

Step 4. Additional refinement may become clearer and more necessary after creating summaries for each interview. Elaborate on any concepts or themes that need further clarification. I categorized concepts, themes, and central points as new learned concepts, supporting existing learned concepts, and modifications of learned concepts.

Step 5. Integrate the written summaries and additional refinements and establish a coding guideline with definitions and examples. I distributed the coding guideline to the innovator team and made all of the interview transcripts available to them. I invited them to code the transcripts using the coding guideline with designated highlighting colors.

Step 6. Analyze the transcripts a third time by using the more detailed coding guideline. Created a coding structure which reveals an overall relationship between codes. I developed the first list of themes and subthemes. I cross-referenced the notable quotes to ensure that I had examples of each theme and subtheme. I also checked that all seven participants were evenly represented in the notable quotes.

Step 7. Sort all codes with colors. I did this with colorful sticky notes that extended past the edge of the printed transcript. Then, I created new documents by going through all transcripts and extrapolating similar codes (colors).

Step 8. Recognize and refine new concepts and themes by comparing the color codes. Pick out items that are most important for understanding my research topic. I refined and finalized the codes into four main themes and created numbered subthemes (16 total) for each

one. The 16 subthemes were categorized into deductive (preconceived and expected) subthemes and inductive (unexpected and emergent) subthemes.

Goal dates for interpreting data were mid-January through mid-February 2021.

5. At this point, additional collaborators joined the innovator team. These new key informants had expertise in creating educational deliverables in an online format and Waldorf education. It was expected that the new program would be delivered virtually; therefore, online education professionals were useful to the team. It was expected that the new program would be created with cognizance regarding Rudolf Steiner's (1920/1986) indications about the 12 senses; therefore, Waldorf educators were useful to the team. The goal date for a final commitment from key informants was mid-January 2021.

6. Sent a summary of the analysis of interview data to the innovator team and new collaborators using email. Then, met with the innovator team and new collaborators regarding key themes from interviews and developed a new pilot program for engagement in RE for the Baja 4. This meeting was conducted as a one-day curriculum development collaboration retreat day. The date of the retreat was February 13, 2021.

7. Communicated details of the new pilot program for engagement to Jamili Omar by phone. Following the phone correspondence, sent Ms. Omar an advertisement flyer (see Appendix F) and an invitation to any family in Baja 4 that would like to participate in the virtual program. Ms. Omar disseminated the flyer and information about the new virtual pilot program. The goal date for delivery of the new program flyer was February 25, 2021.

8. Summarized biographical details of each participant and wrote short glimpses. Each participant checked and approved the glimpses for inclusion in the dissertation document.

Phase II, Virtual Pilot Program.

1. The new engagement pilot program focused on relevant UU parenting and the proposed 8th Principle ("The 8th Principle," 2017). Religious professionals, parents, members of the congregation, and congregational leaders from Baja 4 were encouraged to engage with the pilot program through the individual congregation newsletters, Facebook, and websites. I posted a daily blog on the UUCT RE website which highlighted specific parts of the pilot program. The goal date for launching the new engagement pilot program plan with the Baja 4 conglomerate was March 1, 2021, but I was able to launch it early on February 21, 2021. The program continued for four weeks and closed on March 21, 2021.

2. I monitored the program's progress and participation daily by tracking it with Wix.com analytics and Google Forms. Goal dates for monitoring were February 21, 2021–March 21, 2021.

3. Separately and simultaneously, the innovator team assessed each engagement opportunity in the new engagement pilot program with the Assessment of Learning Families in Faith Formation, or ALFIFF. This evaluation gave the RE professional the ability to assess the faith formation engagement idea within the new pilot program based on whether the engagement idea included key concepts of the 7 UU principles and Rudolf Steiner's (1920/1986) 12 senses. Critical concepts in the 7 UU principles and Steiner's 12 senses served as the goal elements for each engagement opportunity. See Appendix E for the ALFIFF. Goal dates for assessment were February 21, 2021–March 21, 2021.

4. I created a preliminary report of the findings in the first two weeks of the pilot program and sent it to Jamili Omar. This report constitutes much of the content of Chapter IV of this dissertation, "Findings and Results of the Study." A follow-up email was sent to all

families, religious professionals, and congregants with an invitation to a focus group meeting on March 14, 2021. The report was written and sent to Ms. Omar on March 12, 2021. The invitation was sent to the focus group on February 28, 2021.

Phase III, Focus Group.

1. We convened in a focus group on March 14, 2021. Those in attendance were Kathryn, a participant, Jamili, the Director of Lifespan Religious Education at UUCT; and two members of the innovator team, Emmie Schlobohm and Katannya Hartwell.

2. I read a confidentiality statement in the beginning of the focus group and received consent from every attendee.

   I briefly presented some of our findings from Phases I and II of the study. I encouraged the attendees to offer feedback about their experiences with the interview process and the new RE engagement pilot program. I was interested in their opinions, impressions, and any more thoughts, suggestions, and ideas about how to redefine engagement in faith formation programming in the UU church.

3. After the focus group, I did a deep read of the focus group transcript and scanned for additional ideas and comments which could contribute to a future iteration of the pilot program.

Summary

In this chapter, I explained how I worked collaboratively with an innovator team in three phases (interviews, pilot program, and focus group) of this research study to redefine engagement in faith formation programming in UU congregations. I explained action research as the chosen methodology which enabled other religious education professionals and key informants to contribute to the new engagement program's outcome. I explained the value of

using a case study format for this study to highlight the expectations and perspectives of UU Gen X and Millennial parents in Baja 4.

This important qualitative research provided data and new pedagogical indications based on that data. This work will inform decisions for future spiritual development in RE programs across the continent.

Chapter IV: Findings of This Study

Introduction

In this chapter I will report on the findings of the study. I begin with a brief review of the chapters thus far and restate the research question. Next is a review of the context of the case study and glimpses of the participants. Last, the findings of the three phases in this study are presented by way of thematic analysis. Phase I (interviews) highlights each theme and subtheme that emerged in the interview data. Phase II (pilot study) highlights frequency of engagement through website analytics and Google Forms. Phase III (focus group) highlights reflections from participants and innovator team members regarding the meaningfulness, attainability, and sustainability of the pilot program.

Chapter I provided the background, significance, and approach of this research. Chapter II presented a detailed literature review of the relevant theory, research, and practice regarding the need for a paradigm shift within religious education in the UU church. Chapter III explained the framework, methodology, and design of this study.

The primary research question was: How could UU RE professionals more effectively engage families in faith formation opportunities designed to meet the desired outcomes of UU parents/caregivers?

Case Study Context and Overview of Research Process

This research was a qualitative study using an action research methodology in a case study format. The case study was conducted with parents affiliated with the religious education program in the Baja 4, a conglomerate of four UU congregations in Southern Arizona. The Baja 4 included Mountain Vista Unitarian Universalist Congregation (MVUU) in Tucson, Borderlands Unitarian Universalist Congregation (BUU) in Amado, Sky Island Unitarian

Universalist Church (SIUUC) in Sierra Vista, and Unitarian Universalist Church of Tucson (UUCT).

The research study had three phases. In Phase I I conducted interviews, in Phase II I launched a new RE engagement pilot program, and in Phase III I reflected with a focus group. In Phase I, I conducted interviews with seven participants. I originally intended to interview eight–ten participants, however, due to several interested participants later dropping out and being unavailable, I was only able to secure seven interviews. I analyzed the transcripts of the interviews using Rubin and Rubin's (2012) eight steps of thematic analysis to identify key themes. Next, a description and examples of the key themes were distributed to the innovator team, and they reviewed the data while considering the determined key themes, as well as recognizing any other themes I missed. Then, I revisited the emerging themes in the interview transcripts and conducted a frequency count. Last, the innovator team and key informants created a new RE engagement pilot program based on the data collected in Phase I. In Phase II, the new engagement pilot program was offered to the congregants in the Baja 4 conglomerate for three weeks. Separately and simultaneously, the innovator team assessed 20 engagement opportunities in the new RE engagement pilot program with the Assessment of Learning Families in Faith Formation, or ALFIFF. Participant engagement was tracked with Wix.com analytics and Google Forms. In Phase III, the innovator team met with the participants for one focus group and discussed their experiences with the new engagement pilot program. I shared the key emergent themes from the interviews and participation frequency in the new engagement pilot program. Participants offered feedback on the pilot program and additional thoughts, suggestions, and ideas about how to redefine engagement in RE in the UU church.

Glimpses of Participants

The participants in Phase I volunteered for interviews quickly and eagerly. The process was validating, insightful, and exciting. Table 4.1 below presents demographic information about the participants. All names of participants are pseudonyms. Generation identification is included. As a reminder from Chapter I, Gen Xers were born between 1965 and 1980 and Millennials were born between 1981 and 1996 (Dimock, 2019). Xennials were born between 1977 and 1985 and represent the threshold microgeneration (Lebowitz, 2018) that straddles between Gen X and Millennials. Following Table 4.1 are short glimpses of each participant that highlight details about their needs, desires, and expectations of the RE program in the Baja 4.

Table 4.1

Demographic Data of Participants

Participant Pseudonym	Birth Year	Generational Classification	Number of years involved with UU	Number and school age group of child/ren
Kathryn	1981	Millennial, Xennial	4	One high school, one elementary
Winnie	1971	X	25	One middle school
Jenny	1980	X/Xennial	41 (raised as UU)	One preschool and one toddler
Joy	1976	X	8	One young adult, one high school
Roxy	1982	Millennial/Xennial	6	One elementary and one preschool

Participant Pseudonym	Birth Year	Generational Classification	Number of years involved with UU	Number and school age group of child/ren
Christine	1980	X/Xennial	1.4	One kindergarten and one toddler
Abby	1983	Millennial/Xennial	6	One middle school and one preschool

As seen in Table 4.1, all the participants were classified as either in the Millennial or X generation. Five of the participants classified as Xennials. The oldest participant was born in 1971, and the youngest participant was born in 1983. All the participants were mothers, and the span of all their children's ages ranged from toddler through young adult.

Kathryn, a mother of two children, one teen and one of elementary age, presented herself in the interview as a concerned, educated, interested, and an active UU who volunteered in her congregation's RE program and wanted to help it grow. She is especially skilled at incorporating literature-based resources into RE curriculum. She was born in 1981, which classified her in the Millennial generation. She also classified in the threshold generation, Xennial, however she does not identify with it. She became interested in UU for her family through a Cub Scout/Webelo project as a requirement for religious participation and education. Although raised as Episcopalian, she found interest in Paganism as a teen and was encouraged by her parents to attend the local UU church. At that age she delighted in the congregation's acceptance and trust with her. She most desired a similar environment for her children in a spiritual setting. She strives to create a bridge between her husband's Jesuit background and current Buddhist beliefs with her Pagan inclinations. She needs solutions for connecting UUs across the continent through literature. She expects and appreciates continued accommodation and acceptance of her family's

needs within the congregation. Her tenacity and hope during these times of uncertainty were inspiring.

Winnie, a mother of one middle-school-aged child, presented herself in the interview as a single parent who homeschools her child. She was born in 1971, which classified her as Generation X. She became interested in UU 25 years ago. She strives to model the UU values daily and offer learning opportunities that are nature based and involve wheel-of-the-year rhythm and ritual. She appreciates the succinct language UUs provide in the seven principles as it is consistent with the life she chose for her family. She most desired sustainable online resources for the parent as a primary religious educator. She needs a congregation that is willing to welcome and accommodate her family's special circumstances with love and acceptance. She expects an RE program to provide accountability for both teachers and students regarding behavior and conflict. Her ability to convey her unique perspectives clearly and piquantly was pleasing and helpful.

Jenny, a mother of two children, one preschooler and one toddler, presented herself in the interview as an individual who was raised UU, left during her 20s and 30s, and is now returning as an interested and busy parent of young children. She was born in 1980, which classified her as Generation X. She also classified in the threshold generation, Xennial, however she does not know if she identifies with it. She desires adult faith formation opportunities that will support her own spiritual development. She needs easily attainable resources for incorporating faith formation into her family life spontaneously. She expects a supportive community that provides sustainable, enriching faith formation opportunities that support her efforts to explain the ways of the world to her children through a UU lens. Her curiosity and eager desire to embrace UU parenting were validating and inspiring.

Joy, a mother of two children, both teens, presented herself in the interview as a teacher who is feeling overwhelmed and despondent by the additional expectations, professionally and personally, due to COVID-19. She is especially skilled at clearly expressing her needs and brainstorming possible adaptive solutions for pressing issues. She was born 1976, which classified her as Generation X. She became interested in UU eight years ago when her children were young. She wanted to provide a moral foundation for their upbringing while surrounded by a like-minded community. She deeply desired relevant, not extraneous, faith formation opportunities for her children to manage the extraordinary demands of these current times of uncertainty due to COVID-19, political upheaval, and mandated quarantine. She needs solutions for connecting her teenagers to engaging UU-based activities that are relevant, inspiring, and interesting for them. She expects the RE program to consider the changes in expectations of families in the past year and respond appropriately, effectively, and accordingly. Her forthright, erudite portrayal of the seriousness and struggles of her professional and family life at the moment was poignant and appreciated.

Roxy, a mother of two children, one of elementary-school age and one preschooler, presented herself in the interview as a concerned, educated, interested, and an active young parent. She is especially skilled at bringing issues concerning diversity, equity, and inclusion to the forefront in the UU congregational context. She was born in 1982, which classified her in the Millennial generation. She also classified in the threshold generation, Xennial. She acknowledged identifying with both generational classifications. She became interested in UUism six years ago when she had children and wanted to provide a spiritual foundation for them. She most desired alternative methods of religious education for all ages, offered throughout the week and available asynchronously. She needs a congregation that recognizes and

provides multigenerational and ability-inclusion options for worship and religious education. She feels that this is directly connected to building trust within the community. She expects support from a welcoming, loving, covenanted community, especially regarding childcare during activities that she needs to focus. Her enthusiastic and realistic approach to finding solutions for RE engagement in the future was encouraging and refreshing.

Christine, a mother of two children, one kindergartener and one toddler, presented herself in the interview as an intentional, striving, and active young parent. She is especially skilled at seeking out resources and facilitating group activities. She was born in 1980, which classified her as Generation X. She also classified in the threshold generation, Xennial, and identifies as both. She became interested in UU a year and a half ago after searching for a community that prioritized kindness, respected the earth and others, developed spiritual practice for children. Although raised as Catholic, she found interest in UU but struggles with where to begin as a primary religious guide because she lacks the language and background of UU. She most desired attainable resources to assist her in learning more about Unitarian Universalism. She needs a community of other parents with similar experiences and perspectives, who desire solutions for connecting their children to UU beliefs. She expects and appreciates a welcoming community who can support her in her quest for understanding Unitarian Universalism and then translating it to her children. Her focused curiosity and drive with a deep yearning for community were reminiscent of my own experience as a young mother.

Abby, a mother of two children, one middle schooler and one preschooler, presented herself in the interview as a discouraged, yet hopeful new UU who currently worked for her congregation. She viewed the RE program with both parental and professional lense**s.** She was born in the year 1983, which classified her in the Millennial generation. She also classified in the

threshold generation, Xennial. She identified with both classifications. She became interested in UU six years ago when she began to work for the congregation as an RE assistant. She realized she resonated with the beliefs of UU and desired to incorporate them into the spiritual development for her family. She most desired attainable faith formation opportunities for busy families. She needs those opportunities to include resources for striving parents that do not have background in UU. She expects that engagement will improve when the global pandemic gets under better control and congregants are able to return to the church building. Her enthusiasm, passion, and fresh ideas were encouraging.

Phase I: Interview Findings

Transcriptions of seven interviews were systematically coded, and information was extracted, which led to a thematic analysis. The thematic analysis was both "deductive and inductive" (Fereday & Muir-Cochrane, 2006, p. 81). The deductive themes were preconceived, existing ideas that I had about the needs, desires, and expectations of the participants. The inductive themes were data-driven concepts that were new ideas expressed by the participants. The innovator team assisted with coding to avoid researcher bias and ensure credibility in the analysis of the data from the interviews. Four themes and several subthemes were extrapolated. Table 4.2 shows the themes, subthemes (and their type), and frequencies. Following Table 4.2, examples and explanations of each theme and subtheme are discussed. Several subthemes refer to the parent as the primary religious educator (PRE).

Table 4.2

Themes, Subthemes, and Frequencies

Theme	Subthemes	Kathryn	Winnie	Jenny	Joy	Roxy	Christine	Abby	Totals
Community Total theme frequencies (75)	1.1 Multigenerational engagement opportunities (worship and RE) (Deductive)	1	8	2	0	2	3	3	19
	1.2 UU parents with common values, ages, and stages in life (Inductive)	4	2	4	2	8	4	1	25
	1.3 Welcoming families and acceptance (Inductive)	0	2	0	0	2	1	2	7
	1.4 Grief, missing the supportive, healthy community of church (Inductive)	1	4	1	5	4	7	2	24
Change of Expectations Total theme frequencies (60)	2.1 Modern parents have new expectations of church and they are in favor of full week faith (Deductive)	1	2	2	0	2	2	9	18
	2.2 Parent as PRE at home feels overwhelmed in virtual learning environment (Deductive)	1	2	2	1	2	1	5	14
	2.3 Asynchronous online offerings with alternative times and on demand accessibility are sustainable and less stressful for families (Deductive)	2	1	2	0	3	2	1	11
	2.4 Onset of parenthood inspired desire to engage with a spiritual community (Inductive)	1	1	2	1	1	2	1	9
	2.5 Competition for time is now minutes on a computer and not extracurricular commitments in the busy life of families (Inductive)	1	0	1	2	1	1	2	8

Theme	Subthemes	Kathryn	Winnie	Jenny	Joy	Roxy	Christine	Abby	Totals
Resources for the Parent as the PRE Total theme frequencies (59)	3.1 Millennial perspective of intentional information and values to support the parent as the PRE (Deductive)	1	0	1	0	2	1	4	9
	3.2 PRE desires ongoing support as UU parent, does not want to be alone (Deductive)	1	4	10	2	6	3	4	30
	3.3 PRE needs online resources that are well documented in an accessible format (Inductive)	3	6	5	0	1	4	1	20
Content of Curriculum Total theme frequencies (57)	4.1 PRE desires ongoing Adult faith formation opportunities (Deductive)	1	8	3	0	2	4	1	19
	4.2 Alternative format for delivery of content: Kids are unmotivated and tired of screens and Zoom, "Zoomed out" (Deductive)	2	2	2	1	1	1	1	10
	4.3 Meaningful content is relevant to the times, not extraneous and unrelated (Inductive)	0	1	1	6	1	1	1	11
	4.4 Online faith formation programming that is impactful and accessible, like Parents of Preschool Students (POPS) (Inductive)	0	0	7	0	1	7	2	17

Note. Some subthemes with lower frequencies were eliminated from the analysis and final table.

Table 4.2 shows four themes—community, change of expectations, resources for the parent as the PRE, and content of curriculum—in descending order according to the frequency

each participant mentioned each theme. These themes and subthemes are discussed in detail in the following sections.

Theme 1: Community

Participants described the desire for support, socialization, and a sense of sharing common values with a group of people in a spiritual community. This occurred in a reminiscent tone for days gone by and/or in reference to the current virtual community in which they are involved in the Baja 4. This theme was the most frequently mentioned in the interviews out of all four themes. Roxy referred to the Baja 4 virtual worship services and the parent support group on Facebook, and shared hopes for the continuation of both supports in the future, even after the pandemic. Roxy said,

> I really, really hope that we think about how [having online services] can continue after the pandemic and then I also really love the Facebook group and hope that it still has as much energy once people are back in person. Because even though it might be like geographically closer to gather, it's not like we're not going to be any less busy right and so sometimes like the time you have to connect with people, it's like 10pm after your kids are in bed and you're like talking about something that happened. On social media with your other UUs.

Several participants expressed gratitude for the Parents of Preschoolers (POPS) program that was started in Baja 4 in the fall 2020. The participants shared their gratitude for the social and supportive virtual environment during the pandemic. Jenny said, "We've been trying to foster a community of support for parents to kind of talk to each other … I felt seen as a parent." Christine echoed Jenny and shared,

> I've appreciated just the opportunity to expand my acquaintances. And find or do some good sharing, which there's definitely a lot of commonalities. Not just with the age group, but [with] what everybody is experiencing [with the pandemic].

Winnie spoke to the essence of this theme in stating, "I think that it is important to have a healthy thriving community for long term sustainability and that [the children] can, in community, see that in action."

Four subthemes emerged from the first theme, community. The deductive subtheme was (1.1) support for multigenerational engagement opportunities both in worship and religious education. The inductive subthemes were: (1.2) seeking other UU parents with common values who share similar ages and stages in life, (1.3) feeling welcomed and accepted in the congregation, and (1.4) expressions of grief and missing the supportive, healthy community of the church. Subtheme (1.1) emerged as several participants were in favor of multigenerational opportunities offered in both worship and religious education settings. Joy saw value in learning from the experiences of the older generations to help the younger generations in their struggles with the pandemic. Joy said, "especially with the way things are going right now because I feel like the wisdom that would come from the older folks would be really helpful for the children." Joy envisioned that interaction as an informal conversation. Alternatively, Roxy appreciated the multigenerational opportunities for interaction that are preplanned. While discussing an area in the corner of the UUCT worship space called the "soft corner," Roxy shared,

> It's for anyone who needs to sit in a soft place and move around a little bit and I like that it's part of worship, because I like the message that it sends to everybody in the congregation that there are all sorts of different needs, people listen in different ways. It's okay, that there's movement and activity. It's okay for people to be laying down. I think it releases the message of multigenerational inclusion.

Roxy also shared the value of offering religious education in multigenerational formats. She appreciated the real-time opportunities for her children to feel safe while they work through conflict with others in the class. Roxy said,

> Sometimes in their RE classes, they don't particularly get along with [others] and they might not have chosen [that person] as a friend and they still got to figure it out because

that's part of their community … You don't have to hang out all the time, but … how are you gonna figure out [how to be together] … I really appreciate the UU community for … teaching that concept.

Many participants expressed their grief and yearned to meet with their community once again in a live setting. Christine shared her excitement when she found out about a UU parenting group of similarly aged parents with common values (subtheme 1.2). Christine said, "[I brought] some interesting [resources] to the group and that is really cool because I don't have any other friends like that." Christine also described her surprise and appreciation for the wonderful welcome (subtheme 1.3) her family received on their first visit to their congregation. That experience has influenced her perspective on the importance of a supportive spiritual community for her family. Christine shared,

> I think that the most important thing to me is a sense of community… [my daughter] had, like, 100 new friends and technically like 100 new grandparents instantly and that sense of community hasn't been lost in the pandemic … the community that is built around [my congregation] is … the community that you want.

Comments about grief related to community were categorized as subtheme (1.4). Roxy shared her grief related to the struggles of parenting during a pandemic when so many of us are isolated. She pines for opportunities lost for her children to interact with other adults and children. Roxy poignantly expressed, "The one thing I can't do as a parent is create a community for my kids by myself … It sucks to have no access to community when you really need community most, when things are hard in a pandemic."

Theme 2: Change of Expectations

Participants described the feeling or experience of frustration, overwhelm, or resistance related to the need to change and recalibrate expectations. This theme showed up as a loss of normalcy due to COVID-19 and loss of socializing with friends live due to quarantine and online education. This also showed up as a desire to change the paradigm and format of religious

education from the Sunday school as the only model to a model that offers faith formation

throughout the week. With a sense of surrender, Kathryn pointed out the reality of this theme,

"There is definitely a need for a change to fit, you know, parents don't do church, the way they

did 20 years ago or even 10 years ago. Or heck last year." Roxy concurred with the need for

change in the RE paradigm and stressed the importance of remaining flexible. Roxy said,

> I don't feel like a rigidity around [RE] has to be on Sundays and it has to be something
> separate for kids and has to be during worship, like I'm fine with having a family
> worship, you know, either in person or that we just watch online. But then there's
> opportunities for me to me with other people and community and there's options for our
> kids be other people in community, maybe they are at the same time, maybe they are at
> different times. I feel flexible and how that all works.

Five subthemes emerged from the second theme, change of expectations. The deductive

subthemes were: (2.1) modern parents have new expectations of church and they are in favor of

full week faith, (2.2) parent as PRE at home feels overwhelmed in virtual learning environment,

and (2.3) asynchronous online offerings with alternative times and on-demand accessibility are

sustainable and less stressful for families. The inductive subthemes were: (2.4) onset of

parenthood inspired desire to engage with a spiritual community and (2.5) competition for time

is now minutes on a computer and not as much extracurricular commitments in the busy life of

modern parents and kids. Abby felt passionate about subtheme (2.1), the need to change the

religious education paradigm and shift to a more attainable model for today's modern parents.

Abby recognizes opportunities for faith formation at home every day and does not see value in

pigeonholing religious education to "only an hour on Sundays." Abby continued her thoughts

about the Sunday only RE model later in the interview and said, "I think it's good that people are

trying to move away from just one Sunday programming. That was like old school. So, we're

moving into this different school of thought that it's, not just on Sunday." Instead, she advocated

for programming throughout the week. "I really love … having to offer something like midweek

… I feel like having church on Sunday is [not] enough to build lasting relationships." Roxy highlighted the pressures involved with parenting during a global pandemic that are highlighted in subtheme (2.2) and applauded the vulnerability of the UU parent support groups that she has turned to online during these times of uncertainty. Roxy shared,

> [It] is really helpful to feel like there's a community of people who are just real about how hard this is to parent without school or childcare and work all at the same time, but it's possible. And like having other new parents who are like, Yes, same. Also impossible. Also feeling like a failure.

Abby also valued and advocated for asynchronous faith formation opportunities to move away from the Sunday-only religious education model (subtheme 2.3). Abby affirmed, "I like the concept of doing it whenever you have a free minute, yeah, everybody's schedules are so different." Jenny spoke to the convenience and sustainability of meeting online during the week (subtheme 2.3). At first, she did not expect that a preschool crafting project could possibly be successful in a virtual setting, but she was pleasantly surprised. Jenny shared, "The Zoom stuff, crafting with the kids, actually worked out better than I thought it would. It is essential right now with the pandemic. And also, it fits in with our life really well." A noticeable change in desire to interact with a spiritual community arose for several participants at the onset of parenthood. They found themselves shopping for a congregation and faith that was consistent with their own values and beliefs (subtheme 2.4). Christine was raised Catholic but no longer resonates with Catholic values. She remembered challenging the religious system as a youth and was not encouraged to explore her curiosities. That experience impacted her choice of a spiritual community for her own family. She revealed, "I don't want for her whole experience to be the anti-experience of my experience I want her experience to be its own thing and I don't even really know what that is." Christine admitted "whatever vision that I had for, wanting to create this experience of being in a faith community, wasn't happening exactly the way I thought it was

[going to]." In support of subtheme (2.5), Abby described the busyness of family life and the

overwhelm of screen time:

> [RE is] competing now with other minutes on the computer … you know before it was … soccer games and baseball games and family get togethers and stuff or you know go to the zoo, now … they need to get off the computer. We can't attend … this month because they've just been on the computer so much.

Abby added her perspective as a facilitator of a small group. "You want to create content that

[parents] could do on their own to relieve the stress…it's really tough right now in my opinion to

engage and get people to show up." Kathryn concurred with Abby and said, "Kids don't want to

do Zoom, so, what other options could be had that we don't do?."

Theme 3: Resources for the Parent as the PRE

Participants described the need and great desire for resources to support parenting

endeavors and/or learning about UU religion for their own enrichment. Winnie is a busy mom

and identifies strongly as the PRE for her homeschooled child. She is comfortable with

delivering engaging lessons but seeks support in finding resources to create the lessons. Winnie

shared, "[I need] someone else to be a resource gatherer … create a whole list of topics …

because finding those resources takes time and when you're engaged with so many other things,

as a parent, you don't necessarily have the time to research." Christine is not as comfortable as

the primary religious educator. She is new to UU and does not have a community of other UU

parents for support. She often wonders if her efforts in providing spiritual guidance and

education for her children have any basis in UU theology. She greatly desires resources that can

connect her with other UU parents who are experiencing the same ages and stages in parenting.

Christine reminisced about a recent conversation with her child, "[my daughter and I] talked

about it and whatever type of thing that she can feel and imagine, is right and true, and it's so

beautiful." Christine feels good about that approach and has found comfort in "even just the, the

idea of Unitarian Universalism," but shared her struggle with self-doubt. She shared, "even when you feel good about something, you're just like, well, maybe I'm not doing it the right way."

Three subthemes emerged from the third theme, resources for the parent as the PRE. The deductive subthemes were (3.1) Millennial perspective of intentional information and values to support the parent as the PRE and (3.2) PRE desires ongoing support as UU parent, does not want to be alone. The inductive subtheme was (3.3) PRE needs online resources (books, podcasts, and stories for kids) that are well documented in an accessible format such as and email, text, social media, website, or Google Drive. Abby highlighted the importance of Millennial parenting choices in subtheme (3.1). She discussed her intentional choices about the spiritual community of which she chose to become a part based on her values. Abby values "trying to teach [our children] wholesome concepts and helping them be better people… I feel like you can never have enough of that to just raise good kids overall." Subtheme (3.2) highlighted times when participants commented on the complicated challenges of parenting during these present times of living during global pandemic. The isolation has left many of them feeling all alone in their parenting endeavors. Joy shared, "It's so hard to please these kids at this age and generation, I feel like, you know, we're just kind of like, whatever, and then now we have a pandemic, so that doesn't help." Roxy shared her gratitude for the supportive outlets she has found online during these challenging times. Roxy referred to the UUCT parenting Facebook page and the connection she feels to other UU parents. She said, "other parents post regularly like articles, or their needs, or encouragement and that has been really helpful that feeling of like, you're not alone in what you're trying to do" (p. 5). Jenny spoke to the essence of subtheme (3.3) as she recalled her gratitude for situations where UU parenting resources are shared *and* are

noted somewhere for future reference. She shared, "those resources are really helpful. I love having it in writing, if it's a passing comment, I just don't remember."

Theme 4: Content of Curriculum

Participants described ideas and desires for the content of the curriculum and/or how to implement them in a meaningful, accessible, and/or sustainable way. Christine felt that content is best when derived organically. When a parent can guide a child through a curious conversation about spirituality with grace and humility, the content presents itself. Christine said, "in informal education work, the idea of being more of a guide or a coach … [supported that] you don't need to know it all, you asked a lot of questions and the learning kind of evolves from there. And that is, totally the way that it has worked with [my daughter] and [it] ends up being so beautiful."

Four subthemes emerged from the fourth theme, content of curriculum. The deductive subthemes were (4.1) PRE desires ongoing adult faith formation opportunities and (4.2) alternative format for delivery of content: kids are unmotivated and tired of screens and Zoom. As previously mentioned, subtheme (3.2), UU parent as the PRE desires ongoing support, is similar to subtheme (4.1) with the distinction being when participants expressed feelings of being alone (3.2) or the need for ongoing adult faith formation opportunities (4.1). The inductive subthemes were (4.3) meaningful content is relevant to the times, not extraneous and unrelated and (4.4) online faith formation programming that is impactful and accessible, like Parents of Preschool Students (POPS). I noted that subthemes (4.2) and (4.4) contradict each other. Abby expressed her feelings of inadequacy as a PRE and her desire for more adult education to help her understand the historical and theoretical foundations of UUism (subtheme 4.1). She spoke to the essence of this theme and stated,

> Sometimes I feel like, I don't even know the religion that well, so how can I teach the kids? But that's my own personal lack of looking into it. Sometimes it seems like when

you think of it as this huge thing, breaking it down into smaller [lessons] you know, the whole task feels like too daunting … but if someone broke it down into little pieces and fed it to me, you know little bits at a time, I feel like I can retain it and figure it out better … I always feel like [if] I lack religion for myself, I feel like, then I can't really convey it to the kids because I don't fully understand it.

Christine agreed with Abby and shared her desire for

The creation of a spiritual practice within our family, I didn't even know where to start … if you don't have the religious background, and what I was experiencing in services in a small way was like picking up on the history of UU and you know, this and that, but I don't have enough time to read any books right now. I can't even stay awake.

Kathryn frankly shared her experiences with her teens and the virtual setting (subtheme 4.2). She

said,

We're all doing Zoom and it's really hard to get kids to do something else on a computer … my high schooler [is] very dedicated but you know he's on the computer for eight hours, Monday through Friday and to tell him to get on for another hour on Sunday, it's like, no I am not doing that.

Joy expressed her frustration with the irrelevance of what curriculum was offered (subtheme

4.3). She deeply desired content that was relevant to the current times of uncertainty and change.

She illustrated this and said,

I might try a little bit harder to attain … whatever is being offered if I felt like it was not extraneous, it feels extraneous right now. Like if we had something that was about dealing with grief and the feelings of COVID-19 and the feelings of how things have changed how school has changed for kids in school age. I feel like maybe I would want to take part in it more, but right now it just feels like extra stuff.

Without realizing it in the beginning of the POPs program, Christine surprisingly deduced that

involvement with POPs was perfect for her family (subtheme 4.4). She exclaimed, "whoa, this is

exactly what I wanted … I feel like the goals of the group are pretty clear that we're just, you

know, we're there to like support one another, share, learn … It's very attainable and digestible."

Summary of Phase I

The seven UU parents interviewed offered their needs, desires, and expectations of UU faith formation programming in detail. Four themes, community, change of expectations, resources for the parent as the PRE, and content of curriculum, emerged from the comprehensive interview data. The four themes represented a broad understanding of the data. Each theme included several subthemes which provided a detailed perspective of what the participants described. Several subthemes related to others and had only slight nuanced distinctions between them. The data collected in Phase I directly informed the innovator team's work on a curriculum development retreat. During the retreat, the innovator team developed the new RE engagement pilot program, which was launched in Phase II of this research study.

Phase II: Pilot Study

The new Baja 4 RE engagement pilot program was a result of the synthesis from the interview data. The new RE engagement pilot program included five areas where corresponding resources were provided. The five subject areas were:

1. PLAY: movement activity ideas that were thematically organized,

2. DO: go somewhere, participate, and experience in a social justice related activity that encouraged youth to get involved,

3. DWELL: supported parent as PRE by providing a restful moment that encouraged mindful and intentional parenting,

4. SHARE: connections and social time on virtual platform,

5. DIVE: a resource hub to assist the participant in going deeper by reading, listening, and watching. Divided into "for the kids" and "for the grown-ups."

The program was launched on the UUCT RE website on February 21, 2021, and use was monitored through March 14, 2021. Figure 4.1 below shows a screen shot of the home screen for the pilot program.

Figure 4.1

Home Page for the New Baja 4 RE Engagement Pilot Program

Note. Participants engage with the program by navigating easily between themed bubbles. Once a themed bubble is selected, a variety of activities and engagement ideas related to that theme appear. From "New RE engagement pilot program," by A. Huntereece, 2021, https://dreuuct.wixsite.com/uuquest. Copyright [2020] by Jamili Omar.

I used the Wix.com analytics and Google Forms to monitor user engagement. The innovator team and I evaluated 20 engagement opportunities in the new RE engagement pilot

program with the Assessment of Learning Families in Faith Formation, or ALFIFF (see

Appendix E).

Analytics through the Wix.com website were used to track website traffic. I compared

frequency of sessions on the website over a six-week period, three weeks prior (January 30,

2021–February 20, 2021) to the launch and three weeks during (February 21, 2021–March 14,

2021) the launch of the new Baja 4 RE engagement pilot program. Website traffic in the three

weeks prior to the launch of the pilot program produced 34 total visits. In the three weeks during

the pilot program, there were 139 total visits. Figure 4.2 shows the comparison of the two three-

week time periods with frequency of website sessions.

Figure 4.2

Comparison of Website Traffic
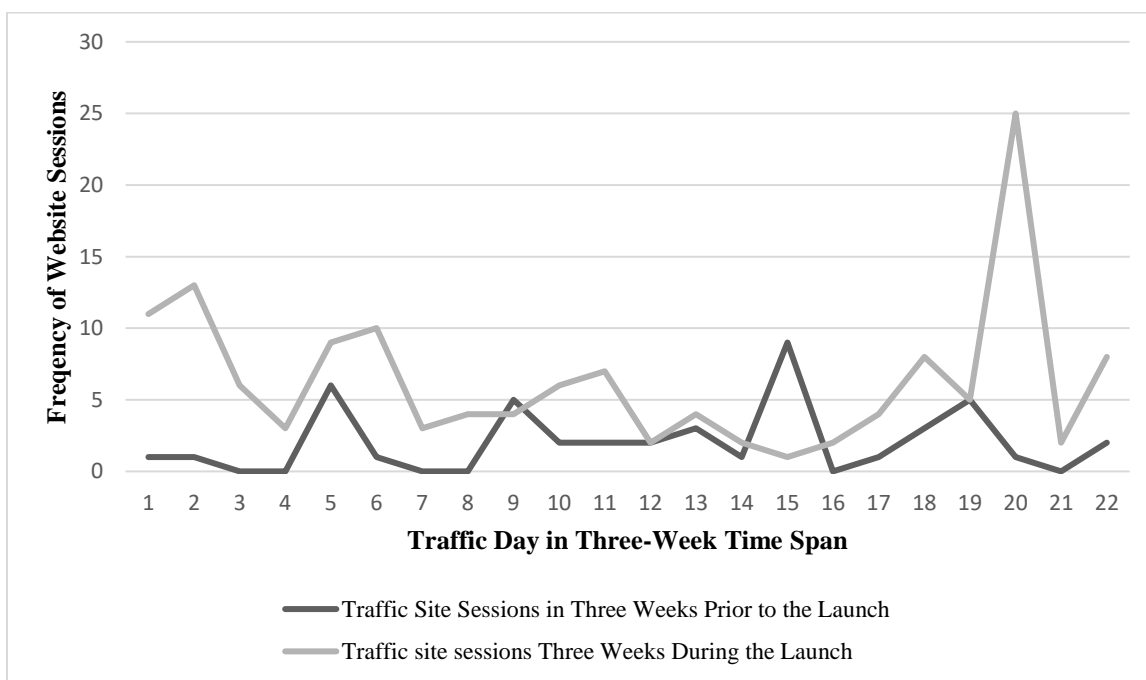
More analytics revealed that traffic to the site increased by 209% during the time of the

pilot launch. There were 47 unique visitors, 78.7% were new visitors, and 21.3% were returning

visitors. Table 4.3 shows how many sessions occurred and pages that were viewed per day

during the three-week launch of the pilot program.

Table 4.3

Website Sessions and Page Views

Traffic Day	Site Sessions	Page Views
1	11	28
2	13	34
3	6	15
4	3	5
5	9	24
6	10	35
7	3	3
8	4	5
9	4	5
10	6	9
11	7	19
12	2	3
13	4	24
14	2	3
15	1	1
16	2	4
17	4	21
18	8	10
19	5	7
20	25	43
21	2	2
22	8	65
Total	139	365

Note. The peaks in the above table are attributed to email reminders and updated content on days

2, 6, and 20. The lowest activity was seen at about two weeks into the pilot launch. Less activity

could be attributed to a break in blogging (see Table 4.4 below for March 6–8) and no new

content to view.

Blog post hits were tracked within the Wix.com system as well. A total of 17 blogs were

offered during the three-week launch period. A total of 93 blog views were tracked.

Table 4.4 shows how many blog views were counted on each day of the three-week launch

period of the pilot program.

Table 4.4

Daily Blog Views During Three-Week Launch Period

Date	Blog Post Views
02/21/21	6
02/22/21	9
02/23/21	5
02/24/21	1
02/25/21	9
02/26/21	10
02/27/21	2
02/28/21	0
03/01/21	0
03/02/21	3
03/03/21	6
03/04/21	1
03/05/21	10
03/06/21	0
03/07/21	0
03/08/21	0
03/09/21	5
03/10/21	3
03/11/21	3
03/12/21	10
03/13/21	0
03/14/21	10
Total	93

Note. Blog post views were typically viewed on the day of the post. Most days with zero views

were the day of or day after a blog was not posted.

I acquired more specific user information by using Google Forms. Links for optional

"registration" and "sign off" forms were offered through the pilot program interface. Twelve

sessions were registered. Representation from every congregation in the Baja 4 except Sky Island

registered at least once.[6] Users from outside of Baja 4 represented 58.3% of the registered

sessions. Most of the 12 total sessions "registered" were just checking out the pilot program

(88.3%). One user returned to look for an activity to use later, and one user indicated the

intention of the engagement was to immediately participate in the activity with a group of people

other than family. Only two users chose to "sign off" after using the pilot program. They both

shared high scores (average 4.5 on a scale of 1–5) in meaningfulness, attainability, and

sustainability of the opportunities offered through the pilot program. Based on the data collected

from the Wix.com analytics, 91% of the site sessions were not "registered" within the pilot

program interface with the Google Form.

　　　　I created an original assessment to track the applicability of the 13 key concepts of the 7

+ 1 UU principles and Steiner's 12 senses. The assessment was adapted into a Google Form, and

one other member of the innovator team and I evaluated a sample of engagement opportunities

included in the new RE engagement pilot program. There were 20 engagement opportunities in

the sample. That evaluation gave us the ability to judge the RE engagement opportunities based

on whether they included the 13 key concepts of the 7+1 UU principles and Steiner's 12 senses.

All of the 7+1 UU principles' 13 key concepts were represented in the sample. Two key concepts

(worth and connectiveness) occurred in 15 of the 20 engagement opportunities. The key concept

that occurred the least (4 in 20 engagement opportunities) was freedom. Results of frequency of

occurrences of the 7+1 UU principles' 13 key concepts appear in Figure 4.3.

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[6] Sky Island is a retirement community and does not have any members that are families with

children.

Figure 4.3

Frequency of Occurrences of 7+1 UU Principles' 13 Key Concepts
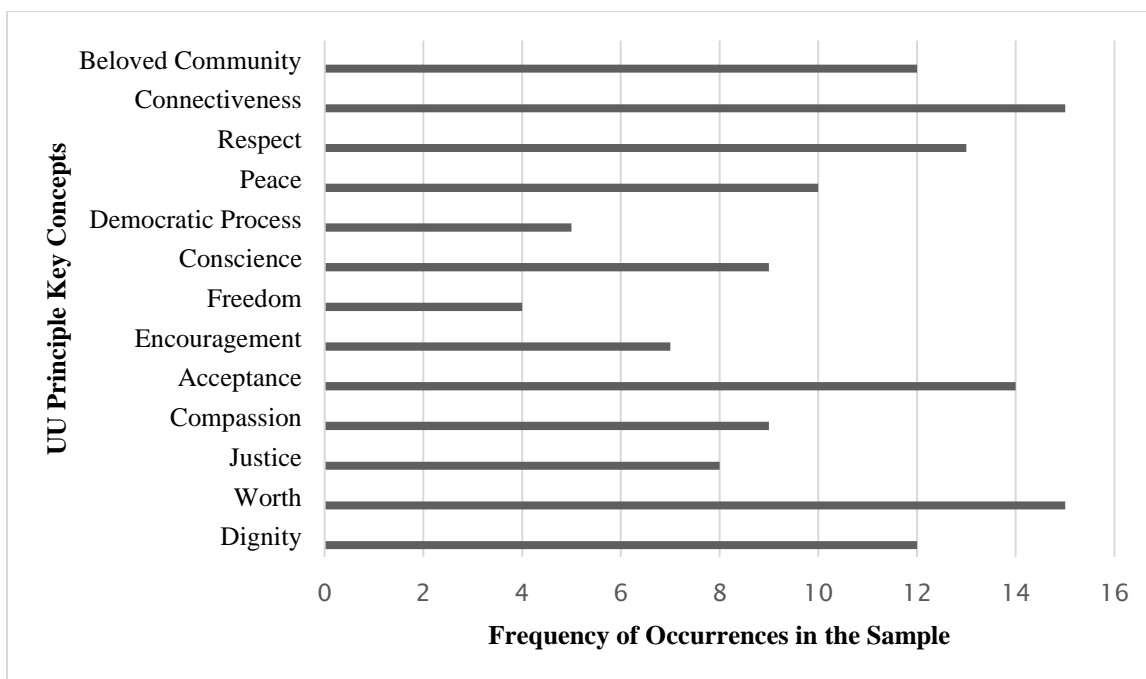
All but one of the Steiner's 12 senses, smell, were represented in the sample. Taste only occurred in one engagement opportunity. Thought occurred most frequently (16 in 20 engagement opportunities). Results of frequency of occurrences of Steiner's 12 senses appear in Figure 4.4.

Figure 4.4

Frequency of Occurrences of Steiner's 12 Senses
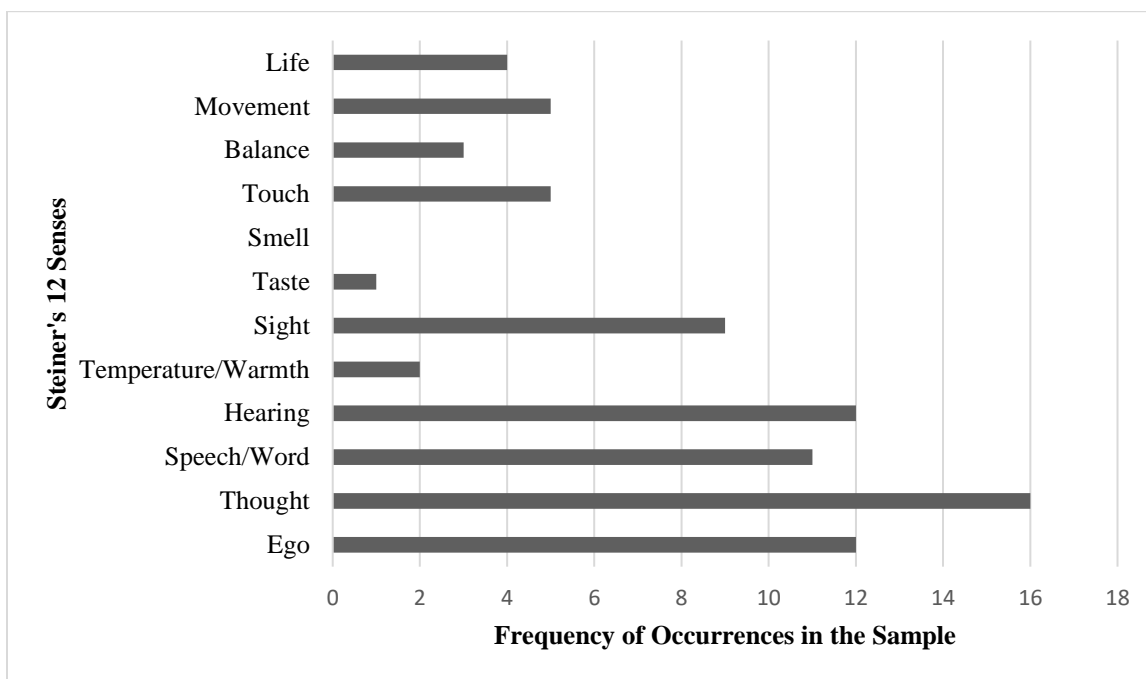
Summary of Phase II

The new RE engagement pilot program was a result of the synthesis from the interview data. The program was launched on the UUCT RE website (https://dreuuct.wixsite.com/uuquest) for three weeks. Frequencies of website sessions were tracked using Wix.com analytics and Google Forms. Efficacy of engagement opportunities regarding 7+1 UU principles' 13 key concepts and Steiner's 12 senses was measured using the ALFIFF.

Phase III: Focus Group

On March 14, 2021, the innovator team, key informants, and one participant met for a focus group and discussed their experiences with the new RE engagement pilot program. Anyone who engaged with the new RE engagement pilot program was welcome to attend and contribute to the focus group. Those in attendance were Kathryn, a participant; Jamili, the Director of Lifespan Religious Education at UUCT; and two members of the innovator team, Emmie

Schlobohm and Katannya Hartwell. I read a confidentiality statement in the beginning of the

focus group and received consent from every attendee. Next, I briefly presented some of our

findings from Phases I and II of the study. Then I opened the floor to the attendees and asked for

feedback on the new RE engagement pilot program. I was interested in their opinions,

impressions, and most of all if they felt the pilot program was meaningful, attainable, and

sustainable.

Jamili was curious about what surprised the innovator team during interview data

analysis. I shared, "I was not expecting to see grief as a dominant theme, and … almost every

participant talked about grief … on multiple levels, it was … related to COVID-19 and …

resistance to changing expectations of how do I live now and how do I do this." Kathryn

reinforced how grief shows up in the RE young adult class that she is currently facilitating.

Kathryn emphasized how meaningful, updated curriculum around grief management is greatly

needed for UU congregations both now and continuing into future planning.

> We're not taught in school or even with our own families, how to deal with grief … we're taught; to culturally deal with things, you put it aside and you deal with it later. Rather than, processing our emotions in a healthy way. So, I think there's value in not just teaching kids … or just teaching religious educators, but in teaching everybody how to deal with grief.
> Kathryn and Jamili were excited about the attainability of the new resources that were

highlighted in the pilot program. Project Octave (Blosser, 2021), an engaging, virtual activity

that focuses on the eighth principle for older kids, was discussed as a possibility for future

engagement with the middle- and high-school age group. An innovator team member Emmie

Schlobohm had experience with the project and described it to the group,

> It's an escape room and there's all kinds of information … a host file folder has basically a step-by-step script of how you do it and it's very engaging because the host … is in the chat box and they're called Octbot. I'm just thinking of it in a family setting, it would actually be really fun… it's very engaging and, it is all around the eighth principle which is lovely.

Emmie spoke to the importance of this study and the potential impact it could make on the current perspective of religious education in the UU church today. Emmie emphasized,

> The results [revealed that] everything I'd been trying to tell … through district and continental level conversations, was affirmed. I'm also frustrated I because this whole full week faith idea or keep things available for people is really what families want but [DREs are] paid to do something on Sunday … somebody's going to have to get it through to the powers that be, whoever they are, in whatever congregation, that maybe we need to be okay changing the paradigm, and maybe we need to give our religious educators support in making that happen … this study to me, is very powerful in that it's basically like this big flag that's being waved.

Emmie's portrayal of the immediate need for a paradigm shift in UU RE gave support to the sustainability of the focus of this research. Jamili concurred and commented on the impact of the study,

> The way that it's affirming what we know, just from our conversations with the people we serve, that yeah, it's a good reminder that the power of just listening to them … and hear what they need or hear what they're saying. And it goes against what we think of as conventional wisdom, that's actually what's real now rather than what somebody said all this long time ago. [The supportive congregational leadership at UUCT can] take this learning then [determine] how can we implement it; I think that's the big question because we've got some time now to plan for it.

Jamili expressed concern for sustainability of implementation of ideas around a paradigm shift in congregations that do not have supportive congregational leadership. She pointed out, "I imagined congregations that don't have those pieces in place, that don't have the leadership aren't having the same conversations and how painful that's going to be for so many people around those congregations."

Summary of Phase III

In the focus group, I learned that the pilot program was meaningful, attainable, and sustainable. Cognizance of the need for grief management awareness brought meaning; synchronous and asynchronous resource links brought attainability; supportive and open-minded congregational leadership brought sustainability to implementing a paradigm shift in the Baja 4 RE programming.

Synthesis of All Three Phases

The findings from Phase I of this research confirmed several preconceived inclinations about how parents feel about UU RE. The study also revealed some parents' needs, desires, and expectations which were not expected. During the curriculum incubator retreat, the innovator team reviewed our mission (why), vision (what), and strategies (how) for redefining engagement in UU faith formation.

Our mission was to support *modern parents* in their desire to provide spiritual development for themselves and their families. We envisioned ourselves as dot connectors. We did not intend to create original content but, instead, connected parents with existing quality resources. The engagement offerings that we provided support an independent once-and-done format. Each lesson stood alone. The pilot program was not dependent on "a specific time" for engagement. All offerings were *attainable* and could be accessed 24/7. We attempted to provide engagement opportunities that were multigenerational whenever possible and appropriate. We attempted to provide engagement opportunities that were *sustainable* for Baja 4 beyond the completion of this study. We attempted to provide engagement opportunities that were *meaningful* and relevant, not extraneous, for parents and families. The strategies for the new RE engagement pilot program were based on both the expected and unexpected themes that were the most emphatic and concerning topics. The emphatic and concerning topics centered around resources based on the proposed UU eighth principle.[7] The resources were categorized into one of the following five themes: play, do, dwell, share, and dive. The new RE engagement pilot

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[7] "We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote: journeying toward spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions" ("The 8th Principle," 2017).

program was offered in a virtual platform. I found that participant interaction and engagement were variable. I found that participants did not choose to register or sign off on most interactions with the pilot program. I also found that participants were more engaged with the pilot program on the day of and after a reminder or blog posting. Representation of the 13 key concepts from the 7+1 UU principles and 12 senses as indicated by Steiner (1920/1986) was evident except for smell. In Phase III, the focus group meeting provided space for the innovator team, key informants, and participants to share their impressions and reflections about the new RE engagement pilot program. We discussed the frequencies of interaction and engagement with the pilot program and determined that the register/sign-off process would be best to change in the future. We also discussed the ALFIFF's role in assessing the engagement opportunities in the new RE engagement pilot program and determined the necessity for providing the program in a virtual setting affected the incorporation of some of Steiner's 12 senses. In the style of action research, in this study, each phase was planned, implemented, reflected upon, and refined to inform and lead into the next phase.

Conclusion

The data presented in this chapter showed how I created a meaningful, attainable, and sustainable pilot program for the Baja 4 UU RE program. The thematic analysis of the interviews revealed significant needs, desires, and expectations of UU parents/caregivers. Synthesis of that data assisted the innovator team and me in the creation of the pilot program. Participation in the pilot program for the three-week launch period and further reflection by the participants of their preferences gave way to rich conversation in the focus group.

In Chapter V, I will examine and discuss the findings from Chapter IV. I will consider some of the literature and current research highlighted in Chapter II and compare them to the

findings in this chapter. Finally, I will make some recommendations based on my findings and consider how this study may lead to future significant areas of research regarding a paradigm shift in UU RE.

Chapter V: Discussion

Introduction

In this chapter I begin with an overview of why and how this research was done. The research question that was addressed in the study is: How could UU RE professionals more effectively engage families in faith formation opportunities designed to meet the desired outcomes of UU parents/caregivers**?**

The sub-questions are:

1. What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents'/caregivers' needs, desires, and expectations of these offerings?

2. What multigenerational and UU parenting faith formation opportunities are offered in RE programs?

3. What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their articulated needs, desires, and expectations that will help make RE programs more sustainable?

Next, I discuss the interpretations of the findings from Chapter IV and relationships between the findings from the study and the larger body of related literature are highlighted in Tables 5.1, 5.2, and 5.3. Practical contributions of this research to UU faith formation are explained, and I offer a conceptual model, based on the findings of this study, called the Lotus Faith Formation Model. Next, implications for leadership and change and the impact which COVID-19 had on the research process are considered. Then recommendations for future research are proposed. Last, limitations and reflections about the process of the research are shared before the conclusion.

In Chapter I, I exposed how UU religious professionals feel restless and often impatient for a paradigm shift in UU RE. The impetus for the shift is the realization that a movement to

rethink and restructure the current model is warranted by modern UU parents. Faith formation programming that is meaningful to the modern family, attainable with modern technology, and self-sustaining is desired. In Chapter II, I emphasized that research on a rethinking and refreshing of faith formation models is emerging across many faith traditions. Religious education professionals have felt the need for redefining engagement in UU RE for at least a decade and have worked on this in the field, but there is a dearth of research on it. In Chapter III, I focused on the research design and procedures of the study. Incorporating a case study approach with the methodological framework of action research was the research approach for this study. I developed a three-phased design which tapped into the opinions and perspectives of the participants. They answered interview questions (Phase I), participated in a new RE engagement pilot study (Phase II), and contributed to a focus group (Phase III). The research done in this study confirmed UU parents' desire for a new RE model and revealed that the widespread changes in RE that are occurring across several religions. Although this research study focused on a specific conglomeration of UU congregations in Southern Arizona, the Baja 4, the study underscored the value and importance of social intent for other UU congregations across the continent and emphasized how social context may contribute to a paradigm shift in UU RE. Next, I will organize the findings of this research by research sub-questions.

Interpretation of the Findings

This study integrated three research sub-questions centered on the primary research question, how UU RE professionals could more effectively engage families in faith formation opportunities designed to meet the desired outcomes of UU parents/caregivers. This section reexamines the research sub-questions that framed this study and interprets the findings based on the data analysis from all three phases of the research. The findings of this research confirmed

several preconceived inclinations about how parents feel about UU RE. The preconceived

inclinations originated from the innovator team and previous research prior to COVID-19. The

study also revealed some parents' needs, desires, and expectations which were not expected.

Most of the unexpected findings were influenced by the onset of COVID-19 and act as a

springboard toward recommendations for useful action in redefining UU faith formation

programs. In this discussion, I explore how the expected and emergent ideas from this research

overlapped, and I identify how the overlaps lead to the new Conclusive Faith Formation

categories. I also discuss each new Conclusive Faith Formation category's alignment with

research findings from literature highlighted in Chapter II and relevant theories as well as how

the new category aligns with Sweeney's (2018) three original paradigm shift suggestions for

redefining UU faith formation programs.

Answering the First Research Sub-Question: Striving Toward Meaningful Faith Formation

The first sub-question focused specifically on what gaps the parents are experiencing

between their expectations and the reality of the UU RE program they were involved with. The

participants in this study were all busy parents who shared strong opinions relative to their age

and stage in life. As expected, the participants shared their thoughts of the RE programs in the

Baja 4 from their specific generational perspectives (subtheme 3.1). Gen X parents recognized

the value of faith formation but confirmed that they did not want to participate in faith formation

programming as a volunteer due to the overwhelming responsibilities of modern parenting,

which confirms Putnam (2000) research. Aligned with the work of Raines and Arnsparger (2010)

and Landrum (2016), Millennial parents in this study confirmed their need for balance, meaning,

and freedom. A gap that was noticed by most participants involved the perceived

misunderstanding of them and their needs by the congregational leadership in older generations.

Participants expressed appreciation for heartfelt attempts at inclusion of their families, including designated spaces during worship and intentional processes in place for conflict resolution; however, the feasibility of the inclusion attempts were often unrealistic. Modern parents have new expectations of church, and they are in favor of full week faith (subtheme 2.1). The participants in this study all acknowledged their role as the primary religious educators, particularly considering the current restrictions for meeting in person due to COVID-19. Some participants, however, did not identify with the term "educator" and preferred a nomenclature more reminiscent of a guide.

Many parents prefer the role as primary religious educator at home throughout the week but added that they recently have felt overwhelmed with their children also engaged in a virtual learning environment for their regular education (subtheme 2.2). An unexpected and common expectation of participants involved feelings of inadequacy about themselves. Participants expressed the need for online resources that are well documented in an accessible format to support their efforts as the primary religious educator (subtheme 3.3). Several unexpected needs were consequences of COVID-19 and could not have been preconceived by the innovator team or confirmed in the literature review since it was conducted prior to the pandemic. Participants expressed the need for relevant, meaningful content in the faith formation offerings and not extraneous time-filling activities (subtheme 4.3). Participants did express an appreciation for online, age-appropriate, synchronous programming. Many participants mentioned their gratitude for the new online preschool program that combined at-home activities and Zoom meetings for the children and an online parent support group (subtheme 4.4). I conclude that UU RE professionals can attempt to fill the gaps between what is expected and what is offered by honoring generational perspectives, building trust among modern families and congregational

leaders from older generations, and attending to the relevant, real-time issues of modern families. I recognized the relationship of all the subthemes from the interview data listed in this section as contributing to the answer for sub-question #1. I created Conclusive Faith Formation Category #1 for ease in discussing how those subthemes align with research findings from literature highlighted in Chapter II and one of Sweeney's (2018) three original paradigm shift suggestions for redefining UU faith formation programs.

Conclusive Faith Formation Category #1: Relevant and Meaningful Mission.

This category includes the expected subthemes (3.1) Millennial perspective of intentional information and values to support primary religious educator (PRE), (2.1) modern parents have new expectations of church and they are in favor of full week faith, and (2.2) parent as the PRE at home feels overwhelmed in a virtual learning environment. The elements of the first overlap presented in subthemes (3.1), (2.1), and (2.2) confirmed and can expand upon previous research results of the generational cohort theory (Stauss & Howe, 1991), Raines and Arnsparger's (2010) research on generational differences, and the modern parents' perspective and their opinion about civic responsibility and their role as a volunteer (Putnam, 2000). Other research findings from the literature review revealed that faith formation opportunities outside of one hour on Sunday mornings were needed and desired by modern parents (Barna & Kinnaman, 2014; bellavance-grace, 2013; Kadlecek, 2018; Nieuwhof, 2015). This study expanded upon the idea of full week faith because families were forced into a full week faith model and no Sunday school during pandemic times. Nieuwhof (2015) and Barna & Kinnaman (2014) also contributed to research on Millennials and their decline in participation in church. This study expanded upon that idea again because church attendance was difficult to track due to no live services during pandemic times. The Conclusive Faith Formation Category #1: Relevant and Meaningful

Mission corresponds with Sweeney's (2018) paradigm shift #1, perfectionism to process, and my

own goal words for the new RE faith formation pilot program, impactful and meaningful. In

Table 5.1 below, results of this study that answer sub-question #1 (listed as subthemes from the

interview data) are related to relevant theories and pertinent points highlighted in Chapter II. The

researchers associated with the relevant theories and findings in Chapter II are identified, and

Sweeney's (2018) related paradigm shifts and the corresponding Conclusive Faith Formation

Category.

Table 5.1

Comparing Findings from This Research and the Larger Body of Literature That Answered Sub-

Question #1

Research Sub-Question	Expected and Emergent Themes in This Research That Answered the Corresponding Sub-Question	Relevant Theories and Research Findings from Literature	Sweeney's Corresponding Paradigm Shift # and My Goal Words	Corresponding Conclusive Faith Formation Category #
Research Sub-Question #1: What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents'/caregivers' needs, desires, and expectations of these offerings?	Subtheme 3.1 Millennial perspective of intentional information and values to support PRE	*Confirmed* Generational Cohort Theory (Strauss and Howe, 1991); Modern parent perspectives (Raines and Arnsparger, 2010); and opinion about civic responsibility and their role as a volunteer (Putnam, 2000)	#1 perfectionism to process; impactful and meaningful	#1 Relevant and Meaningful Mission
	Subtheme 2.1 Modern parents have new expectations of church and they are in favor of full week faith	*Expanded upon (CR)* Faith Formation opportunities outside of one hour on Sunday morning is needed and desired (Nieuwhof, 2015; Barna & Kinnaman, 2014; Kadlecek, 2018; bellavance-grace, 2013)		

Research Sub-Question	Expected and Emergent Themes in This Research That Answered the Corresponding Sub-Question	Relevant Theories and Research Findings from Literature	Sweeney's Corresponding Paradigm Shift # and My Goal Words	Corresponding Conclusive Faith Formation Category #
	Subtheme 2.2 Parent as the PRE at home feels overwhelmed in a virtual learning environment	*Expanded upon (CR)* Millennials' attendance and participation at church has declined (Nieuwhof, 2015; Barna & Kinnaman, 2014)		
	Subtheme 3.3 PRE needs online resources that are well documented in an accessible format	Not Confirmed		
	Subtheme 4.3 Meaningful content is relevant to the times, not extraneous and unrelated	Not Confirmed/CR		
	Subtheme 4.4 Online faith formation programming that is impactful and accessible, like Parents of Preschool Students (POPS)	Not Confirmed/CR		

Note. The abbreviation "CR" in this table refers to a subtheme that was a consequence of COVID-19 and could not have been confirmed in the literature review since it was conducted prior to the pandemic.

As seen in Table 5.1, some of the findings from the interview data were in alignment with and expanded upon the relevant theories and literature found in Chapter II. There were themes that emerged from the interview data that were not supported by the literature. These were

subthemes (3.3) PRE needs online resources that are well documented in an accessible format, (4.3) meaningful content is relevant to the times, not extraneous and unrelated, and (4.4) online faith formation programming that is impactful and accessible, like Parents of Preschool Students (POPS). All of those themes were COVID-19 related. I will discuss these emergent themes in detail in the "Practical Contributions to UU Faith Formation" section.

Answering the Second Research Sub-Question: Striving Toward Attainable Faith Formation

The second sub-question focused specifically on what multigenerational and UU parenting faith formation opportunities were offered in the Baja 4. As expected, participants expressed a desire for support throughout the week through attainable multigenerational engagement opportunities (subtheme 1.1). In some cases, those opportunities were already in place, but more were desired. Several participants also expressed frustration with themselves and their own lack of understanding the UU faith. The parents' described how they felt unprepared and inadequate to deliver age-appropriate and relevant spiritual development to their children. Increased adult education opportunities related to history and foundations of UU were desired (subtheme 4.1). Another need that was repeatedly emphasized was related to multigenerational worship was an intense desire for community support and opportunities to build and strengthen relationships across generations (subtheme 3.2). An unexpected need was the concern for the multiple levels of grief experienced over the past year. The grief related to missing the supportive, healthy community of the church (subtheme 1.4), related to the struggles of parenting during a pandemic when so many of us are isolated (subtheme 1.2), and related to resistance to changing expectations of family life to accommodate for restrictions of COVID-19 (subtheme 2.5). I conclude that UU RE professionals can attempt to encourage healthy relationships within the community by offering a variety of multigenerational engagement opportunities both live and

in a virtual format. I recognized the relationship of all the subthemes from the interview data listed in this section as contributing to the answer for sub-question #2. I created Conclusive Faith Formation Category #2 for ease in discussing how those subthemes align with research findings from literature highlighted in Chapter II and one of Sweeney's (2018) three original paradigm shift suggestions for redefining UU faith formation programs.

Conclusive Faith Formation Category #2: Guided and Attainable Vision.

This category includes the expected subthemes (1.1) multigenerational engagement opportunities (worship and RE), (4.1) PRE desires ongoing adult faith formation opportunities, and (3.2) PRE desires ongoing support as UU parent, does not want to be alone. The elements of the second overlap presented in subthemes (1.1), (4.1), and (3.2) confirmed previous research results of the multigenerational opportunities embedded in the curriculum foster a sense of community and support (bellavance-grace, 2013; Kadlecek, 2018), UU parents need adult educational opportunities to develop their own spiritual identity and learn about UU foundational aspects (bellavance-grace, 2013; Higgins, 2008; Kadlecek, 2018; Sweeney, 2017), and UU parents need guidance and support to be empowered and encouraged to step into the role of primary religious educator for their children (bellavance-grace, 2013; Kadlecek, 2018; Klink, 1972; Sweeney, 2017). When thinking back to in-person services, several participants offered that they liked it when their children left the service to participate in age-segregated, meaningful faith formation opportunity, which allowed them to gain support from other adults during worship. This was contradictory to Sweeney's (2018) argument that many modern parents (in New England) preferred to remain with their families in the worship service. Conclusive Faith Formation Category #2: Guided and Attainable Vision corresponds with Sweeney's paradigm shift #2, competition to community, and my own goal words for the new RE faith formation pilot

program, interconnected and attainable. In Table 5.2 below, results of this study that answer sub-

question #2 (listed as subthemes from the interview data) are related to relevant theories and

pertinent points highlighted in Chapter II. The researchers associated with the relevant theories

and findings in Chapter II are identified. Table 5.2 also connects Sweeney's (2018) related

paradigm shift and the corresponding Conclusive Faith Formation Category.

Table 5.2

Comparing Findings from This Research and the Larger Body of Literature That Answered Sub-

Question #2

Research Sub-Question	Expected and Emergent Themes in This Research That Answered the Corresponding Sub-Question	Relevant Theories and Research Findings from Literature	Sweeney's Corresponding Paradigm Shift # and My Goal Words	Corresponding Conclusive Faith Formation Category #
Research Sub-Question #2: What multigenerational and UU parenting faith formation opportunities are offered in RE programs?	Subtheme 1.1 Multigeneration al engagement opportunities	*Confirmed* Multigenerational opportunities embedded in the curriculum foster a sense of community and support (bellavance-grace, 2013; Kadlecek, 2018)	#2 competition to community; interconnected and attainable	#2 Guided and Attainable Vision
	Subtheme 4.1 PRE desires ongoing Adult faith formation opportunities	*Confirmed* UU parents need adult educational opportunities to develop their own spiritual identity and learn about UU foundational aspects (bellavance-grace, 2013; Kadlecek, 2018; Sweeney, 2017; Higgins, 2008)		
	Subtheme 3.2 PRE desires ongoing support as UU parent, does not want to be alone	*Confirmed* UU parents need guidance and support to be empowered and encouraged to step into the role of primary religious educator for their children (bellavance-grace, 2013; Kadlecek, 2018; Sweeney, 2017; Klink, 1972)		

Research Sub-Question	Expected and Emergent Themes in This Research That Answered the Corresponding Sub-Question	Relevant Theories and Research Findings from Literature	Sweeney's Corresponding Paradigm Shift # and My Goal Words	Corresponding Conclusive Faith Formation Category #
	Subtheme 1.4 Grief, missing the supportive, healthy community of church	Not Confirmed/CR		
	Subtheme 1.2 UU parents with common values, ages, and stages in life	Not Confirmed/CR		
	Subtheme 2.5 Competition for time is now minutes on a computer and not as much extracurricular commitments in the busy life of modern parents and kids	Not Confirmed/CR		

Note. The abbreviation "CR" in this table refers to a subtheme that was a consequence of COVID-19 and could not have been confirmed in the literature review since it was conducted prior to the pandemic.

As seen in Table 5.2, the findings from the analysis of the interview data were in alignment with the relevant theories and literature found in Chapter II. There were themes that emerged from the interview data that were not supported by the literature. These were subthemes (1.4) grief, missing the supportive, healthy community of church, (1.2) UU parents with common values, ages, and stages in life, and (2.5) competition for time is now minutes on a computer and not as much extracurricular commitments in the busy life of modern parents and kids. All of

those themes were COVID-19 related. I will discuss these emergent themes in detail in the "Practical Contributions to UU Faith Formation" section.

Answering the Third Research Sub-Question: Striving Toward Sustainable Faith Formation

The third sub-question focused specifically on what adaptive and innovative alternatives RE professionals can offer that will help make RE programs more sustainable. Although contradictory to what was mentioned previously in sub-question 1 (subtheme 4.4) regarding the need for online synchronous programming, participants also expressed appreciation for asynchronous online offerings and parent support groups with alternative times and on demand accessibility (subtheme 2.3). Participants shared how those choices made participation easier. Asynchronous offerings are less stressful for families, support a family ministry model, and are sustainable for future programming. The participants in this study all expressed interest in alternative engagement opportunities to the traditional Sunday school format (subtheme 4.2). This theme was expected but for a different reason than what ended up being true. The innovator team originally expected participants to express the need for alternate engagement opportunities because previous research has shown that the Sunday school–only model created unhealthy expectations for families (bellavance-grace, 2013, Joiner, 2009; Kadlecek, 2018; Sweeney, 2017). However, alternate formats for *online, time-sensitive, Zoom meetings* were mentioned often by participants. They reported that their kids are unmotivated and tired of screens and Zoom, they are "Zoomed out." An unexpected theme concerned the way in which families are welcomed into the congregation. Participants shared the deep desire to engage with a spiritual community at the onset of parenthood (subtheme 2.4). However, when visiting UU congregations in the Baja 4, overzealous welcoming efforts were sometimes perceived as a turnoff. Participants expressed the importance of congregational preparedness for welcoming

new families (subtheme 1.3), even in a retirement community. I conclude that UU RE

professionals can create sustainable programming if they listen to the needs of their families and

respond by recalibrating their expectations and making appropriate changes to their faith

formation programs. I recognized the relationship of all the subthemes from the interview data

listed in this section as contributing to the answer for sub-question #3. I created Conclusive Faith

Formation Category #3 for ease in discussing how those subthemes align with research findings

from literature highlighted in Chapter II and one of Sweeney's (2018) three original paradigm

shift suggestions for redefining UU faith formation programs.

Conclusive Faith Formation Category #3: Cultivated, Sustainable, and Perpetuating

Method.

This category includes the expected subthemes (2.3) asynchronous online offerings with

alternative times and on demand accessibility are sustainable and less stressful for families and

(4.2) alternative format for delivery: kids are unmotivated and tired of screens and Zoom,

"Zoomed out." The elements of the third overlap presented in subthemes 2.3 and 4.2 expanded

upon previous research results. Conclusive Faith Formation Category #3: Cultivated and

Perpetuating Method corresponds with Sweeney's (2018) paradigm shift #3, martyrdom to

maintenance, and my own goal words for the new RE faith formation pilot program, innovative

and sustainable. In Table 5.3 below, results of this study that answer sub-question #3 (listed as

subthemes from the interview data) are related to relevant theories and pertinent points

highlighted in Chapter II. The researchers associated with the relevant theories and findings in

Chapter II are identified. Table 5.3 also connects Sweeney's (2018) related paradigm shift and

the corresponding Conclusive Faith Formation Category.

Table 5.3

Findings from This Research Compared to Relevant Theories and Research Findings from the

Larger Body of Literature That Answered Sub-Question #3

Research Sub-Question	Expected and Emergent Themes in This Research That Answered the Corresponding Sub-Question	Relevant Theories and Research Findings from Literature	Sweeney's Corresponding Paradigm Shift # and My Goal Words	Corresponding Conclusive Faith Formation Category #
Research Sub-Question #3: What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their articulated needs, desires, and expectations that will help make RE programs more sustainable?	Subtheme 2.3 Asynchronous online offerings with alternative times and on demand accessibility are sustainable and less stressful for families	Expands upon asynchronous online offerings with alternative times and on demand help empower parents and lift up the Family ministry model (Joiner, 2009; Kadlecek, 2018; Sweeney, 2017)	#3 martyrdom to maintenance; innovative and sustainable.	#3 Cultivated and Sustainable, Perpetuating Method
	Subtheme 4.2 Alternative format for delivery of content: Kids are unmotivated and tired of screens and Zoom	Expands upon alternative format for delivery of content: Kids are unmotivated and tired of screens (Sweeney, 2018)		
	Subtheme 2.4 Onset of parenthood inspired desire to engage with a spiritual community	Not Confirmed		
	Subtheme 1.3 Welcoming families and acceptance	Not Confirmed		

As seen in Table 5.3, the findings from the interview data expanded upon the relevant

theories and literature found in Chapter II. There were themes that emerged from the interview

data that were not supported by the literature. These were subthemes (2.4) onset of parenthood inspired desire to engage with a spiritual community and (1.3) welcoming families and acceptance. Neither of those themes were COVID-19 related. I will discuss these emergent themes in detail in the "Practical Contributions to UU Faith Formation" section. I conclude that UU RE professionals can more effectively engage families in faith formation opportunities by empowering parents and providing guidance to them as the primary religious educators for their families through family ministry focused programs.

Practical Contributions to UU Faith Formation

This research was important to conduct because there is a widening gap between what is offered in UU RE programs and understanding parents' expectations of the UU RE program. I set out to redefine what engagement means in religious education in the UU church, then find solutions to current concerns that are meaningful, attainable, and sustainable for today's parents to incorporate spiritual development opportunities into their children's lives in the UU religious education programs. This research was also important to me as a researcher and to my team of innovators that participated in the action research. This research uniquely contributed to our understanding of the generational perspective gap. The results of this dissertation study highlighted firsthand knowledge of what modern parents needed in a new, innovative RE program within the context of four congregations in Southern Arizona. This study contributed to innovative UU religious professionals' efforts to change the paradigm of UU faith formation. The qualitative data that were collected and analyzed affirmed what many religious educators have been talking about with their RE committees, district leadership, and continental religious professionals for the past decade.

Alas, so many congregations continue to employ religious educators primarily to focus on providing content on Sunday mornings. During the focus group, Schlobohm, a member of the innovator team, commented,

> Somebody's going to have to get it through to the powers that be, whoever they are, in whatever congregation, that maybe we need to be okay changing the paradigm, and maybe we need to give our religious educators support in making that happen … this study, to me, is very powerful in that it's basically like this big flag that's being waved, this is what we've been talking about, parents are grieving, are you going to [support us]?

Based on the emergent themes in the findings from the interviews, I combined several subthemes and derived the following three conclusive and essential elements that point toward steps for a Family Ministry RE model that can provide faith formation opportunities throughout the week.

1. Become a welcoming congregation for families. UU RE professionals can fill the gaps between what is expected from modern parents and what is offered in their faith formation programming by honoring generational perspectives, building trust among modern families and congregational leaders from older generations, and attending to the meaningful and relevant, real-time issues of modern families.

2. Prioritize relationships and community. UU RE professionals can encourage healthy relationships within the community by offering a variety of multigenerational, attainable engagement opportunities both live and in a virtual format.

3. Recalibrate programming expectations and provide resources for parents as the primary religious educators. UU RE professionals can create sustainable programming by listening to the needs of their families and respond by providing online resources that are well documented in an accessible format.

Based on my experience as a UU religious professional, exploration of relevant literature, and findings of this study, I recommend that parents as primary guide for faith formation, innovative UU religious professionals, and congregational leaders who care about the sustainability of their churches across the continent take heed of the three significant elements that emerged from this research and incorporate them into a paradigm shift in their faith formation programs. In my opinion, the best way to do that is by refocusing on family ministry and empowering the parent as the primary guide for their children's spiritual development. bellavance-grace (2013) modelled how to build family ministry by making opportunities attainable for families throughout the week. Kadlecek (2018) modelled how to build family ministry by redefining the roles of faith formation leadership in the congregation in the Binghamton experiment. Her ideas ensured the sustainability of a new program. Joiner (2009) modelled how to build family ministry by encouraging cooperation between families and church in the Think Orange approach. The findings of all three phases of this study extended the inspiring ideas of bellavance-grace, Kadlecek, and Joiner and informed the Faith Formation Model. In Phase I, the perspectives of the participants as expressed in their interviews informed the creation of the new RE engagement pilot program in Phase II. The new RE engagement pilot program included faith formation opportunities that were attainable and sustainable. The innovator team gave particular attention to including faith formation opportunities in pilot program that were independent of other lessons and very accessible. The format of the pilot program provided a structure in which the lessons were divided into key learning areas. Some learning areas were further divided into sections for the kids and for the grownups. The ease of accessing and maintaining the pilot program online encouraged me to strive for a similar format in the creation of the conceptual Lotus Faith Formation Model. The conceptual Lotus Faith Formation Model includes both synchronous and

asynchronous faith formation opportunities that could be adapted for a live or virtual format. There are age-appropriate content and multigenerational learning opportunities. The 12 engagement opportunities are clearly divided between "for the kids," for the grown-ups," and "for the congregation." They are also divided in four groups inspired by the themes that emerged from the interview data in the study: community, response to change, resources, and content. I named this model the Lotus Faith Formation Model for several reasons. A lotus flower is a beautiful 12 petaled blossom that emerges from a murky, muddy pond. The stem and leaves support and nourish from underwater while the bud and a few leaves seemingly independently float on top of the water. That imagery is synonymous with the experience of creating a meaningful, attainable, and sustainable new faith formation model during these redefining pandemic times of frustration, uncertainty, and forced ingenuity.

The new model was created from the murky, muddy confusion of the unexpected and frustrating changes of life during COVID-19 restrictions. The family ministry format provides guidance while a sustaining, supportive community nourishes and empowers the parent as the primary religious educator. What has emerged and blossomed is 12 faith formation constructs that have potential for community-building multigenerational engagement, meaningful content, attainable synchronous and asynchronous interactions, and sustainability for future programming. I envision this model would best be disseminated in an app format, which would allow internet links within each section. A visual representation of the conceptual Lotus Faith Formation Model is shown in Figure 5.1. Following Figure 5.1 is a detailed matrix for referencing the elements of the conceptual Lotus Faith Formation Model in Table 5.4.

Figure 5.1

Conceptual Lotus Faith Formation Model Figure

Virtual hub of resources

Online options but provide materials needed for activities

Relevant and meaningful conversations

In the moment virtual hub of resources

Intentional leadership development

Grief and Resistance to Change Education

Asynchronous and Synchronous, live and virtual, throughout the week

UU parenting support group.

Welcoming Families build trust. Focus on Family Ministry

UU parenting and Faith Development classes

Multigenerational opportunities in RE and Worship

Intentional opportunities to be with others their own age

Leaves provide support, guidance, and nourishment and represent the Family Ministry Model which empowers the parent/guardian as the primary religious educator.

Murky and muddy pond represents confusion and times of uncertainty due to societal changes (COVID-19) and generational perspectives.
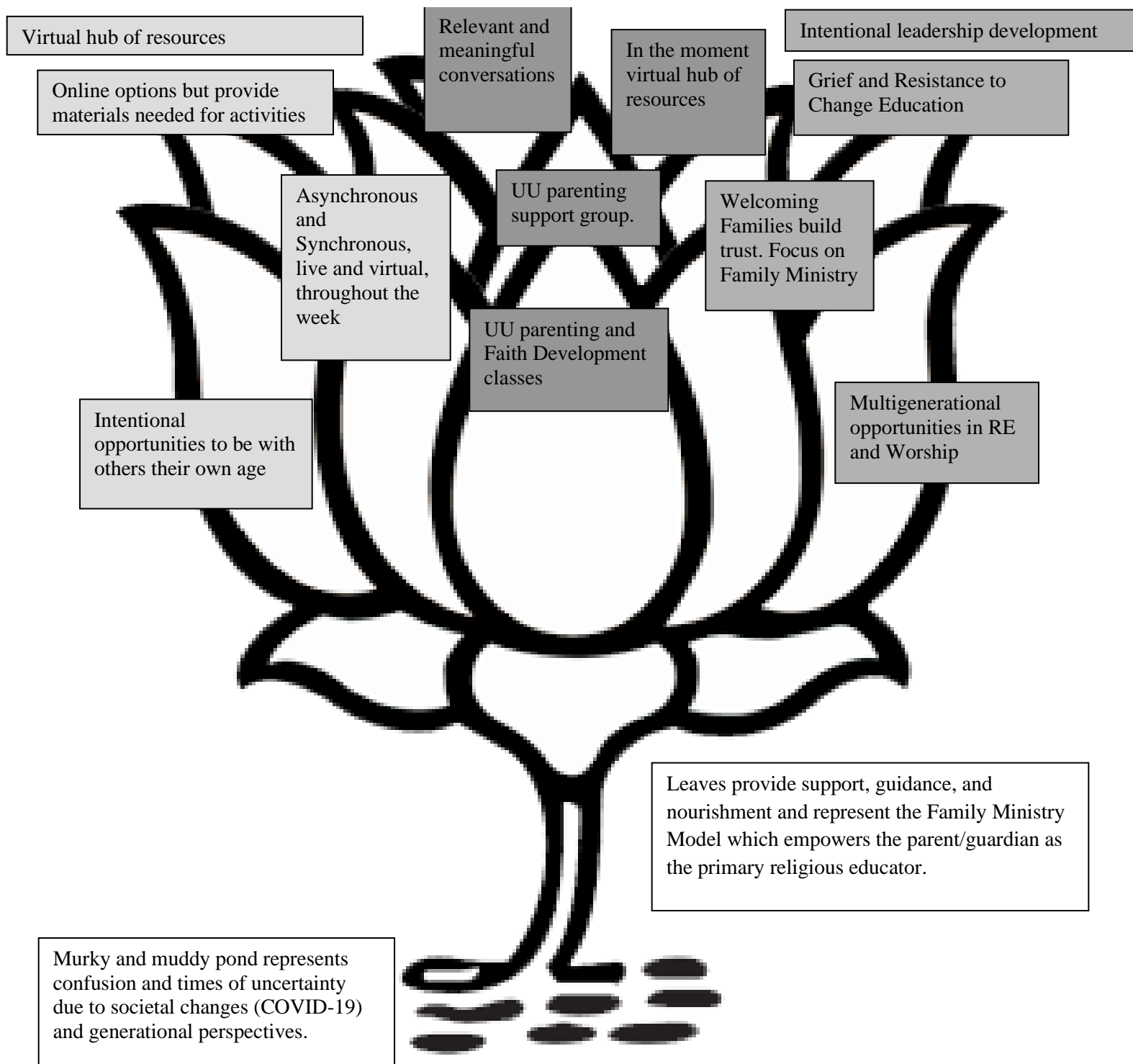
Table 5.4

Conceptual Lotus Faith Formation Model Table

Elements of the Cultivated and Perpetuating Method	For the Kids	For the Grown ups	For the Congregation
Content	Asynchronous and Synchronous, live and virtual, throughout the week.	UU parenting and Faith Development classes	Welcoming Families build trust. Focus on Family Ministry
Community	Intentional opportunities to be with others their own age. Tapestry of Faith does well with this	UU parenting support group. UUCT has one in place on Facebook	Multigenerational opportunities in RE and Worship
Response to Change	Online options but provide materials needed for activities	Modern parents' needs, desires, and expectations supported with ongoing conversations that are relevant and meaningful	Grief education. Resistance to Change education.
Resources	Virtual hub for kids with age-appropriate language and opportunities to ask questions about UU	Virtual hub of resources to provide in the moment support for UU parents	Intentional leadership development including Adaptive, Collaborative, and Transformational Leadership Theories

The meaning I made of the data from this study is evident in the conceptual Lotus Faith

Formation Model. The thematic analysis of the interviews revealed significant needs, desires,

and expectations of UU parents/caregivers. Synthesis of that data assisted the innovator team and

me in the creation of the pilot program. Participation in the pilot program for the three-week

launch period and further reflection by the participants of their preferences gave way to rich

conversation in the focus group. In my opinion, the discussion of this action research project

showed how I created and tested a meaningful, attainable, and sustainable pilot program for the

Baja 4 UU RE program that culminated in the conceptual Lotus Faith Formation Model (Figure

5.1) as the ultimate contribution of this research.

Implications of Leadership and Change

Two vital leadership theories that I focused on in Chapter II, adaptive leadership by Heifetz et al. (2009) and collaborative leadership by Chrislip and Larson (1994) informed this research. Using the strategies from the theoretical frameworks of adaptive and collaborative leadership could be advantageous to the process of rethinking and reformulating religious education programming, which would lead to shifting the paradigm. Participants referred to both personal and community situations that could benefit from implementing strategies congruent with the guidelines in both leadership theories.

The elements of adaptive leadership theory were confirmed by some participants in their comments about inclusion. They noticed the religious professionals in the Baja 4 were cognizant of their needs regarding accommodations for ability, age, and learning preferences. In my opinion that shows the use of adaptive leadership within the Baja 4 because the congregational leaders were able to get off the dance floor and get a new perspective of their congregants' needs from the balcony (Heifetz et al., 2009; Heifetz & Laurie, 2001). Several participants expressed desire for community support and movement away from individualism. They are holding a vision for what UUs are working toward as a whole, taking on a. m. brown's (2017) the new social covenant "I to We" consciousness. UU congregational leaders need to challenge and transform past approaches to problem solving and give less attention to planning structured programs. The conceptual Lotus Faith Formation Model (Figure 5.1) that is presented in this study could assist them in that task.

Collaborative leadership theory advocates for that "we" consciousness by honoring relationships and building trust in the community. Fostering an environment of trust will signal the importance of the Millennial and Gen X perspective and build strong communities. In turn,

with trust as a keystone in the community, congregations will be empowered to build meaningful, attainable, and sustainable faith formation programs. A. m. brown (2017) delineated several core principles of her ideas about emergent strategies for a better world. One of those core principles is to "move at the speed of trust. Focus on critical connections more than critical mass—build the resilience by building relationships" (p. 42). Trust is the keystone to building strong communities. Community was mentioned most frequently by participants in this study. In order for a congregation to successfully embrace change, they need to focus on welcoming families and gain inherent trust from modern parents who value trustworthy organizations.

The participants emphasized their expectations of "I to We" consciousness especially when referring to how COVID-19 has impacted their personal and professional lives. Pandemic restrictions such as months of mandatory quarantine, moving most work and education environments online, additional responsibilities for children related to school, and grief-related stress regarding missing live connection with or losing loved ones. The enormous task of rethinking religious education is the work of the entire congregational community. It is not only the work of the minister and religious educators. This study encourages and guides religious professionals to adapt and collaborate in the spirit of shared ministry to find answers and solutions to the struggles in the development and delivery of their own faith formation programs.

COVID-19 impacted this research in the way I thought about community. Prior to COVID-19, I would have defined a congregational community using geographical boundaries and membership records of the church. Those boundaries were expanded and transcended when I launched the pilot program on the UUCT RE website. The congregational community expanded through the world wide web, where anyone could access, engage, and/or enrich the pilot program. Participants and contributors in the pilot program extended across the United States.

There were specific opportunities for the Baja 4 congregations, but most could be adapted to any congregation's RE program. Prior to COVID-19, I would have planned more live engagement opportunities with specific meeting times. Pandemic restrictions challenged my expectations and forced me to innovatively create a program that was accessible and engaging for families without requiring their physical presence in a synchronous learning environment.

Thinking back about the process of this research, how it unfolded, and what changes occurred, it reminded me of transformational leadership theory (Burns, 1978). I did not explore transformational leadership theory in Chapter II, but, in my opinion, it has a place in this work. Burns defines transformational leadership as follows,

> One or more persons *engage* with others in such a way that leaders and followers raise one another to higher levels of motivation and morality … power bases are linked not as counterweights but as mutual support for common purpose … it raises the level of human conduct and ethical aspiration of both leader and led, and thus it has a transforming effect on both. (p. 20)

In my opinion, Burns's (1978) transformational leadership is an appropriate leadership model for innovative religious professionals who are striving to shift the paradigm and develop sustainable programming for their congregations because:

- religious professionals engage and empower parents as the primary guide in faith formation for their families,

- the congregational community is linked as a mutual support for the common purpose of faith formation,

- leader and led are equally transformed through the relationship in trust which fosters a congruent and cooperative responsibility for faith formation.

Ms. Omar is an innovative religious educator. During the focus group she summarized her experience with this research study and proposed a question for moving forward. Ms. Omar said,

> I am very deeply grateful that you're doing the interviewing and the work and the way that it's affirming what we kind of know just from our conversations with the people we serve, that it's a good reminder of the power of just listening to them, right? When I talk to them and listen to them and hear what they need or hear what they're saying. And it goes against kind of what we think of as conventional wisdom, that's actually what's real now rather than what somebody said all this long time ago … if we have three to six to 12 months before we're back in person again how we can take and really enjoy us this morning … You know there's the [ministerial and congregational leadership] support there at UUCT and then this collaboration with the Baja 4 is really exciting too, and so, how do we take this learning then and implement it? I think that's the big question because we've got some time now to plan for it.

I recommend that innovative religious educators who are interested in a paradigm shift in UU RE and are interested in research, further explore how transformational leadership theory could inform a change in UU RE.

I also acknowledge that innovative leaders in other educational settings who recognize an emerging paradigm shift due to societal changes or new expectations and rules related to COVID-19 may benefit from this research as well. My three conclusive and essential elements mentioned earlier could provide a broader appeal to many programs and educational settings that desire change. Since Millennials and Gen Xers make up most of the workforce, educational organizations would be remiss if they did not attend to the three conclusive elements for their personnel, learners, and families. Particular attention to which entities hold the power in the organizations and how that power affects the others, particularly minorities, would be imperative. An adaptive perspective of the three conclusive elements for educational leaders in organizations outside of Unitarian Universalism may include:

1. Serve as a liaison between established leadership and policy from older generations and modern families. Translate generational perspectives between the two entities and encourage trust. Welcome families by acknowledging and investing in their real time

issues by prioritizing family life programs and services applicable to their cultural priorities and preferences.

2. Recognize the value of mutual community care and support instead of individualizing family experiences. Prioritize healthy relationships within the community by offering a variety of multigenerational and cross-cultural learning opportunities both live and in a virtual format.

3. Evaluate policy for the effectiveness of family life programs and services and determine if they appropriately account for changes in the modern family due to COVID-19, societal expectations, and cultural priorities and preferences. Then, recalibrate expectations and create sustainable programming which provides accessible resources for parents as educational partners.

I recommend that educational leaders who care about the sustainability of their organizations take heed of the three adapted conclusive elements and incorporate them into a paradigm shift in their educational context. In my opinion, the best way to do that is by refocusing on families and their unique needs, then connecting them to the power and support of the greater community.

COVID-19: An External Driver for Change

Recent and diligent efforts by a few religious professionals have produced impactful, interconnected, and innovative pedagogical indications (bellavance-grace, 2013; Berry, 2018; Joiner, 2009; Kadlecek, 2018; Roberto, 2020; Sweeney, 2017). These efforts became even more pertinent in March 2020 when our lives as we knew them, professionally and personally, changed dramatically. The onset of a global pandemic, COVID-19, necessitated a change in planning, procedure, and process in most everything we do. Suddenly, churches closed their doors, virtual venues replaced live religious education and worship, and families quarantined in

their homes. We are now abruptly faced with unforeseen and unprecedented circumstances that require an immediate and operative response to carry on with our lives. The need for change is imminent. Now, more than ever before, religious professionals must adapt their methods for delivering faith formation to their families. Nevertheless, that is no easy task. A spirit of trial and error has quickly and necessarily become the religious educator's method of operation. Omar, the current Director of Religious Education at Unitarian Universalist Congregation of Tucson, jokingly commented, "I feel like my job title has changed to 'Head Spaghetti Thrower'" (personal communication, September 1, 2020). In 2015, Bolsinger referred to the church's changing times, but his words are incredibly applicable to our current predicament.

> We are entering a new day, new terrain, and a new adventure … The next steps are going to be demanding. More than anything, this moment requires those of us in positions of authority (and even most of us who are not) to embrace an adventure-or-die mindset and find the courage and develop the capacity for a new day. We are heading into uncharted territory and are given the charge to lead a mission where the future is nothing like the past. (p. 23)

COVID-19 pandemic restrictions impacted my work as a researcher in three ways. First, working in qualitative research necessitates human interaction. Interviews and focus groups are preferable live so that the researcher can pick up on unspoken cues and reactions. These cues include body language, facial expressions, sensitivity to temperature or noise, awareness of social norms, and transition skills. Due to COVID-19, the interviews and focus group had to take place in a virtual venue, Zoom. Although the unspoken cues and reactions were not completely missing on the Zoom platform, a live interview is superior to a video interview for data collection. Second, the intention of the interview questions was originally to gather data about the current and established RE programming at UUCT. Since COVID-19 restrictions confined everyone to their homes and closed church doors, UUCT coordinated all online RE efforts with the Baja 4 and had to create an entirely new program online. So, when answering the interview

questions, the participants had to make the distinction between pre-COVID-19 RE and current RE. This proved to be confusing and challenging for some and did complicate their answers. Third, communication was limited to electronic forms only. Participants and key stakeholders received invitations, updates, and reminders as emails, texts, and newsletter notices. All interviews and meetings were hosted on the virtual platform, Zoom. If an individual was away from their device, there was no other way to reach them. In the past, verbal announcements during Sunday service or informally in passing would have occurred. Paper flyers or notes certainly also could have been distributed. As a teacher, I learned to always remind people about events three times in three different ways. That was simply not an option due to COVID-19.

When the format for religious education was forced to change with the restrictions placed upon us around the global pandemic, Roberto (2020) responded and adapted his Lifelong Faith and Faith Formation for the 21st Century models to reflect possibilities for religious education in a virtual format in his *Guide to Transforming Faith Formation for a New World*.

Recommendations for Future Research

Based on the research design and findings in this research study, I recognize that further research is needed to determine the effects the global pandemic COVID-19 has had on families. While this qualitative research was necessary and informative, it produced data from only one congregational cluster. I would like to recommend further research with a quantitative focus using survey on a larger scale. I recommend particularly focusing on the overarching grief that accompanied so many parents in their daily lives during times of quarantine. Grief was due to loss of normalcy and loved ones due to COVID-19, loss of socializing with friends due to quarantine and online education, and/or loss of democratic process due to political upheaval and racial injustice. I would also like to recommend further research on how COVID-19 disrupted

congregational life and thus religious education. With the changes related to COVID-19, new questions were generated for the future of faith formation. What will faith formation look like post-pandemic? How can religious professionals best serve families in a live, virtual, or blended format? What have we learned from our time separated that contributes to more sustainable faith formation programs? How do we recalibrate our expectations of faith formation programs and how we engage? John Roberto has started asking similar questions on his Lifelong Faith website. As we slowly begin to enter back into society, I would like to recommend a participatory action research study in which congregational leaders and religious professionals could collaborate and address some of the questions noted above. The consequences of the COVID-19 impact on families and religious education programs are yet to be determined because we are currently living in pandemic times. When congregations are able to return to their buildings and religious education programming is live again, it may look similar to pre-pandemic and folks may perceive life as getting back to normal. However, post-pandemic life will come with the experiences and memories of life during a disruptive pandemic. Life certainly cannot be back to normal. We will have a new normal. I affirm that both quantitative large-scale studies and congregationally focused participatory action research studies will produce valuable data that could continue to support modern parents in their quest as primary religious educators for their families.

Reflection on Study Limitations

There were four limitations delineated in Chapter I of this dissertation: transferability, interview questions, participant criterion, and COVID-19. In this section I will reflect on those four limitations and add a fifth.

The findings of this study are not considered transferable since I used an action research methodology, and they are based on participants' from a specific case study context. The data gathered from the interviews about the participants need, desires, and expectations in the specific case study context greatly helped the innovator team to design a specific RE engagement pilot program for the case study location. The outcome goal of this project was to redefine engagement in the Baja 4 RE program specifically, so the specific innovative ideas and the findings apply to the specific research site.

Efforts to avoid misleading interview questions were made with the innovator team by discussing and reflecting on questions for several weeks before finalizing the format. The findings were reported with accuracy and considered any participant answers that may have resulted from a misunderstanding.

Imposing a strict criterion for participation in this study prevents me from collecting needs, desires, and expectations about the RE program of parents in the Baja 4 outside of the selected group.

Attempting to propose an innovative new RE engagement plan for the Baja 4 RE program during a time of uncertainty and frequent change (COVID-19) posed a limitation to this study. Some considerations were offering both asynchronous and synchronous faith formation opportunities in a virtual setting, social distancing during live activities, and providing relative meaningful content to help families with feeling of grief.

In retrospect, I would like to add an additional limitation related to the method of action research. Some of the innovator team's knowledge of thematic data analysis and availability to commit time to the research was limited. I will elaborate on that limitation in the next section.

My Reflection on the Action Research Process

Using the methodology of action research provided unique opportunities for learning that were both beneficial and frustrating. Action research requires the researcher to use both collaborative and adaptive leadership styles. I enjoy being in relationship with others, and I thrive in an environment where each team member shows up with their skills and contributes to a common project for the greater good of all involved. I trust others easily and often hold high expectations for those who choose to participate in group work with me. Adaptive leadership can be challenging and require great ingenuity and courage to face adversity or problems with new eyes. Being willing to take chances and possibly fail is normal. Allowing oneself (and thus one's group) to be vulnerable and open with the learning is essential.

The action research framework provided the real-time knowing about the Baja 4 modern parents' needs, desires, and expectations for spiritual development in their families. I appreciated the willingness of the participants to share their thoughts in the interviews and engage with the pilot program. I also appreciated the collaboration with the Baja 4 religious professionals and their openness to try new approaches. Utilizing key informants in the curriculum incubator process was extremely positive and helpful. All key informants contributed useful ideas and followed through with development assistance in the creating on the pilot program. The key informants also provided helpful reflective insights for the focus group at the end of the study. Using an innovator team to assist with development of the research design was also beneficial. As an important element of action research, their professional insight proved to be a boon in all phases of the study.

However, I acknowledge that some of the innovator team's knowledge of thematic data analysis and availability to commit time to the research was limited. Participation in the coding

process, curriculum incubator day, interaction with the pilot program, and contribution to the focus group were not optimal and may have affected the quality of the analysis, pilot program, and reflection process in action research.

I leave my work with the Baja 4 with gratitude for the value of action research in a congregational setting during a change effort. As any effective action researcher would do, while engaging in this reflection process after the study, I formulated several key learnings that in some regards are personal; however, they may be useful for others attempting an action research project, and therefore, I believe, are worthy of sharing.

1. Personal bias affects outcome. In my own experience with UU RE I was often in the position of convincing congregational leaders that RE was changing and they needed to take heed of the trends or their congregation may be left behind. I had a bias that most congregations had similar uncooperative leadership, comprised of middle-to-upper class white people in the Baby Boomer or Traditionalist generations who did not trust me and were unwilling to change their ways. My bias caused me to see my research to prove to those resistant congregational leaders that I was right. Through this research with the Baja 4, my bias was shattered. The congregational leadership and religious professionals involved with this research were positive, responsive, and eager to learn about the trends in UU RE and how they could change to best serve their families.

2. Look out for unexpected lessons. I was sure my data would confirm all my inclinations about how RE needs to change. I never doubted that my preconceived ideas about multigenerational worship, faith formation throughout the week, and generational perspectives would be confirmed. I was surprised when team members found other themes in the interview transcripts that brought out additional parent concerns that I had

not considered. Most participants expressed feelings of inadequacy and did not see their own role in contributing to the adaptive solution of redefining engagement in UU RE. I learned that the PhD journey is not about the degree that is earned at the end, but instead about the lessons along the way. One emphatic lesson was when I realized that my work had potential for application outside of religious education in the UU church. I see how I can contribute to a larger educational setting as a leader in innovative, programmatic change. I have also gained knowledge about the modern parents' needs and have a greater understanding of how to support them on their parenting journey.

3. Allowing time for reflection is essential. I have noticed that I am able to listen and respond to others with more grace. My approach to problem solving is much slower, reflective, mature, and considerate. I appreciate this shift in my own processing and feel it will help me to professionally explain to others how to effectively work as a leader to encourage positive change.

Conclusion

As stated in Chapter II, I felt charged with a task of addressing the gaps in religious education in the UU church, particularly during this time of COVID-19. This study provided insight through a case study that could lead toward further research about redefining engagement in other congregations. This study has allowed me to provide important exploratory research to the field of UU religious education. To reiterate the hopes I stated in Chapter II, specifically, the work done in this research

- revealed the changed environment of RE in the UU church and aimed to shift to a process that remains unclear but is hopeful for an attempt at impactful and meaningful change in UU RE,

- encouraged an attitude of transformation toward community involvement for both leaders and followers in the context of UU RE,

- lead to innovative solutions that engaged followers in conversations about future possibilities for more sustainable RE programming and about the losses that were incurred.

At the commencement of this study, I had many unanswered questions. My most burning question was how to redefine engagement for UU faith formation. My deepest desire was to listen to parents and implement their ideas in the process of redefining. I feel I was successful, and I look forward to guiding other congregations in their quest for redefining faith formation in their own community. In closing, I endeavor into a changed macrocosm of the world with new expectations and rules. I also dive deeper into a microcosm of UU RE, also with new expectations and rules, and with a renewed sense of accomplishment and hope for the future of the work. I remain an innovative leader for change and proceed with this integrated question: Can you courageously find a place where your community prioritizes trustworthy interactions, acknowledges generational differences, and encompasses group responsibility for a meaningful, attainable, and sustainable faith formation program based in family ministry? If you can, I would be honored to meet you there.

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Appendix

Appendix A: Interview Questions for Phase I

The following questions were developed by the innovator team for the purpose of the interview

which comprises Phase I of the research study for this dissertation.

The questions were created in categories of three themes. The three themes emerged from the

exploratory preliminary study that was facilitated prior to this research study.

The three themes were then translated into the three sub-questions to the main research question.

Although the main research question and sub questions will not be explained outrightly to the

study participants, the interviewer will remain cognizant of them throughout the interview.

The main research question is: **How could UU RE professionals more effectively engage**

families in faith formation opportunities designed to meet the desired outcomes of UU

parents/caregivers?

The table below shows the synthesized matrix for the three themes that emerged from the

exploratory preliminary study, the corresponding paradigm shift, the related sub-question, and

the corresponding interview questions.

Synthesized Matrix		
Corresponding themes that emerged from the exploratory preliminary study	**corresponding paradigm shift in UU RE**	**related sub question**
Acknowledge and fill in the gaps between what is desired and offered in order to support an impactful and meaningful program	#1 perfectionism to process; impactful and meaningful	What are the gaps that exist between what is offered in RE programs and Gen X and Millennial parents/caregivers' needs, desires, and expectations of these offerings?
Interconnected and attainable multigenerational and lifespan opportunities	#2 competition to Community; interconnected and attainable	What Multigenerational and UU parenting faith formation opportunities are offered in RE programs?
Develop sustainable and innovative alternative approaches	#3 martyrdom to maintenance; innovative and sustainable	What adaptive and innovative alternatives can RE professionals offer to parents/caregivers in response to their articulated needs, desires and expectations that will help make RE programs more sustainable?

1. *Intentional parenting involves planning and providing meaningful opportunities for children in which they will learn specific life lessons. Many Millennial and Gen X parents choose to parent intentionally and become involved in a spiritual organization that can support that intention. Do you feel the faith formation opportunities in your congregation support that intention?*

2. *I am interested in what your most impactful and/or meaningful experience was with the RE program in your congregation.*

3. *What would make the RE program you are affiliated with more impactful or meaningful?*

4. *Modern families are busy with many commitments. Many church communities strive to provide opportunities that involve many ages simultaneously and are attainable for families to be involved. Do you feel that the engagement opportunities are in competition for your time with other family commitments? Are the RE engagement opportunities offered in your congregation attainable?*

5. *As far as you know, are there programs in your congregation that are multigenerational? Are they offered annually or cyclically? What would you change?*

6. *Some people say the parent is the best teacher for their children. They offer living examples, share daily tasks, and spend the most time with them (especially now as we are staying home more). How do you feel about taking on the role as primary religious educator for your family? What kind of support would you desire from the Religious Educator in your congregation?*

7. *Compared to RE programming prior to COVID-19, which engagement opportunities seem to be sustainable? Which opportunities would you like to see continue, even if RE returns to in person?*

Appendix B: Correspondence with Participants

Correspondence with Participants

Email #1

Subject: Your participation is requested for a dissertation research study

Good morning,

I have coordinated with Jamili Omar and am pleased to communicate with you today about an exciting opportunity. I am a Unitarian Universalist Religious Educator from Flagstaff, Arizona. I am also currently a PhD candidate at Antioch University in Leadership and Change. My dissertation focus is Religious Education in the UU church. I am required to create a research study based on my interest in redefining engagement and creating changes that are needed and wanted by you, the families.

I have reached out to you today because I hope you will accept this invitation to learn more about my research study and possibly contribute as a participant. To date, no one has formally gathered qualitative data regarding paradigm shifts in RE in the UU church. We will be the first. There are three criteria for the selection of participants.

1. Participant is a member of one of the UU congregations in the Baja 4 conglomerate in Southern Arizona.
2. Participant identifies as a member of the Gen X (born 1965–1980) or Millennial (born 1981–1996) generations.
3. Participant identifies as a parent or guardian of a child (age 0–18) that is involved in faith formation programming at their UU congregation.

If you are interested in participating, please complete this form. I will receive it and be in touch with you directly. I am also happy to answer any questions you may have. You can reach me directly at ███████████████.

We are also looking forward to a Zoom meeting on January 13 at noon Arizona Time. We will discuss any details and answer any questions you may have. Please accept this invitation to attend the Zoom meeting with me and my research team.

Best,

Amy

Zoom meeting

Topic: Dissertation research with UUCT families and other Baja 4 congregations

Time: Jan 10, 2021 12:00 PM Arizona

Join Zoom Meeting

████████████████████████

Email #2

Subject: Participant information for Baja 4 RE research project

Dear [name of potential participant],

I was pleased to review the information that you provided in the Dissertation Participant selection form. You have met all three required criteria for participants, so, I would like to officially invite you to continue as a participant in this research project. Please complete the steps below if you are interested in moving forward as a participant.

1. Read through the consent form and **complete the consent to participate form**. Please be sure to provide your first and last name if you consent to the terms listed in the consent form

(available as a google doc, link provided in consent to participate form). We cannot proceed with your participation until we have a consent to participate form on file. This will only take a couple of minutes.

2. Reply to this email and let me know when you are available for an interview at your earliest convenience. Interviews will be on the Zoom platform and last approximately 90 minutes. Your interview can be scheduled any time between today and January 22, 2021. If you have any questions or concerns, please include them in your reply.

3. If you would prefer to wait to schedule your interview until after the orientation meeting on January 10 at 12:15, that is fine. However, keep in mind that I am happy to provide all information that will be covered in the orientation meeting to you privately at any time. Your attendance at the orientation meeting is not a requirement for your participation.

Thank you for your interest and I look forward to meeting you.

Best,

Email #3

Subject: follow up for interview arrangements

Good morning,

I understand that you are interested in participating in my dissertation research with the Baja 4 UU congregations in Southern Arizona. I would like to set up an interview with you as soon as possible. Are you available this week?

Best,

Amy Huntereece

Email #4

Sent February 25, 2021 from Jamili

Subject: Your participation in the New Engagement Pilot Program

Dear families,

I am pleased to announce the launch of the New Engagement Pilot Program. Please join us in many Faith Formation opportunities for your family for the month of March. See flyer for details.

Best,

Amy Huntereece

Email #5

Subject: New RE Engagement Pilot Program is up and running!

Hi,

Be sure to check out the New RE Engagement Pilot Program for the Baja 4!

Please spread the word!

Best,

Email #6

Sent to Jamili on 2/26/21 for her to send through constant contact and/or use for advertisement purposes for 2nd hour on March 14, 2021.

Subject: Thank you for your participation and join our focus group session

Good morning,

Thank you so much for your participation in the new RE engagement pilot program with the Baja 4 congregations.

In case you have not met me yet, my name is Amy Huntereece. I have coordinated with Jamili Omar and am pleased to communicate with you today about an exciting opportunity. I am a Unitarian Universalist Religious Educator from Flagstaff, Arizona. I am also currently a PhD candidate at Antioch University in Leadership and Change. My dissertation focus is Religious Education in the UU church. I created a research study based on my interest in redefining engagement and creating changes that are needed and wanted by you, the families of Baja 4.

We would like to invite you to a focus group session on **March 14, 2021 at 12:15 PM** Arizona Time. We will briefly present some of our findings from the study we conducted with the Baja 4 families in religious education. Then we will open the floor to you and ask for your feedback on the new RE engagement pilot program. We are interested your opinion, impressions, and most of all if you feel the pilot program was meaningful, attainable, and sustainable!

So, in the meantime, be sure to check out the plethora of engagement opportunities in the new RE engagement pilot program.

All are welcome regardless of amount of participation in the program.

Best,

Email #7
Sent to participants 3/8/21
Subject: Your input needed for a few things
Good day!

I am writing up the interview data and would like to make an offer to you.

As promised, I am deidentifying all personal information. **Would you like to create your own pseudonym?** If you do not, that is fine, and I will create one for you. Please reply to this message and let me know your preference as soon as you have a chance. Thank you!

Please also remember that your participation in the pilot program is extremely helpful and expected. *Check out the plethora of engagement opportunities in the new RE engagement pilot program*. You will see some of your own ideas manifested there. Please be sure to "register" and "sign off." You will not include your name, but this procedure lets me know if folks are finding it. I am also actively blogging about the pilot program. You can find great support and advice for UU parents there.

Last, could you please look over this "glimpse" I wrote of you? I would like your approval to include this in my dissertation. Please include your "thumbs up, go ahead, approval" in the reply to this message.

Thank you.

Amy

Appendix C: Huntereece Dissertation Participant Selection Form

Huntereece Dissertation Participant selection

This form will allow Amy Huntereece and her research team to gather important personal information about anyone in the Baja 4 cluster of Unitarian Universalist congregations who desires to be a participant in their dissertation research study.

* Required

1. Email address *

    _____

2. First and Last Name *

    _____

3. What is a good phone number that we can send a text message if necessary? *

    _____

4. Which of the following Baja 4 congregations are you affiliated with?

    Mark only one oval.

    ( ) Unitarian Universalist Congregation of Tucson in Tucson

    ( ) Mountain View Unitarian Universalist Congregation in Tucson

    ( ) Borderlands Unitarian Universalist in Amado

    ( ) Sky Island Unitarian Universalist Church in Sierra Vista

    ( ) None of these

5. What year were you born?

    _____

6. What generation were you born into?

    Mark only one oval.

    ◯ Gen X (born 1965-1980)

    ◯ Gen Y or Millennial (born 1981-1996)

    ◯ Neither of these

7. Do you also identify with the threshold microgeneration called Xennials (born 1977-1985)?

    Mark only one oval.

    ◯ Yes

    ◯ No

    ◯ I don't know.

8. Are you a parent or guardian of at least one child age 0-18 years old?

    Mark only one oval.

    ◯ Yes

    ◯ No

This content is neither created nor endorsed by Google.

Google Forms

Appendix D: Consent to Participate

12/28/2020 Consent to Participate

Consent to Participate

This is a consent to participate form for a dissertation research study developed by Amy Huntereece for her doctoral research at Antioch University.

* Required

1. Please read through this consent form

Type your first and last name below if you consent to the terms. *

2. What is today's date? *

Example: January 7, 2019

Consent Form
(Available at the link in question 1 on the Consent to Participate)

Project Title: Shifting Paradigms: Using Action Research to Redefine Engagement in Religious Education in the Unitarian Universalism

Principle Investigator: Amy Huntereece
Antioch University Dissertation Committee Chair: Dr. Lize Booysen
Antioch University IRB Chair: Dr. Lisa Kreeger

1. I understand that this study is of a research nature. It may offer no direct benefit to me.
2. Participation in this study is voluntary. I may refuse to enter it or may withdraw at any time without creating any harmful consequences to myself. I understand also that the investigator may drop me at any time from the study. There are minimal, if any, risks from participating. All demographic data and opinions being collected will be reported as aggregated information. No personally identifiable information will be associated with your responses to any reports of these data.
3. The purpose of this study is to gather data regarding Gen X and Millennial parents'/caregivers needs, desires, and expectations about the current model their congregations are using in their RE programs.
4. As a participant in the study,
    • I will participate in an interview and/or
    • I will participate with my family in the new engagement pilot program that is proposed to serve as RE curriculum March 1, 2021–March 30, 2021 and/or
    • I will attend and contribute in the focus group on March 28, 2021.
5. The risks, discomforts and inconveniences of the above procedures might be:
    •Time frame for scheduling the interview and participation in the entire study.
6. The possible benefits of the procedure might be:
    • The results may lead to an iterative process of learning and further studies on the topic.
    • The results of this research may be included in future scholarly presentations and publications.
7. Personal identifiers will be removed and the de-identified information may be used for future research without additional consent.
8. "I intend to include the data and results of the study in future scholarly publications and presentations. Our confidentiality agreement, as articulated above, will be effective in all cases of data sharing" If you have any questions about the study, you may contact AMY HUNTEREECE, at ███████████ or via email at
If you have any questions, please contact our Leadership and Change Chair of the Institutional Review Board. The current chair of the IRB is Dr. Lisa Kreeger

Appendix E: ALFIFF (Assessment of Learning Families in Faith Formation)

This evaluation gives the RE professional the ability to explore the parent/child experience and learning acquisition while engaged in a faith formation opportunity. Key concepts in the 7 UU principles and Rudolf Steiner's 12 senses serve as the goal elements for each engagement opportunity. This assessment will inform decisions for engagement in an RE program. Curriculum, programming, and frequency of engagement types can be planned from a place of informed data.

Assessment of Learning Families in Faith Formation

Key Concepts of UU Principles	Willing				Feeling				Thinking			
	Life	Movement	Balance	Touch	Smell	Taste	Sight	Temperature	Hearing	Speech/ word sense	Thought	Ego
1 Dignity												
2 Worth												
3 Justice												
4 Compassion												
5 Acceptance												
6 Encouragement												
7 Freedom												
8 Conscience												
9 Democratic process												
10 Peace												
11 Respect												
12 Connectiveness												
13 Beloved Community												

Any program in a Unitarian Universalist congregation refers to the seven principles as the foundation for development.

Our seven principles are:

1. The inherent worth and dignity of every person;
2. Justice, equity, and compassion in human relations;
3. Acceptance of one another and encouragement to spiritual growth in our congregations;
4. A free and responsible search for truth and meaning;
5. The right of conscience and the use of the democratic process within our congregations and in society at large;
6. The goal of world community with peace, liberty, and justice for all;
7. Respect for the interdependent web of all existence of which we are a part.

(2018, April 10). Retrieved from https://www.uua.org/beliefs/what-we-believe/principles

This inventory also uses Steiner's work with the 12 senses. Rudolf Steiner was a clairvoyant thinker and his indications regarding child development and education formed the foundation for Waldorf Education. He elaborated on his ideas about the 12 senses in the late 1800s. He gave

regard to conditions that exist within our whole human existence, physical (our will), feelings, and thinking, and proposed their formation and inception in relationship to developmental stages of the human. He emphasized that certain senses must be nurtured with enriching activities during those particular developmental stages.

Willing/Physical Senses

     Life, Movement, Balance, and Touch

Feeling Senses

     Smell, Taste, Sight, and Temperature

Thinking/Knowledge/Spiritual Senses

     Hearing, Speech/Word Sense, Thought, and Ego

Steiner, R. (1986). *Spiritual science as a foundation for social forms* [Geisteswissenschaft als

Erkenntnis der Grundimpulse sozialer Gestaltung] (M. St. Goar, Trans.). Anthroposophic Press.

(Original work published in 1920).

Appendix F: Advertisement Flyer for New Baja 4 RE Engagement Pilot Program

The full advertisement flyer cannot be included because of its demand on memory space.

A copy of the advertisement flyer can be view here.

Appendix G: Thank You Email to Participants

Email #3 to Baja 4 Families

Subject: Thank you for your participation and join our focus group session

Good morning,
Thank you so much for your participation in the new RE engagement pilot program with the Baja 4 congregations.

We would like to invite you to a focus group session on March 14, 2021 at 12:30 PM Arizona Time. We value your feedback and are interested your opinion and impressions about the pilot program.

All are welcome regardless of amount of participation in the program.

Best,

Appendix H: Permissions for Use of Tables and Figures

Figure 2.2 The Productive Zone of Disequilibrium

Tim Cannon (Harvard Business Publishing)

Apr 16, 2021, 12:25 PM EDT

Dear Amy Huntereece,

Thank you for your email. Please note that as long as the requested Harvard Business Press Book Figure 2-4: The Productive Zone of Disequilibrium is only being used to fulfill the class dissertation assignment in the pursuit of your Antioch University degree, HBP permission would be granted at no charge for use in your upcoming "Shifting Paradigms: Using Action Research to Redefine Engagement in Faith Formation in Unitarian Universalism" (including ProQuest and OhioLINK) provided the excerpted HBP book material is fully cited (see following):

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Good luck with your upcoming Antioch University dissertation,

Regards,
Tim Cannon
Permissions Coordinator
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Figure 3.1 Lewin's Spiral of Steps for Action Research

From: ███████████████████
Sent: Saturday, April 17, 2021 5:46:19 PM
Subject: permission request to use an exhibit

No worries just adapt, acknowledge and publish. Best of luck,

Mark

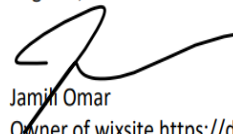**Figure 4.1 Home Page for the New Baja 4 RE Engagement Pilot Program**

4/16/2021

Dear Amy Huntereece,

Thank you for your request for permission to use content on the wixsite
https://dreuuct.wixsite.com/uuquest.

I give you permission to use content from https://dreuuct.wixsite.com/uuquest to fulfill the class
dissertation assignment in the pursuit of your Antioch University degree, for use in your upcoming
"Shifting Paradigms: Using Action Research to Redefine Engagement in Faith Formation in Unitarian
Universalism" (including including Proquest and OHIOlink).

Regards,

Jamil Omar
Owner of wixsite https://dreuuct.wixsite.com/uuquest