

**BEACON PRESS DISCUSSION GUIDES**

for Unitarian Universalist Communities

# Taking Retirement

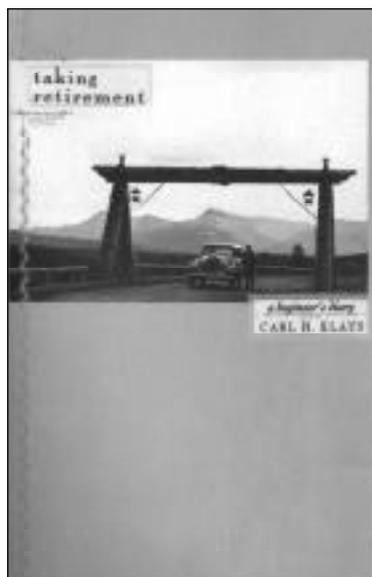
*A Beginner's Diary*

CARL H. KLAUS

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**A LEADER'S GUIDE**

BY WENDY BIVENS



 **Beacon Press**  
[www.beacon.org](http://www.beacon.org)

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***Taking Retirement: A Beginner's Diary***

**by Carl H. Klaus**

Beacon Press, 1999/\$16.00/paperback/0-8070-7219-2

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Leader's Guide

by Wendy Bivens

0-8070-9151-0

## INTRODUCTION

The word “retire” is derived from the French verb *retirer*, made up of the prefix *re-*, meaning “back” and the verb *tirer*, “to draw,” together meaning “to take back or withdraw.” In retiring from occupations that we have followed as our lifework, we retreat from activity in which we have invested time, energy, our sense of ourselves and our future—activity that has created and/or defined our relations with others.

Because work holds a unique place in our lives, we process retirement in different ways. A person’s outlook on retirement can be shaped by how deeply work determines his/her sense of identity, how well it affirms his/her work ethic, the level of success and fulfillment in this work, its physical toll, compensation, and environment. The ease with which we experience the retirement journey depends largely upon our state of health and well-being. A sense of wholeness in relationships and in community, economic stability, physical and emotional wellness, access to essential resources like health care, spiritual groundedness—these factors can be of enormous influence during any period of change. Even in the best of circumstances, many of us struggle to feel balanced and well.

The shift into retirement can touch every aspect of our being, and it is often with feelings of vulnerability that we face later life stages. In our state of flux, we re-visit an internal dialogue about survival, mortality, how we define ourselves, and how in our daily existence we fulfill our purpose. Further questioning leads us to consider:

- What constitutes the fabric of our lives, and what are the essentials?
- What prepares us to experience life and its transitions?
- What are our attitudes toward aging and the elderly?
- How does our sense of identity evolve as we age?
- What grounds us and keeps us in touch with our feelings and sense of identity when our life circumstances are changing?
- How can we heighten our connection to what sustains us when times are hard?

In *Taking Retirement: A Beginner’s Diary*, Carl Klaus discloses his thoughts and feelings as he reluctantly disengages from a prominent position in an academic setting. With him we discover that in his rocky transition, he is laying the path to a whole new life.

The purpose of this discussion program is to provide a framework for UU discussion groups to share ideas about:

- encountering changing landscapes—emotional, spiritual, physical and material—as we enter retirement;
- achieving serenity and acceptance in this and other challenging life phases;
- honoring, affirming and supporting our elders and those of us who are approaching or in the midst of retiring.

This program has relevance for adults of all ages. We offer it with the hope that it creates a space for authentic sharing between UU elders and encourages intergenerational dialogue about aging and life transitions.

## **GETTING STARTED**

### **Promote the Program**

Many congregations have a number of resources for publicizing new programs in the community. It is always a good idea to create flyers and post notices on bulletin boards and in newsletters. Announcements could also be made during meetings and services. You might consider targeting specific groups to embark on this journey. For example, an “over-fifties” discussion group might have particular interest in this program. Some congregations promote new programs by organizing “Kick-off Sundays,” which include a sermon by a minister or lay leader about a related topic.

### **Adjust the Format as Needed**

This program includes reading, reflection, and participation in two ninety-minute discussion sessions. (The format can be adapted to one session.) We recommend a group size of no more than ten people.

### **Provide a Comfortable Setting**

Hold the session in a comfortable setting, well-lit setting, preferably with cushioned chairs arranged in a circle. Some discussions will be carried out in small groups (3-4 people), so it is important to find a space that will enable uninterrupted discussion for small groups as well as for the larger group. The discussion sessions

call for information to be recorded on newsprint, so you will need adequate wall space or easels to display what has been written. You might ask volunteers to provide refreshments and perhaps a light snack.

### **Involve the Group in Setting the Tone**

The group should take responsibility for creating an environment that is welcoming and conducive to open dialogue. Bring to the group’s attention the importance of active listening, thoughtful responses and mutual respect. Also, note that occasional silences are acceptable. Use people’s own experiences as a way to ground the discussion when it threatens to become too abstract.

Some people have a tendency to be more vocal than others. If a few people clearly dominate the conversation, you might need to open a space for those who have not had a chance to speak to do so if they wish.

As a discussion leader, it is important to establish a balance between too much control and too little direction. It will be important to be responsive in your leadership and draw people out, yet keep the discussion on track.

We suggest that the group draft a set of ground rules at the beginning of the first session, post them on newsprint, and review them at the beginning of the second session. If all participants give input, everyone will be accountable to the group’s needs. Ground rules might include such items as: maintain confidentiality—don’t repeat personal stories outside of the group; make personal (“I”) statements—don’t speak for others; give full attention to the person who is speaking; pagers and cell phones should be turned off; and so forth.

### Prepare for the First Session

Participants should read *Taking Retirement: A Beginner's Diary* in its entirety before the first session. Ask them to maintain a journal during this period of reading and reflection. This activity might offer insight into Klaus' challenges in shaping his book. Participants might also learn to appreciate journal writing as a tool for connecting with the inner voice. Encourage participants to give their journal a special place in their daily activities, one that is comfortable and allows them to quiet outer distractions. Stress that they should be consistent about their journal-writing ritual, but note that journal entries can be brief. Give participants the option of either keeping the journal as a daily log of their activities or a focused diary similar to *Taking Retirement*. Suggest topics for their journal dialogues, such as:

- ❑ the present phase of a relationship with a partner, family member or friend;
- ❑ their spiritual lives in practice;
- ❑ feelings and thoughts about an upcoming event;
- ❑ some aspect of their lives that they would like to change.

Indicate that although individuals will not necessarily share their writings, the group will discuss the processes and outcomes of their journal-writing experience.

Before the first session, photocopy the opening readings (pp. 6-7) and clip each of the brief quotes from your copy. Fold the slips of paper and place them in a basket.

### Evaluate the Program

Two evaluation forms are provided in the last pages of this guide. Participant Evaluation Forms should be distributed at the end of the final session so participants can give feedback to group leaders. (Note that questions 7 and 8 on the form give leaders a chance to pose their own questions to participants.) Also, be sure to send Beacon Press your completed Leader Evaluation Form. We are striving to meet the program needs of UU congregations, and your continued feedback and suggestions will bring us a long way toward reaching our goal. We really want to hear from you!

## **SESSION ONE**

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**Materials:** Newsprint, markers, masking tape, chalice, candle, matches, photocopy of pp. 6-7, scissors, basket, paper, pens

### **Opening and Check-In:**

Welcome participants and make sure everyone knows where to find restrooms, water, a telephone, etc. Introduce the program, allowing time for people to ask questions. Circulate a sheet of paper and ask everyone to write down their contact information for your records.

Each session will begin with a period of reflection and a general check-in. In this first session, participants should introduce themselves and state their expectations for the program.

Ask a volunteer to record on newsprint as participants determine ground rules for participation in this group (see “Getting Started”). Post the rules and review them at the beginning of the next session.

In opening this session, light the chalice and pass the basket (with quotes) around the circle. Ask each participant to pick out a slip and read it aloud. After everyone has read, allow for a moment of quiet reflection on the myriad of thoughts and feelings that were voiced. You might want to solicit more quotes for future groups that go through this exercise.

## Opening Readings\*\*

Age seldom arrives smoothly or quickly. It's more often a succession of jerks.

JEAN RHYS, in *Observer* (1975)

So whatever comes of my life will only be revealed in the fullness of time,  
preferably when I'm on my knees in the garden.

*Taking Retirement: A Beginner's Diary* (p. 75)

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I am luminous with age.

MERIDEL LE SUEUR, title poem, *Rites of Ancient Ripening* (1975)

We did not change as we grew older; we just became more clearly ourselves.

LYNN HALL, *Where Have All the Tigers Gone?* (1989)

The spring flowers had survived the snowstorm by staying flexible, by the natural expedience of bending rather than breaking.

*Taking Retirement: A Beginner's Diary* (pp. 66-67)

I've got everything I always had. Only it's six inches lower.

GYPSY ROSE LEE, in Barbara McDowell and Hana Umlauf, *Woman's Almanac* (1977)

It was formerly a terrifying view to me that I should one day be an old woman.  
I now find that Nature has provided pleasures for every state.

LADY MARY WORTLEY MONTAGU, letter (1747), in Octave Thanet, ed.,  
*The Best Letters of Lady Mary Wortley Montagu* (1901)

Old age is not an illness, it is a timeless ascent. As power diminishes, we grow  
toward the light.

MAY SARTON, in "The Family of Woman:  
Growing toward the Light," *Ms.* (1982)

A flurry of attention and then a long and quiet life.

*Taking Retirement: A Beginner's Diary*

I am furious at all the letters to answer, when all I want to do is think and write poems....I long for open time, with no obligations except toward the inner world and what is going on there.           **MAY SARTON**, *Journal of Solitude* (1973)

Dread of one's own aging leads to fear and dislike of old people, and the fear feeds upon itself. In Western society this cycle of dread has been going on a long, long time.           **ALEXANDRA ROBBIN**, *Aging: A New Look* (1982)

Maybe our true work only begins once we're free to do the things we've always yearned to do.           *Taking Retirement: A Beginner's Diary* (p. 168)

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I am enjoying to the full that period of reflection which is the happiest conclusion to a life of action.           **WILLA CATHER**, *Death Comes for the Archbishop* (1927)

The birds sing louder when you grow old.           **ROSE CHERNIN**, in Kim Chernin, *In My Mother's House* (1983)

Perhaps things just fall into place in retirement, as in a garden, without one's even knowing it.           *Taking Retirement: A Beginner's Diary*

I am a restlessness inside a stillness inside a restlessness.           **DODI SMITH**, *I Capture the Castle* (1948)

A person can run for years but sooner or later he has to take a stand in the place which, for better or worse, he calls home, do what he can to change things there.           **PAULE MARSHALL**, *The Chosen Place, The Timeless People* (1969)

I'm beginning to feel as if living well were all that mattered. Not as the means to an end, but as an end in itself.           *Taking Retirement: A Beginner's Diary* (p. 162)

\*\*Mostly taken from *The Beacon Book of Quotations by Women* (1992), compiled by Rosalie Maggio.

### Discussion: Envisioning Retirement

Most of us grew up with retired relatives or friends in our family circles, and we often formed ideas about retired life based on these relationships. As adults, our own experiences, relationships and knowledge of present realities for seniors have probably altered our visions of life in retirement.

Separate into small groups (3-4 people). Allow about 5 minutes apiece for participants to describe how work was generally valued in their households and communities when they were growing up. Ask them to recall an experience from this period—even if it’s a sketchy memory or impression—that involved a retired relative or friend. (Participants might share stories about a relative whose life-long work gave them a sense of pride, the impact of long-term unemployment, a close relationship with an elder relative or friend, someone who retired at a relatively young age, abundance or sparsity in the home of an elder, a live-in aging relative, confusing bureaucracy regarding retirement benefits, etc.)

Ask: How might your perceptions of this experience have influenced your work life? How might they impact your own retirement experience?

In the larger group, ask participants what they hope to have in place as they reach retirement. For those who have already retired, ask in what ways they were prepared and what took them by surprise.

### Exercise: Growing through Transitions

Some participants might have a few (or many) years before reaching retirement age. Their thoughts about life transitions might help them get closer to some of the issues that arise in Klaus’ journal. Ask participants to list what they have experienced to be transitional life events (a volunteer should record on newsprint). These might include birth, graduation, marriage, relocation, a new project, job promotion or firing, divorce, a new friendship,

change due to death or illness, spiritual or personal transformations, etc. Ask: What aspects of these experiences are similar?

Point out that Klaus was in the midst of a well-planned, phased-in retirement, yet he found that he needed to keep a diary to deal with bittersweet feelings “about giving up the classroom, [his] office, and the community of [his] colleagues and students.” Ask: Has journal writing helped in situations when you’ve needed time for your emotions to catch up with your reality? Explain. What other methods have worked? Has your experience with the journal writing exercise for this program given any insight into Klaus’ skill? Explain.

Have participants focus on two periods in their lives during which they experienced a major life change (perhaps one in their youth and another more recent event). Ask them to write a journal entry in answer to 3 or 4 of the following questions:

How has the quality of your experience during transitions varied, in terms of your:

- sense of identity?
- control over your circumstances?
- ability to let go?
- sense of security?
- feelings about next steps?
- sense of understanding and support from a partner, family and friends?
- wisdom at hand from previous experiences?
- personal growth?

Have you spent a significant amount of time not being in transition? If so, what did it feel like?

## Discussion: Relating to Oneself; Relating to Others

Have participants separate into groups of 3-4, encouraging them to mingle so that they work with a new set of people, then ask:

Recall the June 1 entry, when the author's wife, Kate, reminded him that they are partners in a life journey. Ask how Kate's presence is felt within Klaus' journal. Also ask: In the absence of a strong marriage partner, is it possible to have someone with a similar presence? How might heterosexism and homophobia get in the way of such a relationship?

How did you react to Klaus' anxiety over his department's plan to honor him and his discomfort with people asking questions about his retirement? Was there something about Klaus' nature that made it hard for him to share his experience with his colleagues and friends, or was there something that they couldn't communicate, or both? Explain. Have you had similar reactions to others' well-intentioned efforts? Explain.

Why do you think Klaus found tranquility in gardening? What gives you a sense of peace when you are adjusting to new life circumstances?

In the larger group, ask: How does your spiritual practice affect your experience with transitions, and vice versa? What brings to your awareness that you have moved beyond a period of transition?

## Preparation for the Next Session

Tell participants that they will be asked to work together in small groups to create a plan for a ritual that your faith community might use to honor, enrich and affirm members who are approaching or in the midst of retiring. Ask them to think about the role of ritual in your worship life and what it would take for your congregation to embrace a new spiritual expression. Indicate that each group will present its at the end of the next session.

You might choose to have small groups get together before your next meeting so that peo-

ple can give more thought to the ritual and (possibly) involve the larger group in some aspect of the presentation. If you choose to do so, go over the instructions under "Session Two - Exercise: Create a Ritual" before the end of this session.

## Closing Reading

Close this session with the reading below or another selection of your choosing.

### *Prayer for Those Gathered in Worship*

*In this familiar place, listen:  
to the sounds of breathing, creaking chairs,  
shuffling feet, clearing throats, and sighing all around  
Know that each breath, movement, the glance  
meant for you or intercepted  
holds a life within it.*

*These are signs  
that we choose to be in this company  
have things to say to each other  
things not yet said but in each other's presence still  
trembling behind our hearts' doors  
these doors closed but unlocked  
each silent thing waiting  
on the threshold between unknowing and knowing,  
between being hidden and being known.*

*Find the silence among these people  
and listen to it all—breathing, sighs,  
movement, holding back—  
hear the tears that have not yet reached their eyes  
perhaps they are your own  
hear also the laughter building deep where joy abides  
despite everything.  
Listen: rejoice. And say Amen.*

BARBARA PESCAN  
*Morning Watch*, 1999

from *100 Meditations: Selections from Unitarian Universalist  
Meditation Manuals*, collected by Kathleen Montgomery.  
Boston: Skinner House Books, 2000.

## Closing Circle

Ask participants to join hands and reflect on the many opportunities we have to be present with each other.

## SESSION TWO

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**Materials:** Newsprint, markers, masking tape, chalice, candle, matches, paper, pens, photocopies of the Participant Evaluation Form

### Check-In

Going around the circle, invite participants to share a gift that they have received since your last meeting.

### Opening Reading

To open the session, light the chalice and share the reading below or another selection of your own choosing.

#### *Because We Mean It*

*May those who follow after us sense our happiness, our involvement, our feeling of self-worth and group accomplishment. May we share with them not only our fears and uncertainties, but also the style with which we face-down our troubles and shortcomings. Whether in laughing bravado or in steadfast determination, may we leave examples of endurance, of wisdom, of joy, and of compassion. From our persistent stance, may those who follow learn of bravery and generous living.*

*Life has a sweetness and a charm, for all its manifold failures and shortcomings and torments. A few years of peace, a few crusts of bread, a few words of love—and even the most pessimistic want to run the risks of life. It takes so little to make us happy, and so much to make us sad. If this were not so, the human race long since would have given up! We are here because we have not given up. We are here to continue to risk all for life. We are here because we mean it!*

ROBERT MARSHALL

73 *Voices*, 1972

from *100 Meditations: Selections from Unitarian Universalist Meditation Manuals*, collected by Kathleen Montgomery. Boston: Skinner House Books, 2000.

### Exercise: Journal Entry

After the reading, allow for some silence, and have participants write a journal entry about something that is exchanged between the young and old.

## Discussion: Aging

The author gained a great deal of wisdom from those he encountered, yet his internal struggles with aging were mirrored in his dealings with others. He feared losing touch with young people, but realized that he had little in common with increasingly younger colleagues (see entry for May 4). He witnessed isolation, depression, loss of loved ones, dwindling financial resources, loss of autonomy, and failing health becoming common elements in the lives of aging friends and relatives (“It’s like looking in a mirror, the mirror of memory, only you wind up facing reality.” [August 7]), and was haunted by his wife’s sobering question about their future (“How many good years do you think we have left?” [May 1]). He was forced to explore painful issues of his own internalized ageism and dread of being “ghettoized in the world of the aged” (see entries for March 24, June 25 and September 5).

Separate into small groups and ask participants to discuss the following questions: Have you had similar struggles with aging? Explain. What aspects of our culture and lifestyles foster isolation of elders?

Recall Klaus’ visit with his Aunt Ada during a critical time in her life (March 7-9). Describing how she’d changed in his eyes after years of separation, the author states that “it seemed [she] had reached the point of no return (p. 18).” Do you think she felt the same way? Explain.

Klaus ends his entry about their visit with the following statement:

Yet nothing she said sticks so clearly in my mind as her parting words when I was still holding her hand in mine— “You and all the others have lives of your own. I know that. I know you can’t stay here. I just wish you didn’t have to leave me alone in this place. But that’s how it has to be, and there’s nothing I can do about it.” Nor was there anything I could do just then that might ease the pain for either of us. I was leaving and so was she, both of us heading for places that would put us further apart than ever before. (p. 22)

In the larger group, ask for general reactions to this passage, then ask: What feelings arise when you experience similar moments, and how do you generally respond? What possible actions (small or large) might be supportive to someone in a situation similar to that of the author’s aunt?

## Exercise: Creating a Ritual

Ritual is a powerful tool for holding the sacredness of the Spirit, spiritual unity and hope before a faith community. It can also help us move closer to understanding our purpose in the spiritual realm. In *Ritual: Power Healing and Community* (Portland, Oregon: Swan Raven and Company, 1993), Malidoma Patrice Somé describes the unique place of ritual in his tribal tradition—that of the Dagara people of Burkina Faso, West Africa. The Dagara consider themselves to be a “projection of the spirit world composed of the world of the ancestors,” and ritual is the “yardstick by which people measure their state of connection with the hidden ancestral realm.” To the Dagara, what happens at the divine level is essential, and ritual should always precede human involvement with the world and with each other. In sharing Dagara wisdom with Western audiences, Somé teaches that social decay begins to work from the inside out when the focus of everyday living displaces ritual. The fading and disappearance of ritual in modern culture is, from the viewpoint of the Dagara, expressed in the weakening of links with the spirit world, and general alienation of people from themselves and others.

Ask participants how they experience the practice of rituals in your faith community. Have them separate into groups of 3-4 people in order to plan a ritual to honor, enrich and affirm members who are approaching or in the midst of retirement. The rite can address any of the issues that have arisen in your discussion of *Taking Retirement*, and should include the following elements:

- a statement of purpose
- clarification of who or what determines someone's readiness to take part
- opening and closing prayers to invoke the presence of the Spirit and to honor spiritual unity
- a task
- healing
- instruction and mentoring
- celebration
- a closing

Allow about 45 minutes for the groups to plan their rituals, then have each group present its plan to the larger group.

### Closing Reading

End the session with the following reading or another selection of your own choosing.

*May we be reminded here of our  
highest aspirations,  
and inspired to bring our gifts of  
love and service to the altar of  
humanity.*

*May we know once again that we  
are not isolated beings  
but connected, in mystery and  
miracle, to the universe,  
to this community and to each  
other.*

ANONYMOUS

from *Singing the Living Tradition*, Boston: Unitarian  
Universalist Association, 1993.

### Evaluations

Distribute the Participant Evaluation Forms. Ask participants to complete them and return them to you.

## ACKNOWLEDGMENTS

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Advisory Committee: Donna Bivens, Co-Director, Women's Theological Center; Rev. Nancy Bowen, Clara Barton District Consultant; Rev. Marjorie Bowens-Wheatley, Adult Programs Director, UUA Dept. of Religious Education; Jacqui James, Anti-Oppression Programs and Resources Director, UUA Dept. of Religious Education; Rev. Meg Riley, Director of UUA Washington Office, Dept. for Faith in Action

We are grateful for assistance from the New Hampshire Vermont, Pacific Northwest, Thomas Jefferson, Joseph Priestley, Pacific Central, and Northeast Districts and for support from the Unitarian Universalist Veatch Program at Shelter Rock.

### For further reading we recommend the following Beacon books:

*Lifecraft*, by Forrest Church  
*Life in a Day*, by Doris Grumbach  
*Life Work*, by Donald Hall

# BEACON PRESS DISCUSSION GUIDES

## Participant Evaluation Form

Name (optional): \_\_\_\_\_ Date: \_\_\_\_\_

Group Leader: \_\_\_\_\_

Book Title: \_\_\_\_\_

*Please indicate your evaluation of the following:*

<b>meeting space</b>	poor	fair	okay	good	great
<b>pacing</b>	poor	fair	okay	good	great
<b>content</b>	poor	fair	okay	good	great
<b>overall</b>	poor	fair	okay	good	great

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1. Do you think the sessions were: (Please check one)

\_\_\_\_too long                      \_\_\_\_about right                      \_\_\_\_too short

How long would you like the sessions to be? \_\_\_\_\_

2. Do you think there were: (Please check one)

\_\_\_\_too many sessions      \_\_\_\_the right number of sessions      \_\_\_\_too few sessions

If you thought there were too many sessions, which one(s) would you leave out?

\_\_\_\_\_

3. If your large group broke into smaller groups for discussion, did this process work? Why or why not?

\_\_\_\_\_

\_\_\_\_\_

4. Is there anything that you would like to have talked about that was not included in the sessions? If so, what? \_\_\_\_\_  
\_\_\_\_\_

5. What activity(ies) did you especially like? Why? \_\_\_\_\_  
\_\_\_\_\_

6. If there was an activity that you feel did not work in this context, can you tell us which activity and why? \_\_\_\_\_  
\_\_\_\_\_

7. Question: \_\_\_\_\_  
\_\_\_\_\_

8. Question: \_\_\_\_\_  
\_\_\_\_\_

9. Please rate your group leader's skills in leading the session(s): (Circle one)  
Excellent            Good            Average            Fair            Poor

10. What suggestions would you offer to the group leader to improve the way the group is conducted? \_\_\_\_\_  
\_\_\_\_\_

# BEACON PRESS DISCUSSION GUIDES

## Leader Evaluation Form

Name (optional): \_\_\_\_\_ Date: \_\_\_\_\_

UU Society: \_\_\_\_\_ District: \_\_\_\_\_

Book Title: \_\_\_\_\_

1. Do you and/or your participants think the sessions were: (Please check one)

\_\_\_\_ too long                      \_\_\_\_ about right                      \_\_\_\_ too short

How long would you like the sessions to be? \_\_\_\_\_

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2. Do you think that there were: (Please check one)

\_\_\_\_ too many sessions      \_\_\_\_ the right number of sessions      \_\_\_\_ too few sessions

If you thought there were too many sessions, which ones would you leave out?

\_\_\_\_\_  
\_\_\_\_\_

3. If your large group broke into smaller groups for discussion, did this process work?

Why or why not?

\_\_\_\_\_  
\_\_\_\_\_

4. Is there anything that you would like to have talked about that was not included in the sessions? If so, what?

\_\_\_\_\_  
\_\_\_\_\_

5. What activity(ies) did you especially like and why?

\_\_\_\_\_  
\_\_\_\_\_

6. If there was an activity that you feel did not work in this context, can you tell us which activity and why?

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7. Do you think the discussion guides will help to promote a stronger sense of community in your congregation? Why or why not?

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8. Can you suggest other books or subjects that might work in this context?

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9. If you changed the format, please describe the changes you made and your reason for making them.

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*Thank you for taking the time to give us your feedback!*

**Please return this form to:**

Helene Atwan, Director  
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*Unitarian Universalism's Voice  
for Good in the Twenty-First Century*

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