

## Document Your SGM History For the Future

From the UU Small Group Ministry Network Board of Directors

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*Those who fail to learn the lessons of history are doomed to repeat them.* - George Santayana

Documenting a Small Group Ministry's history and model preserves it for the future and ensures the integrity and longevity of the program. Is your program adequately documented? What is the appropriate place for this documentation?

As we learned at the SGM Network's General Assembly booth, a recurring concern is the lack of program records to guide ministers and lay leaders. The unfortunate result is that a congregation's small group ministry history and model may be lost during leadership transitions. Incoming clergy and program coordinators may be at a loss to know how the program started, how it works, and what guiding resources are available.

Consider these common scenarios:

- The minister who started small group ministry in your church is leaving to serve another congregation.
- The lay leader overseeing SGM and training facilitators has just stepped down.
- Small Group Ministry is now in the portfolio of the newly hired Minister of Congregational Life.
- A newly formed SGM Steering Team will now assume leadership of the program.

Transitions such as these require passing on our SGM program history. Before that can happen, we must decide what information is crucial and where it should be kept. In short, how can we best keep our institutional SGM memory?

The Small Group Ministry program at First Unitarian Church of San Jose, CA has done an exemplary job of documentation on their website. We spoke with Julia Rodriguez, long-time chairperson of San Jose's SGM Council, about the elements to include. The following list provides a starting place for preserving your own congregation's SGM history.

### **Essential elements to document:**

Small Group Ministry mission and goals

The program's "creation" story

The timeline from planning stage to program launch

The people or roles involved

The program model and policies, including participant guidelines

Program publicity, recognition, and celebrations

Session format and topic sources

The facilitator training program

The facilitators' guide or manual plus additional resources

Promotional materials including brochure, fliers, Q & A, and sign-up form

Program budget information

Staff and ministerial liaisons?

Resources available, including the UU SGM Network website, Network member benefits, and renewal information

### **Safe-keeping locations:**

Preserve the essential elements of your SGM history in the minister's files, the program coordinator's or steering team's notebook, and in the facilitator's guide. Include the program's history and policies on the Small Group Ministry page of the church website. For long term safe-keeping, add a complete documentation of the SGM program to your congregation's policy and procedures manual. Lastly, make note of who maintains the participant database and where it is stored.

Consider annual updates to your history with the addition of program evaluations, changes, and improvements; enrichment training topics; and participant data.

For further information about what and how to document SGM history and policies, visit the web pages of The First Unitarian Church of San Jose:  
[http://sanjoseuu.org/FUSJC\\_SGM/sgmhistory.htm](http://sanjoseuu.org/FUSJC_SGM/sgmhistory.htm) and  
[http://sanjoseuu.org/FUSJC\\_SGM/sgm\\_faq.htm](http://sanjoseuu.org/FUSJC_SGM/sgm_faq.htm).