Snapshots on the Journey: Assessing Leadership Development

A report of the Unitarian Universalist Association's Journey Toward Wholeness Transformation Committee

September 29, 2010

Dedication

We dedicate this report to the hundreds of leaders who have served, are serving, and will serve our religious tradition with passion, conviction, and generosity. Our association relies on the commitment of *paid staff* who contribute countless hours beyond their paid time as well as *volunteers* who are steadfast in their work to serve our faith.

To the ancestors and elders who have gotten us to this place in history, we are forever indebted to your vision and work, even when imperfect. You have tirelessly served and we hope that your souls have been nourished by all you have done.

To those who serve our faith now, we swell with gratitude that you guide us toward "making a world fair with all her people one."[1] The road is often rocky and yet you persevere and we are the better for it.

And, to those leaders waiting to share their wisdom, we appreciate the ideas you bring, the experiences you have, and your willingness to take over when current leaders transition to former and when it is your turn to welcome new leaders.

In adapting a passage from the sixth chapter of Deuteronomy, we acknowledge that we live in houses we did not build and we drink from wells we did not dig. We dedicate this report to all of the builders of a house of justice and a faith of love.

Our Appreciation

ৡ○ৎ

Be it further resolved that the General Assembly urges all Unitarian Universalist leaders...to engage in ongoing anti-racism training, to examine basic assumptions, structures, and function, and, in response to what is learned, to develop action plans.
~ 1997 General Assembly Resolution:
Toward an Anti-Racist Unitarian Universalist Association

ৡ○ৎ

We express appreciation and gratitude to our lay and ordained Association committee leaders—past, present and future—for their dedicated efforts toward building a more inclusive Unitarian Universalist Association.

In addition, we express our thanks and great respect to those former members of the Journey Toward Wholeness Transformation Committee whose dedication and planning were a part of the foundation of this report: Carolyn Cartland, Catie Chi Olson, Rev. Kelly Flood, Bob Gross, Janice Marie Johnson, CJ McGregor, and Dr. Julio Noboa. Their collective efforts have made the vision of an anti-oppressive, anti-racist, multicultural, inclusive faith community more clear and its reality more possible.

Special thanks to Rev. Jose Ballester (UUA Board Liaison) for his thoughtful support and encouragement; to Taquiena Boston (UUA President's Representative) for her steadfast

---

[1] "Turn Back," #120, *Singing the Living Tradition*.

Table of Contents

Executive Summary

In our last report, *Snapshots on the Journey: Assessing Cultural Competence in Ministerial Formation*, the Journey Toward Wholeness Transformation Committee (JTWTC) focused on the pathway to leadership for our ordained clergy. A natural progression of our focus on leadership was to assess our pathway for volunteer leaders, ordained and laity. Toward that end, we reviewed the roles of the Nominating Committee (an elected body) and Committee on Committees (a subset of the Board of Trustees).

For our study, we employed two primary means of gathering information. Interviews were conducted by a paid consultant and included current members and recent past chairs of the Nominating Committee and Committee on Committees using questions developed by the Journey Toward Wholeness Transformation Committee. An on-line survey was also developed and sent out by the Journey Toward Wholeness Transformation Committee to invite feedback on the experiences of those committee members who were nominated by the Nominating Committee or recommended by the Committee on Committees.

Upon receipt of the resulting data, the committee divided its analysis into three areas of focus: recruitment and selection; anti-oppression/anti-racism/multiculturalism awareness, training and internal processes; and orientation, support, and retention. In doing so, the Journey Toward Wholeness Transformation Committee identified gaps in our initial information gathering. This necessitated follow-up interviews with the new chairs of the Nominating Committee and Committee on Committees.

To facilitate the most effective use of this report, each subsection includes an introduction, findings and observations, analysis, and recommendations. In the introductions, we attempted to set the theological context for our assessment. In the findings and observations, you will find numerous quotes from the interviews and the on-line survey. Quotes were selected as representative of the lived experience of association volunteers who were nominated or recommended by the Nominating Committee or the Committee on Committees. The analysis and recommendations are offered with the knowledge that some may already be in place, some may be beyond the official charge or scope of the committees, and some may be prohibitive given current resource constraints. It is the Journey Toward Wholeness Transformation Committee's hope that these recommendations will be received as possible areas for institutional growth.

The report includes a unified list of recommendations that may be more broadly applicable to groups outside the Nominating Committee and the Committee on Committees. Additionally, the appendices include raw data that may be useful in further analysis. We urge readers to review this valuable resource.

Finally, this report is a snapshot, a memento on the journey we are making together. As in past reports, we still ask:

> *What is our liberal faith for, if not to teach respect for difference: different ways of seeing, differing contexts, different cultural orientations?*

> ~ Rev. Marjorie Bowens-Wheatley
> 2005 sermon at the Unitarian Universalist Church of Tampa, Florida

Introduction

Background

Following our charge from the General Assembly of the Unitarian Universalist Association, the Journey Toward Wholeness Transformation Committee (JTWTC) has continued its focus on assessing and monitoring the Association's progression toward becoming an anti-oppressive, anti-racist, multicultural (AO/AR/MC) faith community. Our purpose is to provide qualitative, in-depth analysis of specific areas of Association life. This was the second, consecutive assessment of leadership processes within the Association.

In our 2008 report to the Board, *Snapshots on the Journey: Assessing Cultural Competence in Ministerial Formation*, we focused on the quality and quantity of attention paid to the cultural competence of Aspirants and Candidates by both the Ministerial Fellowship Committee and the four Regional Sub-Committees on Candidacy. It was a snapshot of how the ministerial formation process was moving toward the goals stated in the two major anti-oppression resolutions passed by the General Assembly in 1997, "Toward an Anti-Racist Unitarian Universalist Association" and "Accessibility for Persons with Disabilities" (Appendix E).

After discussions with the Board and immediate past UUA President, Bill Sinkford, we decided to examine the processes and practices that inform volunteer leadership development in the UUA. We concluded that two key committees, more than any other entities, had the greatest influence on the process of volunteer leadership development: the Committee on Committees (a committee comprised of Board of Trustees members) and the Nominating Committee (a committee comprised of elected members). They are tasked with recommending individuals for Board appointment or election to various committees, boards and commissions of the Board, and positions in the UUA. Between them, the Committee on Committees and the Nominating Committee recruit members for 23 committees, boards, and commissions.

Specifically, the **Nominating Committee** nominates candidates for UUA committees, commissions, and positions that require a degree of independence from the UUA Board of Trustees and are therefore elected by the General Assembly of the Association. The General Assembly, in keeping with the bylaws of the Association,[2] charges the Nominating Committee with "submit[ing] nominations for certain elective positions of the Association. On or before August 1 of each even-numbered year, the Nominating Committee shall notify all certified member congregations in writing of the elective positions at large and vacancies to be filled at the next regular General Assembly."[3] Members of the Nominating Committee are elected to serve terms of 6 years.

The **Committee on Committees** recommends candidates for positions not filled through a process of Nominating Committee nomination and General Assembly election. The full

---

[2] UUA Bylaws—Section 9.3 Notice by Nominating Committee

[3] Home > About Us > Governance > Elected Committees > Nominating Committee > Charge> Charge from the UUA General Assembly accessed on 9/8/2010 @ http://www.uua.org/aboutus/governance/electedcommittees/nominatingcommittee/7360.shtml

UUA Board must approve recommendations made by the committee. The UUA Board charges the Committee on Committees to "seek out and make recommendations of qualified persons"[4] to fill vacancies on Board-appointed committees. Members of the Committee on Committees are appointed to terms of two years, and can be re-appointed up to twice (a maximum of six years in total).

In an effort to live UUA values and reflect the community-at-large, the Board states that it expressly seeks volunteers for these vacancies from the rich diversity of [the UU] movement—theological, philosophical, geographical, political, ethnic, racial, affectional orientation, physical ability, gender and age. Consistent with General Assembly resolutions, the Board also has affirmed intentionality about becoming an anti-racist, anti-oppressions, multicultural institution, and wanting its committees to embody that intention.[5]

As the Journey Toward Wholeness Transformation Committee studied these two committees' operating procedures and methods of implementation as the Association moves forward on its journey toward wholeness, the following questions arose:

1. Can a committee leader who is not culturally competent be fully effective when charged to recommend diverse leadership? (In this context, cultural competence is viewed as a set of capacities that inform every aspect of effective leadership, rather than as an added component or "icing on the cake.")

2. Are all possible steps being taken to find interested individuals who claim historically marginalized identities for leadership positions, and to support them once they are placed in those positions?

With these questions in mind, we proposed that our Association's transformation into the realm of cultural competence will depend on:

1. The depth and breadth of our leaders' understanding and skill in appropriately and successfully navigating the cultural issues and perspectives inherent in past, present, and future Association and congregational life; and

2. The successful recruitment, selection, orientation, support and retention of people with historically marginalized identities who could provide those necessary lenses in influential committees and executive positions in Association leadership.

To those ends, this report focuses on understanding:

1. The extent to which these committees are paying attention to cultural competency and Anti-Racism/Anti-Oppression/Multiculturalism during volunteer leadership recruitment, screening, selection, orientation, support, retention, awareness and training,; and

2. Other internal and external processes currently being employed.

---

[4] > Home > About Us > Governance > Board of Trustees > Committees of the Board > Committee on Committees > Charge > Charge to the Committee accessed on 9/8/2010 @ http://www.uua.org/aboutus/governance/boardtrustees/committeesboard/committeecommittees/8134.shtml

[5] Home > About Us > Governance > Elected Committees > Nominating Committee
http://www.uua.org/aboutus/governance/electedcommittees/nominatingcommittee/8266.shtml

Vision: Building the Beloved Community

৪৩৫৪৪

We have a lot more humanity to learn about, a lot more practicing to do,
with a lot more people than we are used to. If we really mean what we say,
we will have to get a lot better at some very Universalist values: We will have to learn
to love each other more, and in better ways than we do right now. We will have to learn
to forgive each other more, and in better ways, than we are used to doing. We will need
the Universalist gifts of "hope and courage," too.
~ Rev. Rosemary Bray McNatt—June 24, 2009
Berry Street Conference—Unitarian Universalist Ministers Association

৪৩৫৪৪

The Journey Toward Wholeness Transformation Committee is honored to build upon the important thought and work of other Unitarian Universalists, past and present. We note that it is vital to emphasize the transformation that has taken place in our committee's understanding of the definition of 'oppression.' Whereas the 1997 General Assembly resolutions on anti-racism and accessibility were separate and distinct, this report reflects changes in our Association which make clear that these oppressions—along with sexism, ageism, heterosexism, classism, and cultural chauvinism—are inextricably linked and cannot be adequately addressed in isolation. As this committee continues to assess and monitor this transformation within our congregations and our Association, we pay attention to the intersections between these oppressions while recognizing that each oppression has its own individual history, cultural context, and unique place in society.

In this report, we have listened carefully to dedicated Committee on Committees and Nominating Committee members engaged in the difficult work of implementing internal processes and training; and of recruitment, selection, orientation, support and retention of candidates for volunteer leadership positions. Accordingly, we have attempted to accurately portray their dedication and devotion to helping transform our Association into a Beloved Community.

৪৩৫৪৪

Our goal is to create a beloved community and this
will require a qualitative change in our souls
as well as a quantitative change in our lives.
~ Rev. Dr. Martin Luther King, Jr.
"Nonviolence: The Only Road to Freedom" (1966)

৪৩৫৪৪

Theological Context

Unitarian Universalist theologian Paul Rasor stated in his 2009 Berry Street address entitled, "*Ironic Provincialism*," "…we need to become a genuinely multiracial and multicultural faith, both theologically and demographically…not because it is the politically correct thing to do, or because our congregations need yet another exercise in anti-racism and cultural sensitivity training, though they might, or because we think this will attract new members, though it may. Instead, we need to make this collective journey

for spiritual and theological reasons." [6]

As we build the beloved community, our faith, informed by our Seven Principles, calls us to include and honor all of our identities—racial/ethnic, sexual/affectional orientation, gender identity/expression, age, ability, socio/economic, and others. To authentically engage in the democratic process, it is critical to include all people, because of their unique identities. Equally as important is honoring diversity and inclusion in leadership. It is that uniqueness and lived experience that, once gathered, empowers us to fulfill our vision, moving us with strength and boldness toward beloved community.

ଔୠ

In my vision of beloved community, I see a dazzling, light-filled, breathtakingly beautiful mosaic, a gigantic, all-encompassing mosaic, where each of us can see, can really see, and deeply appreciate each piece. We know that each piece is of immeasurable value. We know that each piece is part of a larger whole, a larger whole that would not be whole, indeed would not BE, without each piece shining through to be seen and appreciated as its unique self"
Marla Scharf—March 4, 2009
Homily—First Unitarian Church of San Jose, California

ଔୠ

Historically, we have demonstrated commitment to move forward on the journey toward beloved community. At times we have fallen short, caused pain, and lost members of our community. But our pursuit of becoming truly anti-racist and anti-oppressive has also included accomplishments. What is noteworthy is that they have not happened by chance, they have not happened without leadership, and they have not happened without hard-learned lessons. Today, aware of our past missteps, cognizant of our current challenges and hopeful of our future, we are called to closely examine our pathways to leadership, our institutional systems of support or limitations, and what changes might further us on our journey.

Purpose of the Study

Volunteer leadership plays a pivotal role in the Association as a whole in fundamental aspects of Unitarian Universalist life, and it is important to recognize the critical function of the Committee on Committees and the Nominating Committee as essential filters in the selection of Association leadership positions. They play a vital role in recruiting leaders for our faith community, and are central to our efforts to build a more anti-oppressive, anti-racist, and multicultural community. In conducting this study, the Journey Toward Wholeness Transformation Committee sought to improve its understanding of these committees' perspectives, experiences, and practices as they aligned with the the Unitarian Universalist Association's commitment to Anti-Racism/Anti-Oppression/Multiculturalism.

More specifically, the purpose of the current Journey Toward Wholeness Transformation Committee study was to assess:

    1. How and to what extent people who claim historically-marginalized identities are

---

[6] Rasor, p. 1, 2

recruited, selected, oriented, supported and retained in leadership positions once identified by the Board's Committee on Committees and Nominating Committee of the Unitarian Universalist Association of Congregations; and

2. How the internal and external processes of the committees—including Anti-Racism/Anti-Oppression/Multiculturalism awareness and training, and cultural competence—inform the decisions, selection, and support mechanisms of committee members themselves.

Design/Process Used

In conducting the study, several methods were used to collect data and anecdotal information: an online survey tool, Survey Monkey (www.surveymonkey.com), was sent to all committee members who were nominated or recommended by the Nominating Committee or the Committee on Committees; a series of telephone interviews were conducted with each Nominating Committee and Committee on Committees member by an outside consultant; in-person meetings separately with the Nominating Committee and the UUA Moderator, Gini Courter; informal conversations and follow-up interviews with the Nominating Committee and the Committee on Committees chairs were conducted by Journey Toward Wholeness Transformation Committee subcommittees; and written documentation was requested from both committees.

Committee Documentation

A number of documents were requested from the Committee on Committees and the Nominating Committee. They included:

1. Committee on Committees Demographic Information on Appointments and Applicants (Appendix C)

2. Committee on Committees Orientation Manual for Committee Chairs[7]

3. Nominating Committee Demographic information on Slate Candidates (Appendix C)

4. Committee on Committees Draft Orientation Manual (not yet published)

5. Board of Trustees' Four Levels of Cultural Competence (Appendix E)

Elements of the Study

The analysis of this study focuses on three areas:

1. Recruitment and selection of diverse and culturally competent leadership;

2. Anti-Racism/Anti-Oppression/Multiculturalism awareness, training and internal processes, both within the Nominating Committee and Committee on Committees, which recommend diverse individuals to the Board of Trustees or the General Assembly; and between those committees and the committees to which they nominate or recommend members;

---

[7] Orientation Manual for UUA Committee Chairs
http://www.uua.org/aboutus/governance/boardtrustees/committeesboard/committeecommttees/index.shtml

3. Orientation, support, and retention of those individuals once they are placed in leadership positions.

Each area was studied separately and has its own data compilation, findings, analysis and recommendations. The phone interviews, online survey data, in-person and follow up interviews, and written documentation form the basis of the research for this 'snapshot' report. We greatly appreciated the time, patience, and thoughtful reflections of respondents who participated in the surveys and interviews.

Assessment Tools

Overview

The crux of this Snapshot was the opportunity to bring into focus the status of Anti-Racism/Anti-Oppression/Multiculturalism in leadership development on key committees serving the Board and the mission of the UUA. To capture the information, several assessment tools were used for this report—an online survey, a telephone survey and follow up meetings and interviews with UUA executives, committee chairs and others pertinent to the study. Each of these research initiatives gave the Journey Toward Wholeness Transformation Committee a sense of the issues that affect Anti-Racism/Anti-Oppression/Multiculturalism in these leadership positions and helped us shape this report and its conclusions. The purposes of the research component of this study were:

1. To assess two vetting mechanisms, the Committee on Committees and the Nominating Committee and their application of Anti-Racism/Anti-Oppression/Multiculturalism to candidate and leadership processes,

2. To identify limitations and gaps in current methods that might need to be addressed,

3. To provide recommendations that might be useful in continuing the journey toward wholeness in leadership development.

On-Line Survey

The online survey of nominated and recommended committee members was designed to gauge how leadership recruitment, development and service are moving the UUA toward the goal of being an inclusive, multicultural faith community. While the telephone interviews solicited information from those who serve our association by selecting others who will serve, this instrument was intended to solicit information from those who are selected. The questions (Appendix A) focused on the selection experience as viewed through an anti-oppression, antiracism, multicultural lens and were fill-in the blank, multiple-choice and open-ended narrative formats.

We first requested information on committee assignments, gender and age. We also created defined categories of identity, fully aware that identities of real people do not fit neatly into predefined categories, yet also certain that trends were more likely to emerge if we did use forced choices. We also ended up using age as an identity category in our analysis.

Some of the questions focused on the importance of anti-oppression, anti-racism and multiculturalism to the work of their committee. Other questions explored the value and frequency of training in Anti-Racism/Anti-Oppression/Multiculturalism. We also asked respondents to assess how their identity and cultural competence factored into their selection. From October 14, 2009 through November 11, 2009, the Journey Toward Wholeness Transformation Committee conducted an online survey of committee members elected and appointed to various committees by the Committee on Committees and the Nominating Committee.

Surveys were emailed to every committee member who had served in the last 5 years; a

total of 301 current and past associational committee members were identified, but valid email addresses were only available for 244. Of the 244 people who received surveys, 131 people completed the on-line survey, representing 31 current and past committees, 54% (131/244) of available respondents, and 44% (131/301) of the total population. When compared with the response rate for other surveys conducted using the UUA website, this is an incredibly high rate of response that suggests that respondents deemed the topic important.

The resulting data are compiled and reported in text, chart and graphic form and are included as Appendix B.

It is worth mentioning that the survey asked participants to share their perceptions, not objective facts. For example, respondents were not asked how important the Committee on Committees or the Nominating Committee considered cultural competence or commitment to anti-oppression when making an appointment, but their perception of its importance to the Committees.

We were pleasantly surprised by the amount of anecdotal information that we gleaned in response to our final question which asked if there was anything that respondents wished to share. Some of those comments appear in the body of this report. The large number of responses to this question also suggest that there may not have been venues elsewhere to express some of the opinions offered by respondents.

Telephone Interviews

In June of 2009, the Journey Toward Wholeness Transformation Committee contracted Dr. Susan Gore, The Mentor Group, to be an independent interviewer in a telephone survey of current—and a few past—members and chairs of the Committee on Committees and the Nominating Committee. Approximately 20 interviews took place from September through November of 2009.

In addition to conducting the phone survey, Dr. Gore wrote a report which summarized all of the interviews and which included an analysis of common themes and other reflections that were revealed during the process.

After much discussion and deliberation, the Journey Toward Wholeness Transformation Committee developed eight questions with which to assess leadership development through an Anti-Racism/Anti-Oppression/Multiculturalism lens. The questions were design to capture the committee members' experiences as the Anti-Racism/Anti-Oppression/Multiculturalism gatekeepers for UUA leadership.

The selected questions were:

1. On a personal level, please tell me about your involvement with AO/AR/MC efforts. How has that been affected by your work with the committee? (Nominating Committee or Committee on Committees)

2. How do you understand the mission of the committee (Nominating Committee or Committee on Committees) and how it relates to AO/AR/MC?

3. How were you oriented to the work and culture of the committee? To your knowledge, how was the committee oriented to your joining its membership?

4. Describe a time when you feel the committee was successful in identifying and placing leadership that advanced the goal of diversity in Unitarian Universalism and/or the larger world. What were the things that you feel made that success possible?

5. Describe a time when you think the committee failed in advancing diversity in social group identities within Unitarian Universalism and/or the larger world? What happened in your view?

6. What kind of institutional support (i.e. policies, guidelines, resources, training, etc.) would be required to increase your committee's success in advancing commitment of AR/AOI/MC diversity in Unitarian Universalism leadership?

7. What internal or external processes do you see as necessary to monitor your committee's effectiveness in identifying and placing leadership that reflects the diversity of social group identities within Unitarian Universalism?

8. Imagine it is 2013. How do you predict the committee (Nominating Committee or Committee on Committees) will be different in relationship to AO/AR/MC four years from now?

The interviews presented a diverse range of views and opinions to the eight questions and thus added to the richness of the overall assessment. Some themes that Dr. Gore identified from the phone responses were:

1. **Committee members who were interviewed take their responsibilities very seriously and hold high expectations for themselves and their committee work.** This degree of seriousness was seen as promoting a "risk-averse" approach to candidate recommendations, which disproportionately affects those outside of the UU "normative" range. Those within the UU norm were seen as women, gays/lesbians and retired white men, while outside the norm were people of color, individuals with disabilities, lower education/income, family responsibilities, different working or thinking styles and theological bents, and those that have income dependent on billable hours. Those in the "out" group were seen as less likely to "fit" committee criteria. Youth were developing recognition as valuable resources; however, they are often limited in their committee participation due to work, school and financial constraints.

2. **A focus on filling vacancies "successfully" and the dearth of people of color applicants overtakes AO/AR/MC as a critical lens informing committee nominations.** Committee members consistently described their work as intense and often exhausting. As a result, the AO/AR/MC vantage point becomes lost in the lack of people of color candidates and the sheer volume of work filling the available slots. One member commented that some candidates get only "one strike, not three," and that "failure" by a person of color was unfairly generalized to all members of that race or even to all people of color. When people of color are identified as suitable referrals for committee work, they risk being over-used and are primarily categorized by their race, as opposed to the skills and gifts they bring.

3. **The referent of AO/AR/MC as it is understood in most discussions, is limited**

to people of color and even then, primarily refers to African Americans. This UUA dilemma reflects the broader society. The prevailing view is that Board and committee leadership by people of color who bring their "lived experience" as evidence of AO/AR/MC awareness, is necessary to promote diversity by visible example. Some people of color said positions should not be designated specifically for people of color, and that white allies who have developed AO/AR/MC competence could fill these positions. Moreover, they said these allies might be more effective in promoting diversity because they represent the majority identity. The term "multiculturalism" was seldom used in the responses of interviewees.

In addition to identifying common threads and notable individual comments, Dr. Gore posed several worthwhile questions that arose in analyzing the interviews

1. How can the Journey Toward Wholeness Transformation Committee encourage UUA Committee leaders to expand their understanding of AO/AR/MC and diversity most effectively?

2. How can the Journey Toward Wholeness Transformation Committee contribute to reducing the fear of failure by Committee on Committees and Nominating Committee leaders, as well as on the part of diverse candidates who may be unable to imagine themselves as valued leaders in the current structure or unwilling to take on the dual burdens of committee work and representing their identity group?

3. How can the Journey Toward Wholeness Transformation Committee impact the "leadership pipeline" to support the UUA's commitment to be an AO/AR/MC institution?

While these questions were answered to greater and lesser degrees in the overall study results, a number of additional questions and issues were raised at during the course of data analysis. To begin exploring them, the Journey Toward Wholeness Transformation Committee extended its contract with Dr. Gore, requesting that she flesh out certain details to give a more complete understanding of committee members' lived experiences.

Pre- and Post-Interviews

Prior to the telephone interviews and on-line survey, the Journey Toward Wholeness Transformation Committee invited members of the Nominating Committee into an informal conversation regarding their experiences with the nominating process as viewed through an anti-oppression, anti-racism, multicultural lens. The Journey Toward Wholeness Transformation Committee also posed a set of questions to UUA Moderator Gini Courter, and she met with the committee to offer her impressions of the roles and responsibilities of the Committees on Committees relative to the UUA's Journey Toward Wholeness.

Subsequent to telephone interviews conducted by Dr. Gore, Journey Toward Wholeness Transformation Committee subcommittees held follow-up phone meetings with the Committee on Committees chair, Nancy Bartlett, and Nominating Committee Chair, KokHeong McNaughton. These meetings focused on obtaining more detailed information regarding the themes of this study: specifically, an Anti-Racist/Anti-

Oppressive/Multicultural perspective of recruitment and selection; awareness, training and internal processes; and orientation, support, and retention.

Summary

The information generated by these research tools was both enlightening and informative. It helped to clarify a number of issues at various levels of the Association that may influence successful efforts to build diverse and inclusive leadership positions. It also confirmed the crucial need for committee chairs who are dedicated to the process of identifying and soliciting candidates from an Anti-Racism/Anti-Oppression/Multiculturalism perspective. For the Journey Toward Wholeness Transformation Committee and others involved in this journey, the results of this Snapshot assessment provide compelling reasons why Anti-Oppression/Anti-Racism/Multicultural analysis must be fundamental to leadership development throughout our Association.

Limits of the Study

The members of the JTWC are acutely aware that the information gathered from members of the Committee on Committees and the Nominating Committee does not fully or completely reflect the array of talent and understanding held by the members of those bodies.

Further, members of the Journey Toward Wholeness Transformation Committee are acutely aware that we have important gaps in our understanding of the challenges faced by members of the committees with whom we engaged.

Our findings also indicate varying levels of awareness by members we spoke with due to length of tenure.

Given these considerations we have identified the following study limitations:

1. The Journey Toward Wholeness Transformation Committee first developed the phone interview questions, then refined them in collaboration with Dr. Susan Gore. We then created the online survey tool. After compiling the survey data, we identified what we thought were crucial elements of the study—which we decided to examine in greater depth. Additionally, during the research analysis, several questions were raised that we had not asked during the original data collection processes. These questions became the "study elements" cited previously. Answering these questions required Journey Toward Wholeness Transformation Committee members to develop additional ways to gather the needed information. Some questions still remain; for example: who is responsible for providing orientation of new committee members and in what detail? Moreover, who is responsible for tracking and follow up (exit interviews/surveys) with members who do not complete their terms?

2. While we identified 301 people who had served on Association committees in the past five years, the email addresses for 57 of them were invalid, leaving a potential pool of 244 respondents. More than half of the potential pool (131) did respond. The usual response rate on most surveys is 1 out of 6. However, people who identified as having marginalized identities responded at a rate of almost 100%. When examining the survey results, readers might keep in mind that these response rates may skew the data somewhat. Even so, the Journey Toward Wholeness Transformation Committee recommends that these respondents dbe given due attention and weight. The high response rate of those who identified as historically marginalized might be attributed to the dearth of opportunities for these individuals to voice their perceptions on Anti-Racism/Anti-Oppression/Multiculturalism as it relates to volunteer leadership positions in the Association. Once given the opportunity, those respondents may have enthusiastically seized the chance to comment. Additionally, because these individuals are frequently in the minority in their committee positions and are few in number, they may not feel comfortable voicing these opinions within their committees or in other Association service environments.

3. The on-line survey question designed to solicit historically marginalized

identities necessarily forced people into boxes that did not fit their lived experiences. Gathering statistical information requires establishing clear categories; it became evident to us that age and gender identity were particularly problematic for respondents. The form requested that survey participants fill in blanks regarding age and gender identity (rather than checking predetermined boxes), but did not list them as historically marginalized identities. This led to confusion and frustration for the respondents, as evidenced by comments from the survey. Respondents also had trouble in answering subsequent questions when they had marked multiple identities.

4. Ideas gleaned from the phone interviews and survey comments and highlighted in the report were, by their very nature, subjective. It is difficult to extrapolate or make generalized conclusions based on these individual comments. Still, the Journey Toward Wholeness Transformation Committee determined that certain individual comments were worth lifting up, particularly when more than one person expressed the same opinion or raised the same issue or concern.

5. The following question was asked at the conclusion of the phone survey interviews: "Is there anything else that you wanted us to know?" We received many meaningful responses to this question, some of which raised additional questions. Unfortunately, we were unable to follow up on the issues raised by those comments in this study. Given the time and capacity to do so, the study might have been different.

6. Sometimes when data was not readily available or accessible, an obvious, but perhaps erroneous, conclusion was to assume that it did not exist. Certain documents or information might have existed, but for whatever reason, the Journey Toward Wholeness Transformation Committee did not think to make the request, and the information was not readily offered. For example, we received orientation manuals from one committee somewhat late in the process, but we did not know whether other committees had them.

7. This study did not interview committee appointees or elected members to find out their perceptions of the processes and practices related to Anti-Racism/Anti-Oppression/Multiculturalism as applied to recruitment, orientation, support, training, etc. This line of inquiry might provide the subject matter of a future study.

8. In this study, the Journey Toward Wholeness Transformation Committee cited the 1997 General Assembly Resolution on "Accessibility for Persons with Disabilities," and fully recognizes differing abilities as an area of diversity subject to oppression and marginalization. However, we regret that the scope of this study did not focus on accessibilities issues within the context of Anti-Racism/Anti-Oppression/Multiculturalism in volunteer leadership positions. The Association and accessibility concerns are viewed by the Journey Toward Wholeness Transformation Committee as worthy of a focused and separate assessment that may be conducted in the future.

Analysis: Recruitment and Selection

Introduction

<center>ଡ଼ଔଷ</center>

<center>
Let us be artisans of hope, artisans of wonder, working with the clay of
human longing, of our capacities for greed and indifference, exclusion and
fear, as well as for generosity, courage, forgiveness and resilience.
Let us build flourishing communities of honesty, inclusion, self-critique and hope.
~ Rev. Dr. Sharon Welch
"A People So Bold: Theology and Ministry for Unitarian Universalist"
</center>

<center>ଡ଼ଔଷ</center>

In our journey toward the flourishing communities described by Sharon Welch, no task is more important than the nurturing and selection of those who will lead the way. If we are to be artisans of an inclusive community, then our lead builders must themselves reflect that inclusivity through representation and cultural competency. This call is not new in our theology and some might argue it lies at its core—birthed from our Universalist roots. Paul Rasor says, "Universalist theology refused to divide the world into factions or to exclude anyone from its vision. It said we're all in this together, and wherever we are headed, we will all share in it."

The following assessment looks at the Nominating Committee's and Committee on Committee's recruitment and selection processes for leadership through an anti-racism, anti-oppression, multicultural and theological lens, reviewing and analyzing their effect on our journey.

Observations and Findings

Recruitment and selection research/data was gathered utilizing a series of telephone interviews conducted by Dr. Susan Gore, as well as follow-up conversations by members of the Journey Toward Wholeness Transformation Committee with Gini Courtier, Nancy Bartlett, and KokHeong McNaughton. In addition, an online survey of elected and appointed committee members was administered on Survey Monkey.

Recruitment

Several interviewees commented to Dr. Gore that the recruitment of diverse candidates was limited to people of color, and that little or no effort was made to recruit candidates who were marginalized on the basis of class, sexual orientation, ability/disability, etc.

In the spring and summer, the Committee on Committees invites applications for open positions on Board-appointed Committees in the *UU World* magazine, the UUA website, and other appropriate venues. Applications are completed on-line and filed electronically. In September, the Committee on Committees reviews the applications for each position and begins the process of checking references and choosing candidates. As reported in interviews conducted by Dr. Susan Gore, if the open application process fails to create a sufficient and diverse pool, Committee on Committees members access established networks and ask for recommendations. The Nominating Committee's process of inviting

applications is very similar to the Committee on Committees' process, but happens every two years. In the past, the Nominating Committee has hosted a luncheon for potential leaders, but according to committee member, this has rarely led to nominations.

One elected leader wrote, "Having few leaders in our movement who are from historically marginalized groups usually stretches a small pool. This impacts the leaders, the leadership, and the work. If the right leader or representative from a historically marginalized group does not emerge, I suggest bringing on a leader who understands the work at hand plus focusing on leadership development and mentorship for all leaders in areas of Anti-Racism/Anti-Oppression/Multiculturalism."

Selection

Between January 1, 2008, and December 31, 2009, the Board appointed 66 individuals to fill positions on Board-appointed committees, based on the recommendation of the Committee on Committees,. Of the 66 appointees, 38 were women, 25 were men and three did not identify their gender on their applications. Of the same 66 appointees, 11 identified themselves as African American, Asian, Latino/Latina, LGBT and/or people with disabilities. (Appendix C)

The Nominating Committee's slate for the 2008/2009 cycle resulted in the election of 19 candidates. These 19 candidates included two African Americans, five LGBT community members, and four young adults.

In the previous application cycles for both committees, application forms had not contained an appropriate space for candidates to disclose often-marginalized identities. An applicant stated, "One could have guessed [my identity] from my involvement with certain groups but I was very uncomfortable mentioning that in a letter which could come across as 'pick me' because of my often-marginalized identity. A standard form with an area to check those aspects of one's self would have been better."

Among candidates selected in the last two years who claimed a single marginalized identity, over 80% said their identity was known to the selecting committee as compared to less than 50% of those selected more than 10 years ago. [Appendix B, Chart 6]

Another appointed leader stated, "I do believe [my being a] young adult was a factor in my appointment and was viewed as an asset, potentially tokenizing."

An elected individual said, "I felt that one nominee to my committee was selected only for identity, not interest or skill. But a couple of other nominations seemed to miss opportunities to look for more diverse identities or deeper cultural competencies."

Based on responses to the on-line survey, those respondents with historically marginalized identities generally felt that their identity was viewed as an asset; in only two cases did respondents believe their selection was a tokenization of their identity. [Appendix B, Chart 4] And although those two people said their selection was a tokenization, they also believed their identity was viewed as an asset.

A member of the former Accessibilities Committee commented, "[A] major contributor to the effectiveness of the committee was the presence of people who were members of the marginalized group *and* allies to that community."

Another appointee observed, "When religious professionals are in trouble, it's important

to have a range of experiences and backgrounds [among members of the Board of Review.]"

An appointed committee member said, "The Committee on Committees has worked to provide us with as much diversity as possible."

Interviewees from the Nominating Committee and the Committee on Committees indicated that the people of color are often selected for multiple positions and tend to burn out. Also, several interviewees mentioned that they experience a dilemma when determining how much weight should be given to candidates' marginalized identities, especially compared with other professional or technical expertise required by the committee position.

A member of the Nominating Committee said, "People being nominated or appointed for service to the Association at this level should be able to demonstrate cultural competencies. I also believe this standard should apply across the board."

Both committees ask prospective candidates to report training and experience related to anti-oppression, antiracism and multiculturalism.

From the on-line survey we note that when respondents thought cultural competence and antiracism/anti-oppression experience was highly important, that cultural competence/experience was believed to be a positive factor in their selection more than 80% of the time. When it was of limited importance to respondents, their competence and experience was a factor only 10% of the time. [Appendix B, Chart 10]

In a 2008 conversation between the Nominating Committee and the Journey Toward Wholeness Transformation Committee, members of the Nominating Committee acknowledged the importance of cultural competence and a commitment to anti-oppression, antiracism work–both within their own committee and in applicants for nominated positions. Members stated that while they do sometimes rely on candidates listing the trainings they have attended, they prefer a narrative describing what candidates felt they had learned as an indicator of competence.

Also in 2008, the Moderator of the UUA gave a presentation to the Journey Toward Wholeness Transformation Committee; in it, she explained that the Committee on Committees considers cultural competence to be the goal for all appointees, but different committees require differing levels of competence. The Committee on Committees went so far as to assign committees to one of four levels of competence being required for appointees. The Journey Toward Wholeness Transformation Committee, Ministerial Fellowship Committee and Nominating Committee were placed in the most rigorous category. In a conversation following the luncheon for UUA committee chairs, jointly hosted by the Nominating Committee and Committee on Committees, the chairs of the hosting committees acknowledged the importance of cultural competence and the difficulty of assessing its presence in an individual candidate.

Analysis

Recruitment

The Nominating Committee has developed a recruitment practice that has yielded qualified candidates in the past: the committee assigns member liaisons between the

Nominating Committee and affinity/advocacy groups, district leadership, and staff.

The current recruitment methodology leads to a pool of candidates that is qualified to serve, but which tends to be too small and underrepresentative of the potential diversity of leadership within the Association.

In a subsequent interview with the Journey Toward Wholeness Transformation Committee selection and recruitment subcommittee, Nancy Bartlett, Committee on Committees Chair, explained that the Committee on Committees recently went to a paperless application process without developing a paperless system for handling the process. One of Nancy's goals is to streamline the system, including the development of an online pool of potential candidates.

Selection

The Journey Toward Wholeness Transformation Committee opted to look at appointment and nomination statistics from the past five years, rather than attempting to measure progress by setting numerical targets or goals based on the demographics of our congregations. One indicator of progress is the degree to which various forms of diversity within leadership convey that the Association is open and welcoming to all. It is obvious from the data obtained that both committees are actively concerned about making leadership more diverse and inclusive. Both committees have made noteworthy achievement during the past five years, including efforts to welcome racial and ethnic diversity. Hopefully, the same sense of welcome and openness expands to all forms of diversity.

The consensus of the Nominating Committee and Committee on Committees interviewees was that there is a need for diversity on appointed and elected committees, and that a very real effort is made to select candidates with diverse backgrounds. Yet it is important to continue to be aware that race and ethnicity is more than Black and White, and that diversity is more than race and ethnicity.

While diversity of candidates is an important goal of the selection committees, there is another goal that is equally important to our move toward wholeness: increasing the cultural competence of all candidates. It is impossible for the wide range of identities that exist in our congregations to be represented on every committee, much less in any one leadership position—and so cultural competence becomes crucial.

Unlike diversity, the degree and breadth of the continuum of cultural competence possessed by candidates is more difficult to measure and quantify, and no consistent use of formal metrics is in place to determine whether candidates meet certain baseline thresholds.

Recommendations

The Nominating Committee and the Committee on Committees might:
1. Consider jointly developing metrics for measuring the cultural competence of individuals, not only with racial and ethnic identity, but all identities for which people have been historically marginalized.

2. Continue their practice of identifying cost-effective methods of recruitment.

3. Continue their practices of self-education and keep the broadest and most inclusive

definition of diversity before them.

4. Consider jointly developing and maintaining a system to track current and past committee members, including previous applicants and those who were recruited but never applied. (Note: the Nominating Committee may choose for reason of confidentiality to not retain information regarding previous applicants.)

    a. The system should track demographic information and assessment of cultural competence by some standardized metrics.
    b. Committees should continue the practice of using checkboxes for potential candidates to claim identities.
    c. Historical information should include committees served, chair-ship and dates of service.
    d. The system should be private, but readily accessible by all current Committee on Committees and Nominating Committee members.

5. Consider developing a system of soliciting and recruiting potential candidates from district and congregational leadership as well as names of affinity/advocacy groups. This can be accomplished by creating a systematic communication system with districts and congregations when vacancies occur.

6. Consider jointly developing a database of potential candidates from those who are recommended, have received leadership and Anti-Racism/Anti-Oppression/Multiculturalism training and have been successful volunteer leaders.

7. Consider demographic information, including marginalized identities, in a database of potential candidates.

8. Consider developing leadership training in districts and throughout the UUA,
    a. which could include Anti-Racism/Anti-Oppression/Multiculturalism training in order to increase competencies and skills and to develop a pool of potential candidates.

The Nominating Committee might:

9. Continue its practice of liaison assignments and consider extending their scope to include all affinity/advocacy groups (for example, Equual Access and TRUUST (Appendix E)).

Analysis: Anti-Racism/Anti-Oppression/Multiculturalism Awareness, Training, and Internal Processes

<center>ༀ</center>

The central task of the religious community is to unveil the bonds that
bind each to all. There is a connectedness, a relationship discovered
amid the particulars of our own lives, and the lives of others.
Once felt, it inspires us to act for justice.
~ Rev. Dr. Mark Morrison-Reed
"The Task of the Religious Community" Singing the Living Tradition

<center>ༀ</center>

Introduction

Key to our effectiveness in leadership development and remaining faithful to our commitment to Anti-Racism/Anti-Oppression/Multiculturalism is the commitment we make to each other in our work. What we create together, in relationship with one another, is a work in progress. The results of that work are realized in our individual transformations and the use of our collective power. By bringing a consistent Anti-Racism/Anti-Oppression/Multiculturalism lens to our development and to our group processes, we add integrity to our specific tasks and help strengthen our institutional commitment.

An indicator of personal and institutional commitment to Anti-Racism/Anti-Oppression/Multiculturalism is the multicultural life experience we bring, our willingness to engage in intentional learning to augment that life journey, and the skill with which we reflect and finally apply that learning. This "will" and "skill" commitment to leadership is an inside-out metamorphosis that begins with Anti-Racism/Anti-Oppression/Multiculturalism awareness and can be supported in that focus by training around Anti-Racism/Anti-Oppression/Multiculturalism and attention to group processes.

Observations and Findings

Awareness

In learning about the Anti-Oppression/Anti-Racism/Multi-Culturalism awareness of members on the Nominating Committee and Committee on Committees, we are reminded by Rev. David Baumbaugh that this process is a "creative, evolving, renewing, redeeming process which brings us into being, which sustains us in being, and which transforms our being." Awareness of Anti-Oppression/Anti-Racism/Multi-Culturalism differs considerably based on the social location of each person and her or his own experience. When asked about these experiences, there were vastly different stories from members of the Committee on Committees and the Nominating Committee, just as though there would be from any congregation.

Some committee members have been involved with Anti-Oppression/Anti-Racism work

since childhood and youth movements—from the 1940s through the present. Some members have continued their involvement and learning while others have admitted that they have engaged in intentional learning very little since their earlier activist days. Other members came to this work through their adult years, either outside of Unitarian Universalism or within our movement. Consistently, members of both committees demonstrated awareness of Anti-Oppression/Anti-Racism/Multiculturalism through the lens of their own lives; in addition, many referred to the impact of institutional trainings on their work. As one member expressed, "Our faith calls us to Anti-Oppression/Anti-Racism/ work because we are committed to lifting up the inherent worth and dignity of all people and the interconnectedness which makes us whole. This theological commitment is a work in progress. The lived experience of leaders reflects this faithful effort."

At a 2008 meeting with the Journey Toward Wholeness Transformation Committee, UUA Board Moderator Gini Courter shared the Board of Trustees' analysis of Anti-Racism/Anti-Oppression/Multiculturalism awareness in the committees of the Association. This model characterizes awareness at four different levels: unconscious incompetent (personal awareness), conscious incompetent (learning systematic awareness), conscious competent (changing self), and unconscious competent (changing institutions) (Appendix E). It is the Board's basic assumption that 1. no one should serve on a UUA committee who is unconsciously incompetent in the area of racism and oppression; and 2. there are committees which require members to have reasonable competence in the area of racism and oppression in order to not do harm. The Board expects all Board members to be at least a level 3 (conscious competent), except for those serving as Chair of the Committee on Committees. The Moderator also informed the group that the Board expects the Nominating Committee and the Journey Toward Wholeness Transformation Committee to operate at the fourth level of awareness (unconscious competent).

Training

Participating in Anti-Racism/Anti-Oppression/Multiculturalism trainings within a Unitarian Universalist context has not always been easy, either for white people or people of color. Moving from a focus on personal awareness around these issues to discussion of the institutional underpinnings of oppression has, unsurprisingly, caused our faith communities a certain amount of conflict and growing pains. The Association evolved in its Anti-Racism/Anti-Oppression/Multiculturalism focus using various training models. As a result, there have been signs of institutional identity shifts. Dr. Rebecca Parker, president of Starr King School for the Ministry, noted, "Starr King has helped educate people for ministry who are now in leadership around Journey Toward Wholeness and anti-racism work, and I do need to say that we have been emphasizing the intersection of oppressions."[8]

More recent models such as the UUA congregational curriculum, "Building the World We Dream About," are framed around a transformative approach of exploring how we

---

[8] *The Arc of the Universe is Long: Unitarian Universalists, Anti-Racism and the Journey from Calgary* by Leslie Takahashi Morris, Chip Roush and Leon Spencer, 2009

see ourselves, our communities and our world through the lens of race and ethnicity—and, building on that learning, examining how one might think and act differently.[9]

Trainings like these aim for a particular goal or lesson, attempting to develop a specific set of skills, whereas increasing personal awareness is a matter of paying attention to one's own experience. Achieving cultural competence requires both training and awareness.

According to the Committee on Committees Orientation Manual for committee chairs (Appendix E), one of the requirements for service on elected Unitarian Universalist Association committees is a one-day training immediately following General Assembly every other year. This allows leaders of our faith to share a basic understanding and experience with Anti-Racism/Anti-Oppression/Multiculturalism as well as ensures that all leaders are intentional about directed learning. In online survey comments, one Committee on Committees member wrote that he was informed about anti-racism and anti-oppression work by workshops as well as personal experience. He feels that the Committee on Committees "must ensure basic training for every committee member."

Members of the Nominating Committee have suggested that there could be more training at various levels of the Association (national, regional, district, congregational), as well as more funding to make these trainings accessible to all. Those members were also clear that recent years have seen an increase in funding and removal of barriers, and that our faith is the better for that commitment. Members of the Committee on Committees noted that attendance at the post-General Assembly training was a serious obligation that they required of all appointees. One Committee on Committees member confirmed that, although Committee on Committees members engage in continuing education along with the rest of the Board of Trustees, they do not receive advanced training in Anti-Racism/Anti-Oppression/Multiculturalism specific to their role on the Committee.

Unfortunately, due to its placement immediately following General Assembly, the training did not receive the enthusiasm it might have under different circumstances; and many appointed and elected committee members reported feeling "exhausted by GA." Yet it was judged by most to be a worthwhile training. Many also said that the training varied very little from one year to another and "maybe a wider conversation would be helpful."

Internal Processes

One way that the Nominating Committee demonstrates leadership in and commitment to Anti-Oppression/Anti-Racism/Multiculturalism is that members are liaisons to districts and to member organizations to which they are accountable, such as Diverse and Revolutionary Unitarian Universalist Multicultural Ministries (DRUUMM), Allies for Racial Equity (ARE), Youth, Young Adults, and other communities.

The Nominating Committee has also commented that they include a process observation as part of their meetings and discernment process, a tool that the Journey Toward Wholeness Transformation Committee also uses regularly and recommends as a way of giving and receiving internal feedback.

---

[9] Building the World We Dream About: A "Welcoming Congregation" Curriculum on Race and Ethnicity" by Mark A. Hicks, Ed.D., June 2007

The Committee on Committees, by virtue of being a part of the UUA Board of Trustees, uses the four levels of awareness of Anti-Racism/Anti-Oppression/Multiculturalism (Appendix E) to gauge the need for members of certain committees to have differing levels of cultural competency. This serves as a marker for how they can decide where different leaders fit into the whole.

However, members of the Committee on Committees have also experienced that their procedures are focused on the "nuts and bolts" of their tasks—namely, recommending candidates for open positions—and that "Anti-Racism/Anti-Oppression/Multiculturalism-consciousness can often go out the door as the board gets so busy in the details of doing tasks." Seeing the changes in how new board members talk about anti-racism, it makes one committee member think changes in our "congregations and the UUA are doing better than hoped."

Analysis

Awareness. Regarding the four stages of awareness suggested by the UUA Board of Trustees, members of the Journey Toward Wholeness Transformation Committee agree that although it may be difficult to find individual leaders in particular areas who are also committed to Anti-Oppression/Anti-Racism/Multiculturalism, all leaders of our movement should be encouraged to move beyond "unconscious incompetence" in the work of Anti-Oppression/Anti-Racism/Multiculturalism.

Members of the Nominating Committee and Committee on Committees have demonstrated a commitment to justice and awareness-building and learning best practices within their internal processes.

One question that arises out of our interviews is: how do the gatekeepers to leadership (the Nominating Committee and the Committee on Committees) hold themselves accountable for Anti-Oppression/Anti-Racism/Multiculturalism awareness and training?

Training in Anti-Oppression/Anti-Racism/Multiculturalism draws attention to the need within Unitarian Universalism for analysis that goes deeper than mere lived experience. Although we are called to share our own stories, we know that it is essential to hear and honor the cultural richness of all untold stores, especially those of people from historically marginalized identities. Particularly for people of privilege, it is not enough to engage with life and learn lessons; there is profound value in intentional trainings that deepen our knowledge and change our practice.

Regarding **internal processes**, both committees struggle to find qualified volunteers who are trusted to do the hard work of our Association; they also wrestle with the difficulty of locating applicants who are not already in leadership positions. As such, both the Nominating Committee and the Committee on Committees strive to follow an Anti-Oppression/Anti-Racism/Multiculturalism model in looking for new leaders.

Questions that arose for the Journey Toward Wholeness Transformation Committee were (1) whether any UUA committees had tracked who attended Anti-Oppression/Anti-Racism/Multiculturalism trainings, and (2) if not, then how were those leaders held

accountable, and (3) who are the explicit contacts for people with accessibilities regarding accessibility needs at UUA meetings?

Recommendations

The Nominating Committee and the Committee on Committees might:

1. Encourage members to increase their cultural competency, regardless of the committees they serve.

2. Consider working on cultural competence so that all leaders are at the fourth level of the UUA Board's suggested levels of competence.

3. Consider further evaluating the post-General Assembly training, particularly in terms of energy and expectations after the long conference. Hopefully, there can be some form of training(s) at General Assembly, at different times, in different locations, and in different media.

4. Consider jointly creating database to track attendance at post-General Assembly training.
   a. Consider linking or integrating data into with other databases.
   b. Consider tracking other AO/AR/MC training.
5. Continue to keep diligent notes and minutes, while also respecting confidentiality.
6. Continue the practice of offering a process observation, particularly with a lens of Anti-Racism/Anti-Oppression/Multi-Culturalism.

The Board of Trustees:

7. Consider assigning the responsibility for accessibility needs of committee members to staff liaison (or other responsible party as determined by administration) in order to ensure full committee participation.*

   * Though not identified in our findings and observations, the issue addressed by this recommendation arose during the committee's analysis phase.

Analysis: Orientation, Support and Retention

Introduction

<div align="center">

ೞೞ

</div>

A covenant creates right relationship through partnership without dominance or submission. It is rooted in one of the most human capacities: our talent for making promises to one another. To freely enter into a covenant creates a bond of trust. Defining and strengthening that bond of trust is the grounding work upon which all other work is built. The basis of that trust is the acknowledgment of the integrity and sovereignty of the other, and a mutual pledge to achieve together what neither can achieve alone.
~ Rev. Burton Carley
"The Way Home"

<div align="center">

ೞೞ

</div>

Covenant is at the heart of right relationship and plays a vital role in Unitarian Universalism. It is the theological call to this focus on covenant that informs our questions, observations and recommendations about what happens after we identify Association leaders. How do we, as Unitarian Universalists, create and nurture relationships between our leaders? How can we address challenges of diversity and inclusion? How do we manage conflict, particularly when issues of marginalization occur? How might we recognize who is present, who is missing and who is heading for the door? What is the impact of tending those relationships well? What is the cost of neglecting them? Our theology calls us to nurture those relationships in covenantal, accountable relationship with each other and with attention to leadership development.

In order to assess how well we cultivate those relationships in terms of leadership development, the Journey Toward Wholeness Transformation Committee looked at efforts paid to effectively orient, support and retain committee members. These three methods of engagement—orientation, support and retention—speak to our commitment to right relationship and our faithfulness to covenant.

Orientation, in this context, is the process of becoming accustomed to a new situation or set of surroundings, so that new members to a committee or board will know their roles, what to expect, and in what ways their gifts might best be utilized. Beyond information provided to the appointed/elected individuals, orientation includes attention to the new makeup of the group now that its composition has changed.

Support in this context means lending active assistance, providing information, answering questions, offering encouragement, mentoring, following up, or whatever might guarantee successful assimilation and functioning in the group.

Retention in this context addresses measures designed to identify, monitor and reintegrate potential at-risk members. Additionally, retention looks at strategies to identify instances of intentional or unintentional marginalization or exclusion. This necessarily includes attention to individuals ending their terms prematurely.

The Journey Toward Wholeness Transformation Committee offers the following observations and recommendations on two levels: the practices of the Committee on Committees and the Nominating Committee in relation to themselves (Internal Practices), and the practices of the committees in relationship to their appointees/nominees and the recipient committees and boards (External Practices).

Observations

Committee on Committees: Internal Practices

Orientation

Because the Committee on Committees is a subset of a larger group, the UUA Board, orientation occurs on two levels. As a member of the UUA Board, each individual attends the post-GA Anti-Racism/Anti-Oppression/Multiculturalism training and receives additional orientation as part of the larger group. If assigned to the Committee on Committees, that individual receives an additional orientation specific to the charge, tasks, practices and timeline for the Committee on Committees' work. One member stated, "I was handed a packet with committee charges. The first meeting was primarily to staff-up the committees. But they did some explaining because there were several new members. It's mostly a learn-as-you-go process. I think that works."

Also, as part of the orientation, attention is paid to assessing the new committee member's skills and gifts to integrate them into the existing group. While some members said that they reviewed experience and skills as a part of the process of orienting the group to new members, one reported that "members were probably not oriented to me. Several older board members noted that they never got the bios of new members. This is no way to run a railroad." This seven-member group includes an overlap of new members and old. The Committee on Committees has recently developed an orientation manual that clearly delineates expectations and timelines.

Support

Support for the Committee on Committees members occurs within the larger construct of the Board. It is there that mentoring relationships are formed, ongoing Anti-Racism/Anti-Oppression/Multiculturalism training and assessment occurs, process observation is in place as a regular practice, and a group with the specific portfolio of Anti-Racism/Anti-Oppression/Multiculturalism exists. One member noted that practical application of Anti-Racism/Anti-Oppression/Multiculturalism training can be a stumbling block, as "the issue isn't how you feel, but how the other person feels. That's what we often miss. Oh, I've been to training and we forget—for people to feel welcome the issue is, 'Are they comfortable?'" Should issues arise about Anti-Racism/Anti-Oppression/Multiculturalism at the Committee on Committees level, members are expected to address them directly within the Committee or with the committee chairperson. New members may not always feel at ease expressing their lack of Anti-Racism/Anti-Oppression/Multiculturalism dexterity, as evidenced in the following statement: "I was just dissatisfied with the depth of knowledge I had as a new member looking at these appointments and feeling comfortable we were fulfilling our obligation to diversity." If issues are reported but remain unresolved, the Moderator and the Right Relations Group of the UUA Board are venues for resolution.

෫ඟ

[We say] multiculturalism is really good as long as
we don't have to change very much—as long as I'm still in control.
~ Justine Urbikas,
Interview with Dr. Susan Gore, 2009

෫ඟ

Retention

Because Board subgroup assignments are able to sustain some fluidity in response to the needs of the Board and/or the needs of the individual, retention was not identified as a concern, or as easily measurable.

Committee on Committees: External Practices

Orientation

No formal or informal orientation occurs between the Committee on Committees and individual appointees or their recipient committees or boards; the committee's expectation is that the task of orienting new members rests with the individual chairperson(s). The Committee on Committees sends an orientation manual to incoming Committee Chairs detailing that expectation and other key information, including direction regarding process and accountability, commitment to anti-racism, anti-oppression and multiculturalism, and Openness Guidelines.

Support

An ongoing relationship between the Committee on Committees and appointees does not exist, and interaction with committee chairs is not expected unless a specific need arises. Every other year the Committee on Committees gathers information about committee functioning through a general assessment form sent to all members. The form does not specifically address Anti-Racism/Anti-Oppression/Multiculturalism concerns.

Retention

The Committee on Committees does not track retention issues but is available as a resource to the committee chairs. One member reported that "the committee itself is going to have to undergo a pretty massive organization of how we do things so we can keep track of our decisions and how our appointees work out." Another stated, "there are no direct processes [to monitor the effectiveness of placing members from diverse groups]. [We have] informal checking in with committee chairs about how the committee is running. Concerns usually come up around specific incidents, not systematic issues."

Nominating Committee: Internal Practices

Orientation

Orientation begins at General Assembly on the day following the election. The six new members are welcomed by the six remaining members at a luncheon. Introductions and general practices are shared, and dates are set for the fall meeting. The new members also attend the post-GA Anti-Racism/Anti-Oppression/Multiculturalism training. Orientation then continues at the Fall meeting with a focus on team building. The current chair noted

in a conversation with a Journey Toward Wholeness Transformation Committee subcommittee that it is her practice to have members fill out a personality inventory in preparation for the meeting and to provide electronic check-ins beforehand. The group then shares stories as part of their team building activities. Committee members also review and update their covenant, review processes, created timelines, and set expectations. A Nominating Committee member said, of the initial meeting experience, "I don't think I really understood it until our first meeting, which is mostly a "get to know you" thing. We talked about our working styles, divided the work, and had some intensive AR/AO discussions."

At these initial meetings, the Nominating Committee also works with chairs of elected committees to talk with them about what the committees need in the coming cycle. Some years, special guests are invited to meet with the committee to discuss leadership development and identification. For example, 2009/2010 included guest speakers from some UUA identity-based groups, including DRUUMM (Diverse Revolutionary Unitarian Universalist Multicultural Ministries) and ARE (Unitarian Universalist Allies for Racial Equity). The meeting was co-informative, allowing for the guests to learn more about the role of the Nominating Committee and for the Nominating Committee to learn more about the identity group. A written history of the committee does not exist, but the committee maintains a journal including some reflections by outgoing members.

When asked where the Anti-Racism/Anti-Oppression/Multiculturalism lens fits into the task of orientation, the current chair noted, "it's essential to everything we do. It's infiltrated in all of our meetings and on the forefront. Our younger adults are particularly forward with this." One member reported the following experience: "I was oriented pretty much by being tossed into the middle of the work. Plus there was a new member orientation. It was hard not to realize immediately that Anti-Oppression/Anti-Racism/ Multiculturalism was important. The orientation was still not done well."

Support

Support structures in place on the Nominating Committee include monthly electronic check-ins, strong staff support and mutual support in referring potential candidates to each other. One member spoke about current levels of support and gaps in support, "We nurtured those who didn't make the first cut, not only those selected. I wish we had better mentorship skills and experience in mentoring. We don't have time to do it except checking in with people we have been asked to follow up with. A question for the UUA and UUMA is, "Whose job is it?" A huge piece of mentoring needs to be done with everyone—leaders, seminarians, professional staff. Everyone needs to know who to call."

When the committee meets to deliberate over final nominations, their ability to support each other is thoroughly tested. The interactions during that time were described by multiple committee members as "intense." The committee practice is to reach consensus or modified consensus for each nomination. Conflict can arise, and at times, people's feelings may be hurt. When that happens, the committee practice is to halt the process and facilitate direct communication between individuals who may have engaged in a hurtful interaction. Clergy members of the committee are at times used as mediators. A return to the committee's covenant is used to remind members of the promises they made to one another. The committee includes process observation with each meeting and

rotates the role of observer, promoting personal awareness of the practice among all members.

Retention

The committee has a strong record of retention, with only a single member in recent years leaving before the completion of a term. That departure was due to an injury.

Nominating Committee: External Practices

Orientation

With the exception of offering congratulations and a welcome, once the election has taken place, there is no ongoing relationship with nominees or the committees to which the nominees were elected. The committee does carry an expectation that newly elected members will attend the post-GA Anti-Racism/Anti-Oppression/Multiculturalism training, and makes that expectation clear during the application process. Funding for that extra day is provided.

Support

Following the election, there is not an ongoing relationship of support with the individual appointees or committees and boards.

Retention

There is no formal process in place for the Nominating Committee to be notified of problems or early terminations. When an individual leaves a position, the committee might hear 'they didn't work out' but does not receive additional information. No exit interviews are currently in place.

<div align="center">୫୦ଓଷ</div>

<div align="center">

*One of the most important tools we have in our tool kit is the
strength and clarity of our commitment to become an anti-racist,
anti-oppressive multicultural faith community. We are building on years
of work with gratitude to those who have brought us thus far on our way.*
~ Orientation Manual for Chairs of UUA Committees, June 2010

</div>

<div align="center">୫୦ଓଷ</div>

Analysis

Orientation

Both groups had orientation practices that engaged their members in group process and in the tasks of the committee. Evidence of Anti-Racism/Anti-Oppression/Multiculturalism was present in the case of both groups by attendance at the post-GA Anti-Racism/Anti-Oppression/Multiculturalism training and, in the case of the Committee on Committees, through ongoing UUA Board Anti-Racism/Anti-Oppression/Multiculturalism trainings. Our Association lacks a process to ensure consistent orientation for committees and boards receiving appointees and nominees. While appointed ad nominated committee members are expected to attend the post-GA Anti-Oppression/Anti-Racism/Multiculturalism training, and committee chairs are expected to use the

Committee on Committees Manual, there seems to be limited time and resources for follow-up to ensure that best practices are communicated and observed. The bi-annual evaluation process by the Committee on Committees may be helpful in gathering more data in this area.

Support

Mentoring can be an effective support mechanism. The practice exists on the UUA Board level and thereby includes the Committee on Committees. While the Nominating Committee does not currently use mentoring, their practices of process observation and addressing conflicts and hurt feelings within their meeting time should be highlighted. In assessing the level of support offered to the committees and boards served by the Nominating Committee and Committee on Committees, we sensed a gap between the support provided and what is needed. What is unclear to us is whether filling that gap is the responsibility of the Nominating Committee, the Committee on Committees, the committee chairs themselves, or a combination of the two.

Retention

The Nominating Committee and Committee on Committees did not consider retention within their own committees an issue. No formal system of tracking retention is in place. In regard to the appointees and nominees, no exit interviews are done with outgoing members whether they are leaving prematurely or completing terms. This presents a major barrier to effectively assessing our ability to be accountable to all volunteers. The lived experiences of each of our appointees and nominees needs to be heard.

Recommendations

The Nominating Committee and the Committee on Committees might:

1. Consider creating orientation manuals for each committee so that new members will have vital information and know the procedures, goals, and responsibilities of the group. After the new member is appointed, the committee chairs would inform the member of the details of the committee operations and present their committee manuals.

2. Consider having committee chairs routinely ask new members what they will need to be successful on the committee after they provide an orientation. This intentional process would enable new members to articulate needs and could prevent misunderstanding or conflicts from the beginning.

3. Consider that, as new members come on to a committee, the dynamics of the group will naturally change.

    a. Consider a review and recommitment to their covenant to integrate all members, creating the committee anew. This could be done at the beginning of every year as well.

4. Consider having clearly selected and articulated internal mentors for new committee members and for appointed/elected committees. This will help with orientation and adjustment to the group, and can provide a support system if there are issues or

concerns. Such a mentor system may also establish allies for historically marginalized persons on the committee.

    a. Devote adequate attention to making appropriate mentor/mentee matches.

    b. Develop mentoring guidelines and issue them to all mentors.

5. Consider reviewing their own covenants in some way at each meeting, which may set the tone and establish a supportive spiritual environment.

6. Consider using process observations at meetings in order to further support the work of the committee and the members.

7. Consider conducting mid-year surveys that ask how comfortable members are in order to determine:

    a. whether they feel they are part of the team,

    b. whether they have received the information and support they needed to do the work of the committee,

    c. what they need to better function as a committee member, etc.

    d. Follow up with those that express concerns or dissatisfaction or even neutrality.

8. Consider distributing question/comment cards to members for them to raise issues with relative anonymity at the conclusion of meetings.

    a. This practice can be used to identify items that need clarification or additional discussion should a member feel uncomfortable raising an item during the meeting or prefer that the committee not spend meeting time addressing it.

    b. Follow-up privately with those members who turned in questions/comments.

    c. Consider instituting a "check-out" at the close of meetings (before chalice extinguishing) in order to allow members—especially new members—to express issues, to raise concerns, or to give positive feedback as they see fit.

9. Consider developing committee "norms" or covenantal statements that are agreed-upon by all members, and which set the tone for each meeting.

    a. These "norms" may be reviewed and revised whenever new members join the group.

    b. Examples of norms might include:

        i. We agree that silence does not mean agreement or consent and we will take steps to verify that consensus (or lack of consensus) exists.

      ii. We will ensure that equal time is allowed for check-in and/or check-out and will monitor that majority identity members stay within those boundaries, etc. (See Appendix E).

10. Consider conducting exit surveys for all members who are discontinuing service, both at the end of their tenure or before their term is complete. This information would go to the Committee chair, then to the chair of the Committee on Committees or the Nominating Committee, and then to a staff person for data entry.

11. Consider jointly developing an "exit" database, which might include exit data such as:

    a. Reason for leaving, demographics, length of service, and other indicators.

    b. Periodically the Committee on Committees and Nominating Committee would examine this database to determine patterns of success and areas to explore in order to improve committee retention.

Recommendations and Conclusions

Our hope is that the recommendations provided below will be a guide to the UUA Board of Trustees in its stewardship of our association and the Nominating Committee and Committee on Committees in their role in moving us forward on the journey, but also for the elected and appointed committees of the Association.

It is also our hope that those responsible for leadership development in our districts and congregations will also find helpful guidance in these recommendations. And lastly, we hope that those who serve in leadership at any level within our congregation will come to understand their part in moving our faith and the world further along on the journey toward wholeness.

The following table lists subject areas and the related recommendations

Recruiting and Selection	1–9
AO/AR/MC Awareness and Training, Internal Processes	10–16
Orientation, Support, Retention	17–27
Database	1, 4, 6, 26, 27
Current Practice to be Continued	2, 3, 14, 15
Practices to be Adopted by All Committees	10, 17–25

Complete Set of Recommendations

Recruitment and Selection Recommendations

The Nominating Committee and the Committee on Committees might:

1. Consider jointly developing metrics for measuring the cultural competence of individuals, not only with racial and ethnic identity, but all identities for which people have been historically marginalized.

2. Continue their practice of identifying cost-effective methods of recruitment.

3. Continue their practices of self-education and keep the broadest and most inclusive definition of diversity before them.

4. Consider jointly developing and maintaining a system to track current and past committee members, including previous applicants and those who were recruited but never applied. (Note: the Nominating Committee may choose for reason of confidentiality to not retain information regarding previous applicants.)

   a. The system should track demographic information and assessment of cultural competence by some standardized metrics.
   b. Committees should continue the practice of using checkboxes for potential candidates to claim identities.
   c. Historical information should include committees served, chair-ship and dates of service.
   d. The system should be private, but readily accessible by all current Committee on Committees and Nominating Committee members.

5. Consider developing a system of soliciting and recruiting potential candidates from

district and congregational leadership as well as names of affinity/advocacy groups. This can be accomplished by creating a systematic communication system with districts and congregations when vacancies occur.

6. Consider jointly developing a database of potential candidates from those who are recommended, have received leadership and Anti-Racism/Anti-Oppression/Multiculturalism training and have been successful volunteer leaders.

7. Consider demographic information, including marginalized identities, in a database of potential candidates.

8. Consider developing leadership training in districts and throughout the UUA,
   a. which could include Anti-Racism/Anti-Oppression/Multiculturalism training in order to increase competencies and skills and to develop a pool of potential candidates.

The Nominating Committee might:

9. Continue its practice of liaison assignments and consider extending their scope to include all affinity/advocacy groups (for example, Equual Access and TRUUST (Appendix E)).

Anti-Racism/Anti-Oppression/Multiculturalism Awareness, Training, and Internal Processes Recommendations

The Nominating Committee and the Committee on Committees might:

10. Encourage members to increase their cultural competency, regardless of the committees they serve.

11. Consider working on cultural competence so that all leaders are at the fourth level of the UUA Board's suggested levels of competence.

12. Consider further evaluating the post-General Assembly training, particularly in terms of energy and expectations after the long conference. Hopefully, there can be some form of training(s) at General Assembly, at different times, in different locations, and in different media.

13. Consider jointly creating database to track attendance at post-General Assembly training.
    a. Consider linking or integrating data into with other databases.
    b. Consider tracking other AO/AR/MC training.

14. Continue to keep diligent notes and minutes, while also respecting confidentiality.

15. Continue the practice of offering a process observation, particularly with a lens of Anti-Racism/Anti-Oppression/Multi-Culturalism.

The Board of Trustees:

16. Consider assigning the responsibility for accessibility needs of committee members to staff liaison (or other responsible party as determined by administration) in order to ensure full committee participation.*

    * Though not identified in our findings and observations, the issue addressed by this recommendation arose during the committee's analysis phase.

Orientation, Support, and Retention Recommendations

The Nominating Committee and the Committee on Committees might:

17. Consider creating orientation manuals for each committee so that new members will have vital information and know the procedures, goals, and responsibilities of the group. After the new member is appointed, the committee chairs would inform the member of the details of the committee operations and present their committee manuals.

18. Consider having committee chairs routinely ask new members what they will need to be successful on the committee after they provide an orientation. This intentional process would enable new members to articulate needs and could prevent misunderstanding or conflicts from the beginning.

19. Consider that, as new members come on to a committee, the dynamics of the group will naturally change.

    b. Consider a review and recommitment to their covenant to integrate all members, creating the committee anew. This could be done at the beginning of every year as well.

20. Consider having clearly selected and articulated internal mentors for new committee members and for appointed/elected committees. This will help with orientation and adjustment to the group, and can provide a support system if there are issues or concerns. Such a mentor system may also establish allies for historically marginalized persons on the committee.

    c. Devote adequate attention to making appropriate mentor/mentee matches.

    d. Develop mentoring guidelines and issue them to all mentors.

21. Consider reviewing their own covenants in some way at each meeting, which may set the tone and establish a supportive spiritual environment.

22. Consider using process observations at meetings in order to further support the work of the committee and the members.

23. Consider conducting mid-year surveys that ask how comfortable members are in order to determine:

  e. whether they feel they are part of the team,

  f. whether they have received the information and support they needed to do the work of the committee,

  g. what they need to better function as a committee member, etc.

  h. Follow up with those that express concerns or dissatisfaction or even neutrality.

24. Consider distributing question/comment cards to members for them to raise issues with relative anonymity at the conclusion of meetings.

  d. This practice can be used to identify items that need clarification or additional discussion should a member feel uncomfortable raising an item during the meeting or prefer that the committee not spend meeting time addressing it.

  e. Follow-up privately with those members who turned in questions/comments.

  f. Consider instituting a "check-out" at the close of meetings (before chalice extinguishing) in order to allow members—especially new members—to express issues, to raise concerns, or to give positive feedback as they see fit.

25. Consider developing committee "norms" or covenantal statements that are agreed-upon by all members, and which set the tone for each meeting.

  c. These "norms" may be reviewed and revised whenever new members join the group.

  d. Examples of norms might include:

    i. We agree that silence does not mean agreement or consent and we will take steps to verify that consensus (or lack of consensus) exists.

    ii. We will ensure that equal time is allowed for check-in and/or check-out and will monitor that majority identity members stay within those boundaries, etc. (See Appendix E).

26. Consider conducting exit surveys for all members who are discontinuing service, both at the end of their tenure or before their term is complete. This information would go to the Committee chair, then to the chair of the Committee on Committees or the Nominating Committee, and then to a staff person for data entry.

27. Consider jointly developing an "exit" database, which might include exit data such as:

  c. Reason for leaving, demographics, length of service, and other indicators.

  d. Periodically the Committee on Committees and Nominating Committee would examine this database to determine patterns of success and areas to explore in order to improve committee retention.

Conclusion

With this Snapshot Assessment, we have tried to hold up mirror to the Anti-Racism/Anti-Oppression/Multiculturalism leadership practices of our Association. We looked at the Committee on Committees and Nominating Committee with a discerning eye, but an acute awareness of their level of commitment and judicious responsibility to supply diverse members to board appointed and elected committees. We also surveyed past Association leaders on their AR/AO/MC experiences during their tenures on the committees that received those elected and appointed members. The knowledge gleaned was both insightful and enlightening. More information was gathered than we could ever distill into our analysis and resolve into recommendations. The charts that appear in Appendix B, only a fraction of which are referenced in the report, can provide revelations to Association leaders who have the time to study them.

We also assessed the areas of Recruitment and Selection by the Committee on Committees and Nominating Committee and found that while earnest efforts are being made toward seeking diverse and culturally competent candidates to fill board committee positions, the reach for potential leaders can be more intentionally expanded into districts and congregations.

In our examination of Committee on Committees and Nominating Committee AR/AO/MC awareness, training and internal processes, we discovered that a greater sense of commitment and importance is now attributed to AR/AO/MC training. However, post-GA training might be rescheduled and additional training opportunities provided. The vast majority of participating leaders had positive impressions of the workshops and expressed a need for further skill development. Increasing the cultural competence of Association leaders is essential to approaching all committee work with a multicultural perspective.

The analysis of Orientation, Support, and Retention in Committee on Committees and Nominating Committee operations, revealed clear internal procedures for orientation and mentoring support. The degree of orientation, support and follow-up of Association leaders newly assigned to committees is less clear. Making the commitment to fill committees with diverse leadership calls for providing adequate support and retention mechanisms to ensure the successful completion of their terms. Tracking members who leave prior to their term completion might yield valuable information for future retention systems.

As we continue our transformation toward wholeness, we hope this assessment leads to reflection, conversation and some thought-provoking questions. Let us join hands as we journey together.

<div align="center">

ଚ୍ଚଠା

Let's take this journey together and reach our goal; a healthy world for us, our children and our children's children, where we can flow together like a mighty river healing all of those who we touch along our banks; supporting diverse forms of life within ourselves; and returning to the source of life from which we all come. This is the beauty of the Journey Toward Wholeness

</div>

~ Rev. Om Prakash John Gilmore
Introductory message to the Joseph Priestly District, 2008

౬౦౬౩

Appendix A: Online Survey of Appointed and Elected Committee Members

The purpose of this survey is to move our Association further on the journey toward wholeness. Specifically, the Journey Toward Wholeness Transformation Committee (JTWTC) is seeking to understand how leadership recruitment, development and service is moving the Unitarian Universalist Association towards the goal of being an inclusive multicultural faith community.

You were chosen to be surveyed because you were either appointed by the Committee on Committees (CoC) or nominated by the Nominating Committee (NomCom) to serve one of our Association's Committees or Panels.

Your participation in this survey is appreciated and essential for our current report. The information gathered will help the JTWTC meet our UUA mandate to monitor and assess our association's progress toward becoming an antiracist, anti-oppressive multicultural faith community.

Privacy: Answers to the survey will be only viewed by the JTWTC. We will be publishing patterns, trends and other aggregate data, not identifying personal information.

1. Name _____

2. Committee _____

3. UUA District _____

4. Congregation size _____

5. Age _____

6. Gender _____

7. How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?
    Very important/Important/Limited importance/Not sure

8. How important does the CoC/NomCom consider cultural competency or anti-oppression / anti-racism experience to your committee's work?
    Very important/Important/Limited importance/Not sure

9. Was your cultural competency or anti-oppression / anti-racism experience a factor in your appointment/nomination?
    Yes/No/Not sure

10. How important does your committee consider cultural competency or anti-oppression / anti-racism experience to its work?
    Very important/Important/Limited importance/Not sure

11. Did you attend a post-GA training in anti-oppression—anti-racism—multiculturalism?
    Yes/no/not sure

12. How important was this to your effectiveness on your committee?
    Very important/Important/Limited importance/Not sure

13. Does your committee engage in efforts to increase the committee's cultural competence or use of an anti-oppression, anti-racism lens?
    Often/Seldom/Never

14. Do you claim any of the following often-marginalized identities?

    Working class or economically disadvantaged
    Yes/No/Decline to state

    Person of color, Latina/o, Hispanic, or multiracial
    Yes/No/Decline to state

    Person with a disability (physical; sensory; mental; intellectual)
    Yes/No/Decline to state

    Intersex or transgender
    Yes/No/Decline to state

    Gay, lesbian or bisexual
    Yes/No/Decline to state

    Other marginalized group or identity—please specify: _____

15. Were the identities you listed above known to the CoC/NomCom?
    Yes/No/Not sure

16. If known, do you believe it was a factor in your appointment/nomination?
    Yes/No/Not sure/Not applicable

17. If a factor, do you believe your identity was viewed as an asset to the committee you serve?
    Yes/No/Not sure/Not applicable

18. If a factor, do you believe your appointment/nomination was a tokenization of your identity?
    Yes/No/Not sure/Not applicable

19. Are there any impressions or reflections you wish to share with the committee or anything you think we should know?
    _____

20. May we contact you for further information should that be necessary?
    Yes/No

21. Preferred contact information: _____

Thank you for sharing your time and ideas with us. Thank you for working with us to help our Association meet its goal of being an inclusive multicultural faith community.

Appendix B: Charts/Tables and Comments from Online Survey Data

This chart offers a profile of the people who took our survey. The total for Marginalized Identity will exceed the number of respondents since people can check multiple identities.

Chart 1

Demographics of Respondents

■ Age (at selection)   ■ Gender   ■ Marginalized Identity

Category	Value
Gay, Lesbian or Bisexual	27
Person of Color	20
Working Class	19
Person with a Disability	16
Youth / Young Adult	8
Intersex or Transgender	4
Other or None	72
Female/Woman	76
Male	53
Two/Transgender	2
17-29	12
30-39	8
40-49	19
50-59	47
60-69	30
70-79	9
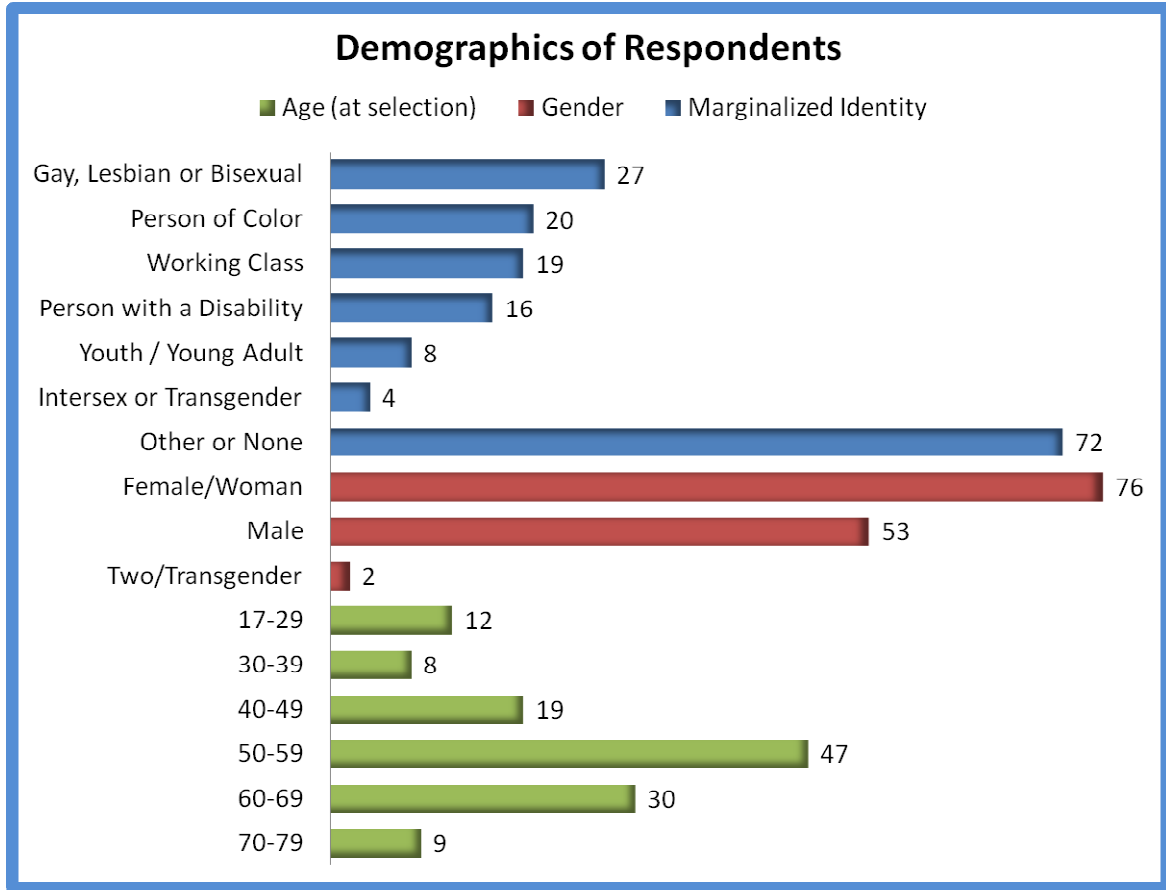
Table 1

Demographics		
Marginalized Identity	Gay, Lesbian or Bisexual	27
	Person of Color	20
	Working Class	19
	Person with a Disability	16
	Youth / Young Adult	8
	Intersex or Transgender	4
	Other or None	72
Gender	Female/Woman	76
	Male	53
	Two/Transgender	2
Age (at selection)	17-29	12
	30-39	8
	40-49	19
	50-59	47
	60-69	30
	70-79	9

This chart has the number of respondents from each committee. Some respondents serve (or served) on multiple committees, but the committee listed in the one they chose to answer for.

Chart 2

Number of Respondents by Committee

Committee	Respondents
Accessibilities Committee	1
Annual Program Fund	2
Audit Committee	2
Board of Review	7
Commission on Appraisal	11
Commission on Social Witness	2
Committee on Socially Responsible Investing	3
Compensation, Benefits and Pension Committee	1
Congregational Properties and Loan Commission	4
Elections Campaign Practices	1
Fifth Principle Task Force	2
Fund for a Just Society	1
Fund for International Unitarian Universalism	3
Fund for Unitarian Universalism	5
Fund for UU Social Responsibility	1
General Assembly Planning Committee	9
Health Plan Trust	3
Information Tech & Electronic Comm Committee	1
Investment Committee	2
Journey Toward Wholeness Transformation Comm	9
Ministerial Fellowship Committee	10
Nominating Committee	13
Openness Implementation Committee	2
Panel on Theological Education	4
Regional Sub-Committee on Candidacy	23
Religious Education Credentialing Committee	6
UU-United Nations Office	3

Table 1

Number of Respondents by Committee	
Committee Name	Count
UU-United Nations Office	3
Religious Education Credentialing Committee	6
Regional Sub-Committee on Candidacy	23
Panel on Theological Education	4
Openness Implementation Committee	2
Nominating Committee	13
Ministerial Fellowship Committee	10
Journey Toward Wholeness Transformation Committee	9
Investment Committee	2
Information Tech & Electronic Communications Committee	1
Health Plan Trust	3
General Assembly Planning Committee	9
Fund for UU Social Responsibility	1
Fund for Unitarian Universalism	5
Fund for International Unitarian Universalism	3
Fund for a Just Society	1
Fifth Principle Task Force	2
Elections Campaign Practices	1
Congregational Properties and Loan Commission	4
Compensation, Benefits and Pension Committee	1
Committee on Socially Responsible Investing	3
Commission on Social Witness	2
Commission on Appraisal	11
Board of Review	7
Audit Committee	2
Annual Program Fund	2
Accessibilities Committee	1

This chart compares how the respondent rated the importance of cultural competence and knowledge of anti-oppression, anti-racism multiculturalism awareness versus how often the committee engage in training in the area of cultural competence and anti-oppression, anti-racism multiculturalism.

Observe the correlation between importance and training. The funding panels (included the two not shown) have less frequent training that those groups that rate competency and experience at the same level of importance. In contrast, Health Plan Trust and Congregational Properties and Loan (both administrative committees), have comparable frequency of training to those groups who rate the importance of competency and experience much higher.

Committees with fewer than three respondents are not included. Converting frequency and importance to numeric values was arbitrary, but seemed reasonable given we did not ask respondents to use a numeric scale.

Chart 3
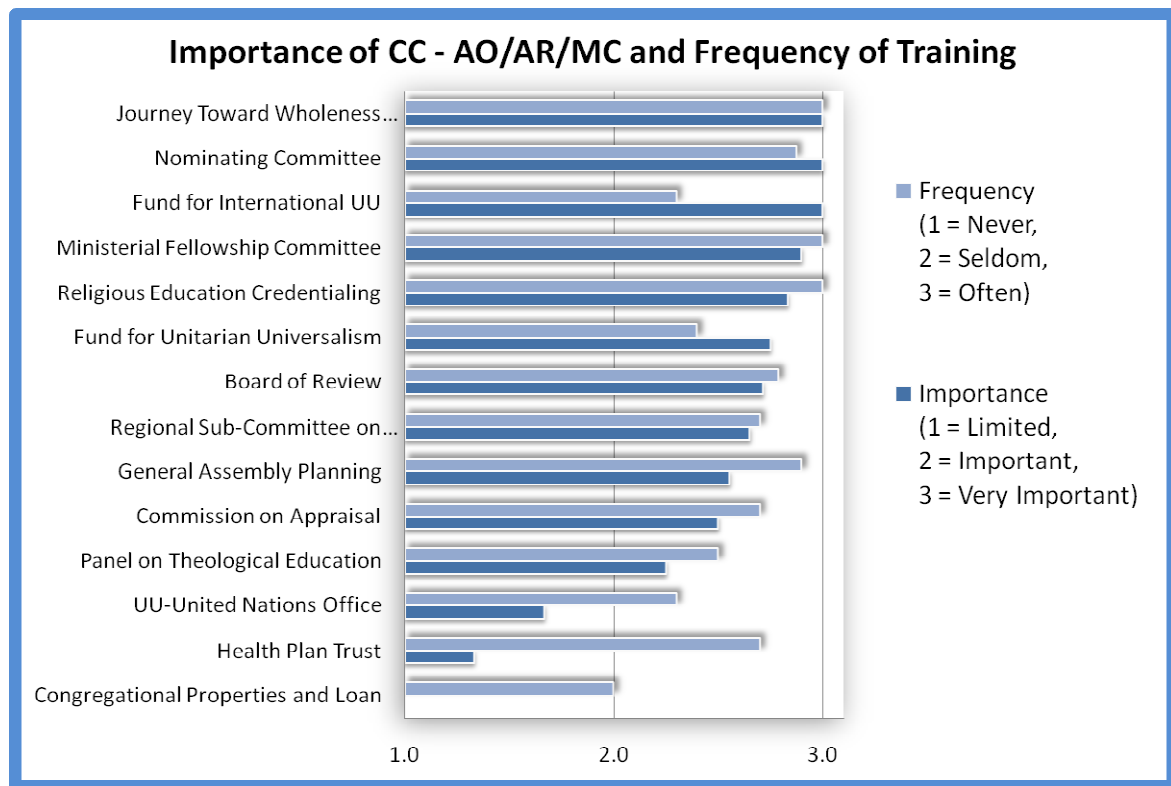
Table 3

Committee Characteristics			
Committee	Count	Importance of Cultural Competence and AO/AR/MC Experience 1 = Limited 2 = Important 3 = Very Important	Frequency of Self-Training 1 = Never 2 = Seldom 3 = Often
Accessibilities Committee	1		
Annual Program Fund	2		
Audit Committee	2		
Board of Review	7	2.7	2.8
Commission on Appraisal	11	2.5	2.7
Commission on Social Witness	2		
Compensation, Benefits and Pension	1		
Congregational Properties and Loan	4	1.0	2.0
Elections Campaign Practices	1		
Fifth Principle Task Force	2		
Fund for a Just Society	1		
Fund for International UU	3	3.0	2.3
Fund for Unitarian Universalism	4	2.8	2.4
Fund for UU Social Responsibility	1		
General Assembly Planning	9	2.6	2.9
Health Plan Trust	3	1.3	2.7
Information Technology & Electronic Communications	1		
Investment Committee	2		
Journey Toward Wholeness Transformation	9	3.0	3.0
Ministerial Fellowship Committee	10	2.9	3.0
Nominating Committee	13	3.0	2.9
Openness Implementation	2		
Panel on Theological Education	4	2.3	2.5
Regional Sub-Committee on Candidacy	23	2.7	2.7
Religious Education Credentialing	6	2.8	3.0
Socially Responsible Investing	3		
UU-United Nations Office	3	1.7	2.3

This chart shows that most respondents believe that their identity was a factor and a positive one. Overwhelmingly, a person's identity (if that of a traditionally marginalized group) is viewed as an asset whereas in only two cases did respondents believe their selection was tokenization. While it not indicated by the chart, the two people who said their selection was tokenization also believe the identity was viewed as an asset.

Chart 4
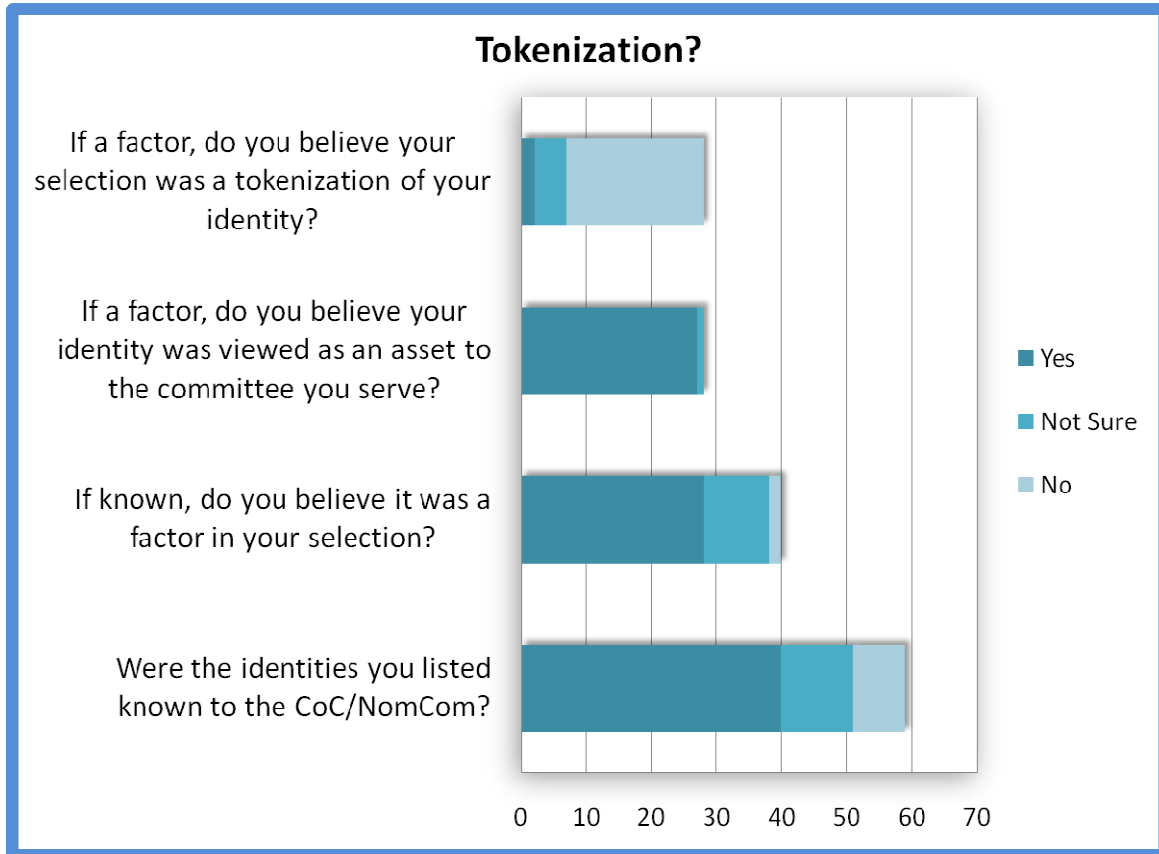
Table 2

Identity and Tokenization			
	Yes	Not Sure	No
Were the identities you listed known to the CoC/NomCom?	40	11	8
If known, do you believe it was a factor in your selection?	28	10	2
If a factor, do you believe your identity was viewed as an asset to the committee you serve?	27	1	0
If a factor, do you believe your selection was a tokenization of your identity?	2	5	21

This chart shows the number of respondents identifying as part of a single marginalized identity and further, it illustrates which identities tend to be the most hidden or invisible.

Chart 5

Respondents w/Single Marginalized Identity

Was Selection Committee aware of ID?
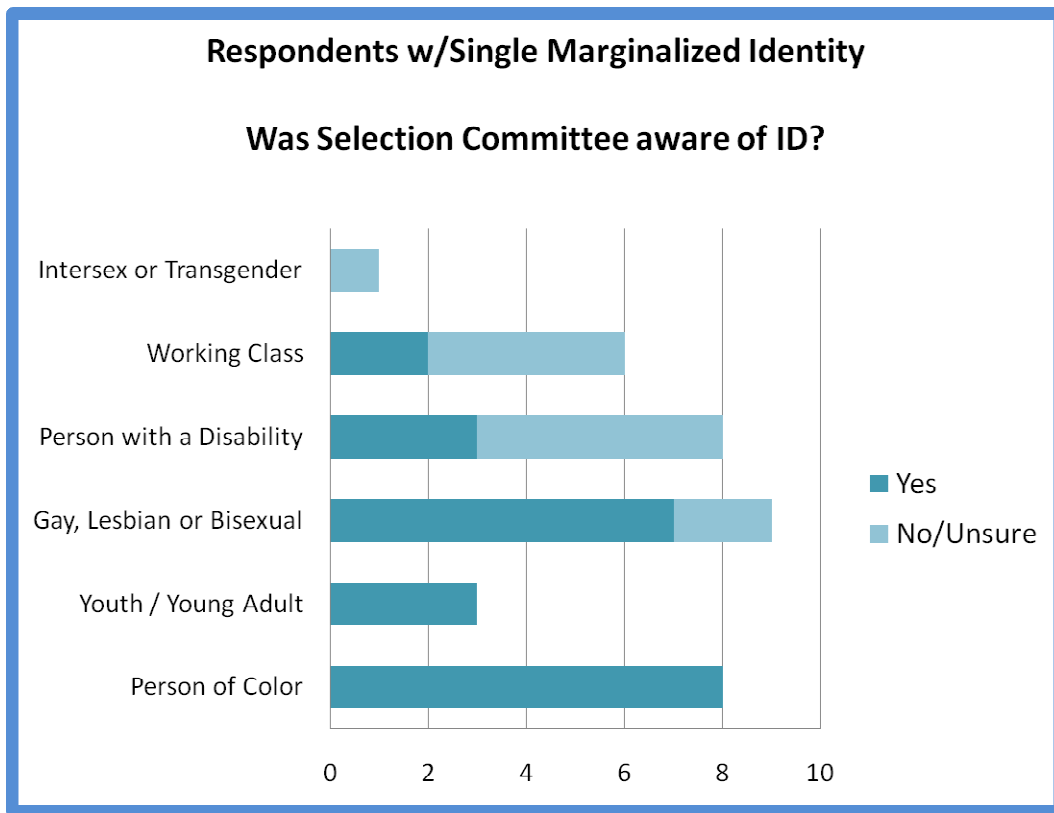
Table 3

Respondents Reporting only one Marginalized Identity		
Was selection committee aware of your identity?		
	Yes	No/ Unsure
Person of Color	8	0
Youth / Young Adult	3	0
Gay, Lesbian or Bisexual	7	2
Person with a Disability	3	5
Working Class	2	4
Intersex or Transgender	0	1

This chart illustrates that selection committee's awareness of the people's identity has increased over time. This is most like explained by the change in forms used by committees.

Chart 6

Respondents w/Single Marginalized Identity

Was Selection Committee aware of ID?

Legend:
- ■ Yes
- ■ No/Unsure

Y-axis (Year Selected): 2008-2009, 2006-2007, 2004-2005, 2002-2003, 1999-2000

X-axis: 0%, 20%, 40%, 60%, 80%, 100%
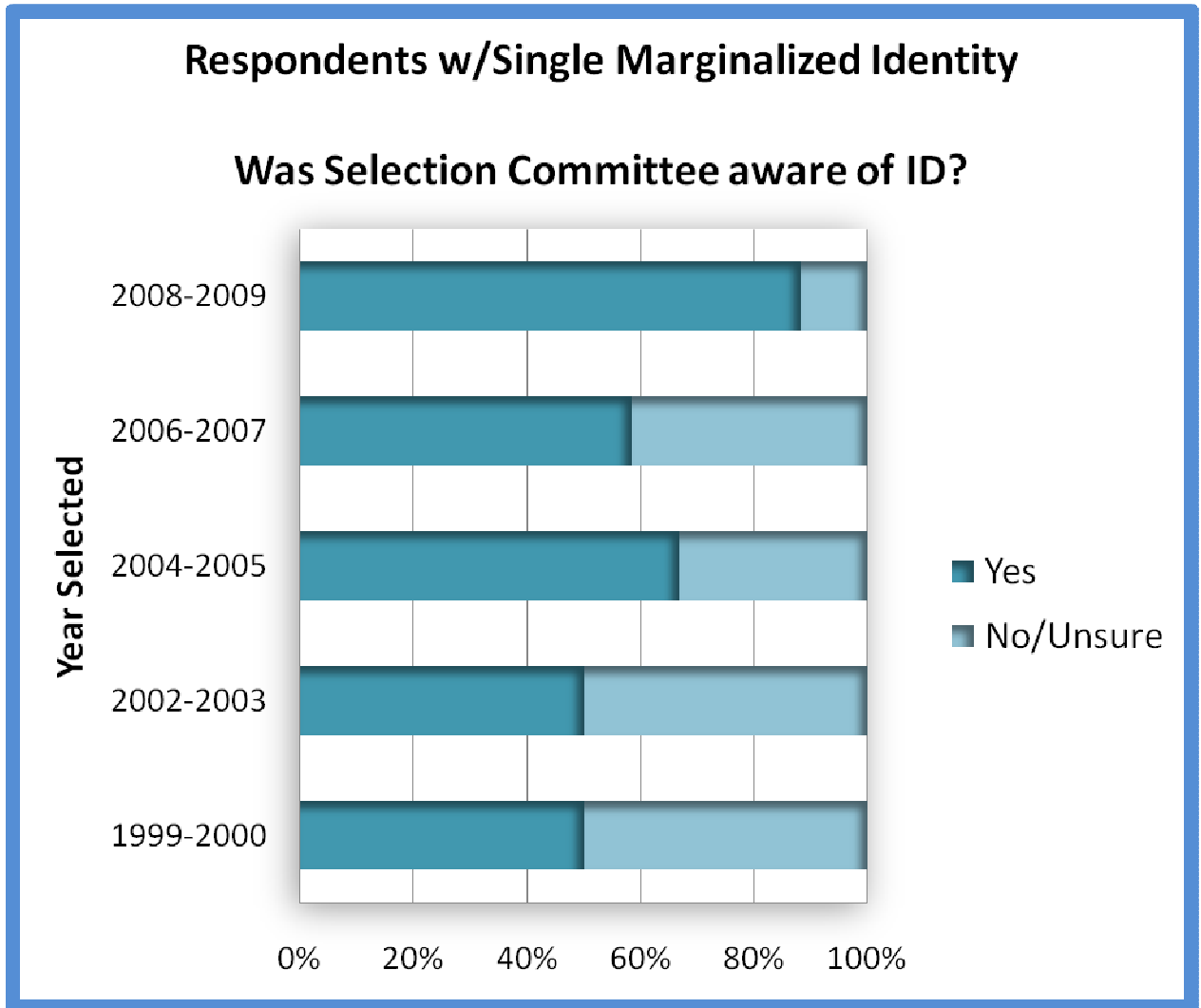
Table 4

Respondents Reporting only One Marginalized Identity		
Was selection committee aware of your identity?		
Year Selected	Yes	No/Unsure
1999-2000	3	3
2002-2003	4	4
2004-2005	10	5
2006-2007	7	5
2008-2009	15	2

This chart shows how closely aligned the assessments of the selection committee are with that of the respondents. While there are differences, there is overwhelming agreement about the perceived importance of cultural competence and Anti-Oppression/Anti-Racism/Multiculturalism experience.

Chart 7

How important does selection committee consider Cultural Competence and AO/AR/MC experience to the work of the committee you serve compared to your assessment of its importance?

- 82% — same
- 12% — less
- 6% — more

Legend: more, same, less
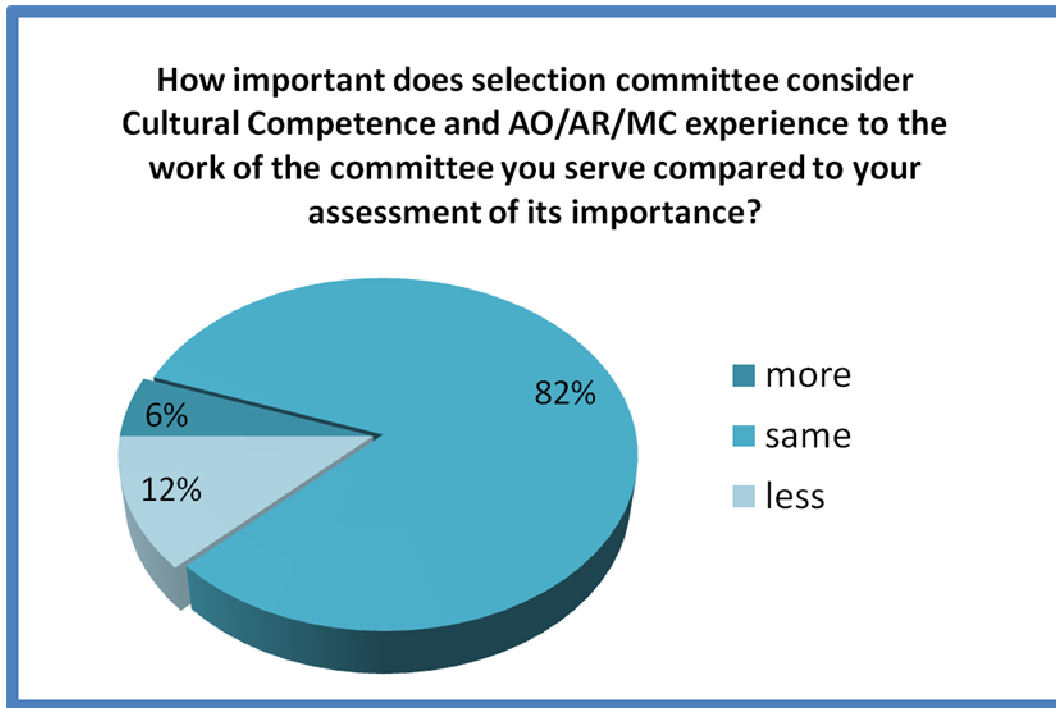
Table 5

How important does selection committee consider Cultural Competence and AO/AR/MC experience to the work of your committee compared to your assessment of its importance?	
more	5
same	74
less	11

This chart shows how closely aligned the assessments of the rest of the committee are with that of the respondent's assessment. As with the previous chart, there is overwhelming agreement about the perceived importance of cultural competence and Anti-Oppression/Anti-Racism/Multiculturalism experience.

Chart 8

How important does the committee you serve consider Cultural Competence and AO/AR/MC experience to the work of the committee you serve compared to your assessment of its importance?

- ■ more
- ■ same
- ■ less

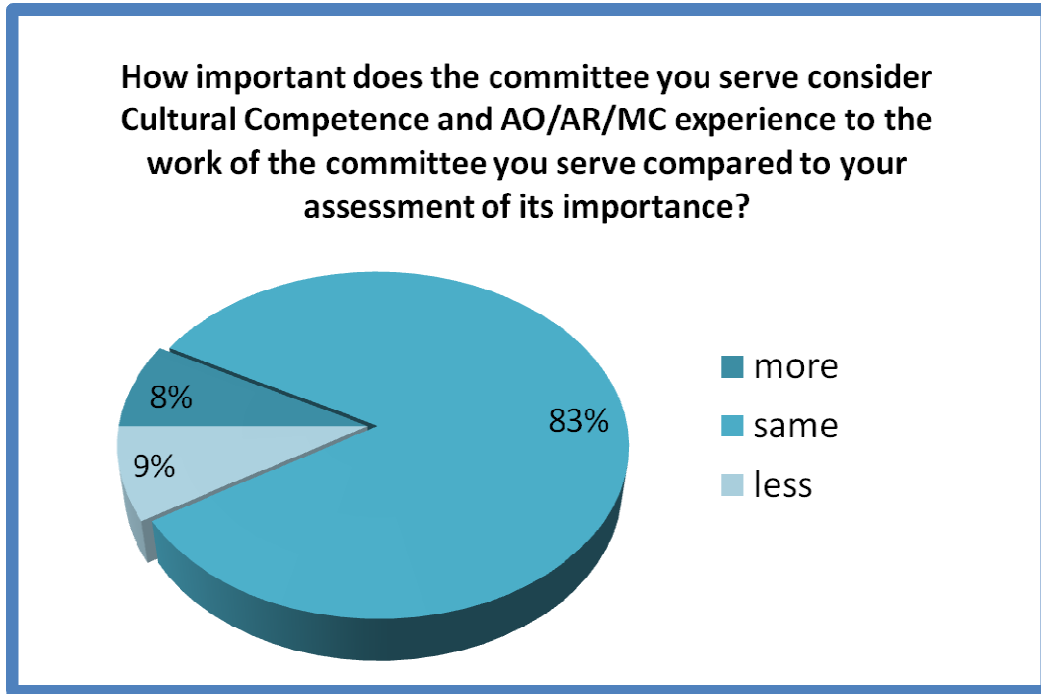8%
9%
83%

Table 9

How important does the committee you serve consider Cultural Competence and AO/AR/MC experience to the work of the committee compared to your assessment of its importance?	
more	10
same	105
less	11

This chart show how over time, the respondent's uncertainty about the importance of cultural competence and Anti-Oppression/Anti-Racism/Multiculturalism experience has declined.

Chart 6

Respondents to the question "*How important does the selection committee consider cultural competency or anti-oppression / anti-racism experience to your committee's work?*" who answered "Unsure"
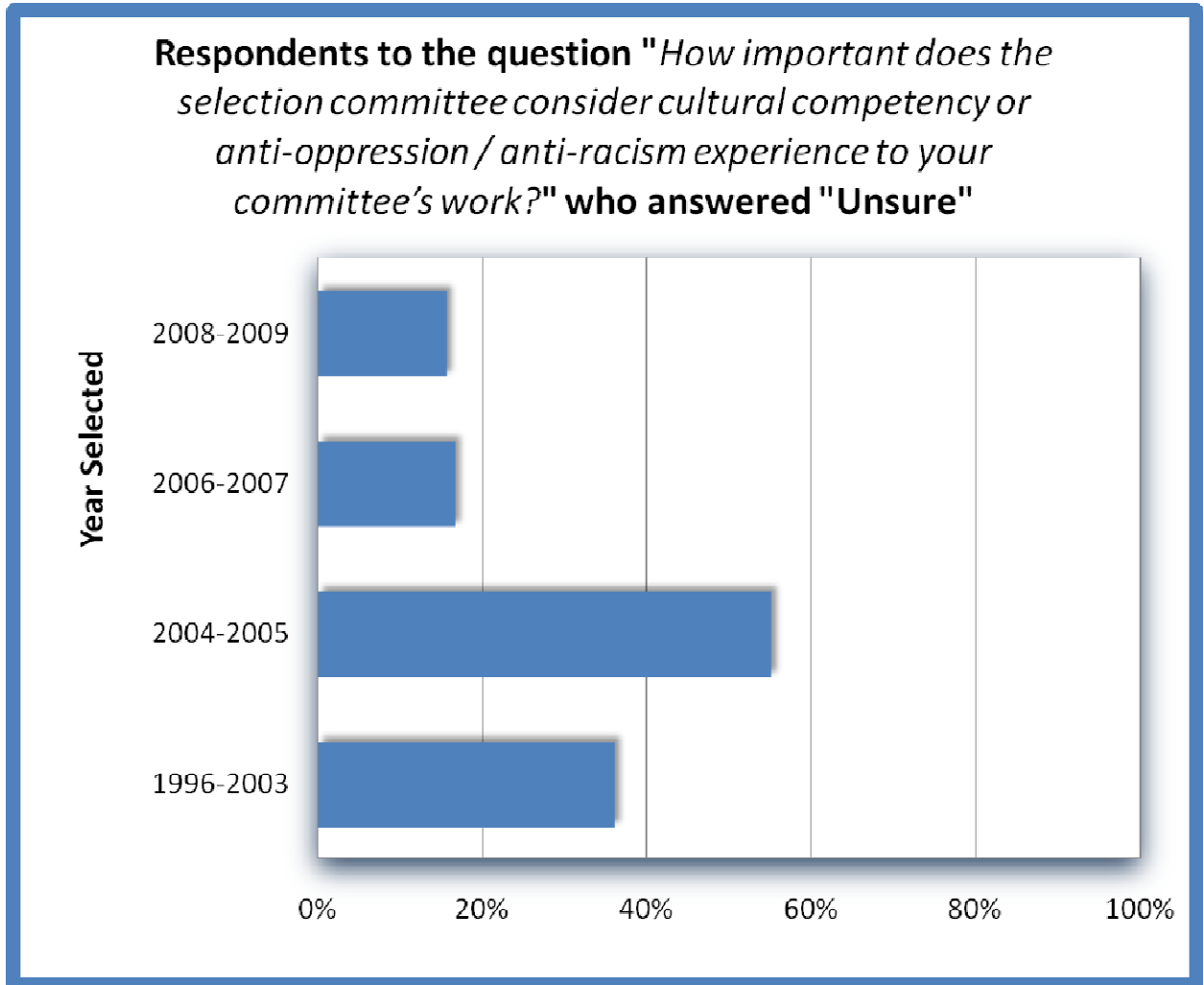
Table 10

How important does the selection committee consider cultural competency or anti-oppression / anti-racism experience to your committee's work?	
Year Selected	Unsure
1996-2003	36%
2004-2005	55%
2006-2007	17%
2008-2009	16%

This chart compares the selection of the candidate based on the candidate competence or experience with the needs of the committee for cultural competence and Anti-Oppression/Anti-Racism/Multiculturalism experience.

Chart 11

Was your cultural competency or anti-oppression / anti-racism experience a factor in your selection?

How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?

Table 7

		How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?		
		Limited Importance	Important	Very Important
Was your cultural competency or anti-oppression / anti-racism experience a factor in your selection?	Yes	1	13	42
	No	11	6	10

This chart illustrates the correlation between the perceived usefulness of the post-GA training with the perceived need for cultural competence and Anti-Oppression/Anti-Racism/Multiculturalism experience on the committee. It is not surprising that the higher the perceived need, the more useful the training would be perceived to be.

Chart 12

How important was post-GA training to your effectiveness on your committee?

Legend: Limited Importance, Important, Very Important

Values shown:
- Limited Importance: 4, 0, 1
- Important: 6, 7, 2
- Very Important: 8, 19, 10

How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?
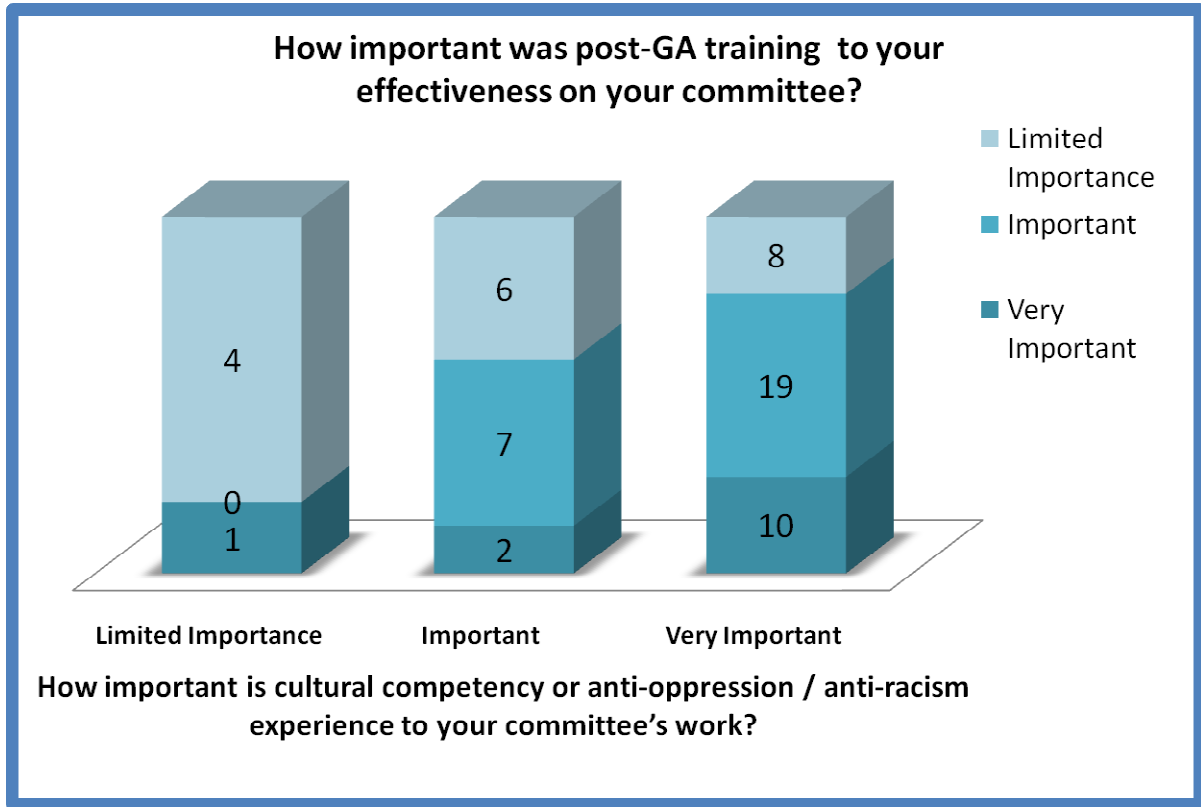
Table 8

		How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?		
		Very Important	Important	Limited Importance
How important was post-GA training to your effectiveness on your committee?	Very Important	10	2	1
	Important	19	7	0
	Limited Importance	8	6	4

This chart shows the correlation between importance of cultural competence and Anti-Oppression/Anti-Racism/Multiculturalism experience to the commitment for self-training by the committee to increase it competence and experience. Observe strong correlation between level of importance and frequency.

Chart 13

Does your committee engage in efforts to increase the committee's cultural competence or use of an anti-oppression, anti-racism lens?

How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?

Table 9

		How important is cultural competency or anti-oppression / anti-racism experience to your committee's work?		
		Limited Importance	Important	Very Important
Does your committee engage in efforts to increase the committee's cultural competence or use of an anti-oppression, anti-racism lens?	Often	1	17	70
	Seldom	10	14	11
	Never	2	3	0

Comments from On-Line Survey

One of the last questions posed on the survey was "Are there any impressions or reflections you wish to share with the committee or anything you think we should know?" Below are the answers to this open-ended question.

Note: Use of brackets [ ] indicates text removed to protect identity

AR/AO/MC work is almost nonexistent in my congregation. I feel very alone when I'm doing this work since I'm … 1 of 3 PoC. There are not enough of us to achieve a critical mass. I'm very discouraged. Others look at me like I have a one-track mind. I don't think I'm making a difference. I'm the "sour thumb" that sticks out.

Although it was not so at the time of my election, new members of the [ ] are now expected to attend the post-GA AR/AO/MC training. At our most recent meeting, we had a facilitated discussion of AR/AO/MC issues as they apply to our work.

Anti-oppression awareness is part of our covenant, both with one another on the committee, and in our interviews with aspirants. We are committed to ongoing training but with budget cuts that goal is on hold.

As a youth/young adult, I generally feel appreciated as a full member of the commission. However, partly due to the huge age gap between myself and the other members I often feel the need to process with individuals outside of the committee who share my identity or who I perceive as allies. Luckily, I have access to these people and feel supported in that way, but am not typically comfortable enough to voice all concerns with the other members of the [ ]. Also, I am largely seen as the "ar/ao/mc expert" which, I'm sure you also acknowledge as problematic. My being designated (although it's not that explicit) implies they don't have to worry about being inclusive. Things will (and I'm sure have) fallen off my radar and I can't be the only one responsible in that way. Things are getting better; Heather Starr is a wonderful addition.

Being a young adult on the [ ] is difficult in many ways, but it is important work to try to understand what I and other people of my age are looking for in a minister... and to help promote those interests through the committee.

Cultural competence could be very important to the [ ], if a person with a marginalized identity should come before it. Fortunately, we have not had to do an actual review of any case at all during my tenure. It is hard to assess how important the competency is in our ongoing work--rule-making, etc.

Cultural competencies & identities are different things. A lack of identity does not equate with a lack of cultural competency or absence of cognizance and appreciation of other cultures and identities. There is no appropriate answer to your Question #15 for one who has no listed identities in Question #14. Also, Question #11 does not allow for recognition of anti-oppression training other than that now offered post-GA. Consequently, I answered "no" to Question 11, but said that my anti-oppression training (other than post-GA) was very important to my work on the Nominating Committee.

Dear JTWTC: I'm sorry I didn't get to this earlier. Here are some comments in no particular order of priority. I am just sharing some personal reflections with you. They are all based on the premise that excellent leadership is the priority. (Choosing people who are not qualified for leadership just because they are from the group that is being wooed is not the right approach.) - Having few leaders in our movement who are from historically marginalized groups usually stretches a small pool. This impacts the leaders, the leadership, and the work. - If the right leader or representative from a historically marginalized group does not emerge, I suggest bringing on a leader who understands the work at hand plus focusing on leadership development and mentorship for all leaders in areas of Anti-Racism/Anti-Oppression/Multiculturalism. - The [ ] cannot fulfill its mandate to provide excellent leadership while at the same time being hemmed in by unrealistic demands from stakeholders for filling the slots with "x" number or persons from historically marginalized groups so that it will look "good." - In my experience, there is often some measure of tokenism. I often hear, "So and So is on our team/committee/task force and so, we are definitely diverse." I am reminded of the privilege of power dynamics. For example, as someone from a marginalized group, I recognize that people from the dominant culture sometimes speak for me... without referring directly to me. I recognize that it is a part of the way of the world--and we are a microcosm of our world even as we try to change things. - This work requires a lot of networking, follow-up and presence. It also requires trust. Trust in our leaders. Trust in ourselves. Trust in each other. - The [ ] needs to be free to put the best persons in leadership positions. We need to figure out ways to make real our commitment to AR/AO/MC as a grand UU collective.... As you well know, no one committee or group can be expected to be fully responsible for transforming our beloved movement. Please let me know if you have specific follow-up questions. Thank you for your diligent work. It makes a difference to our faith community.

Dear Journey Toward Wholeness Committee, As I completed the survey, I found it difficult to answer some questions. Question 13 "How often does your committee address cultural competency or use an AO lens" only has 3 options Often, Seldom, or Never. How about Sometimes? More than Seldom but less than Often? And for question 15, why isn't there an "other" choice? I don't believe that the NomCom knew of my class, but I do know they knew I was a young adult...and I think my age was a factor in the choice, but not my class. From this, the rest of the questions became more difficult.

For question 14, I would say that I grew up working class/economically disadvantaged, and it shapes who I am, but I would not classify myself that way now.

I am functioning on the assumption that NomCom and COC follow their guidelines as I don't sit with the committee to observe how they work. It's difficult to answer some of these questions unless I'm just assuming they work well and follow their guidelines. The results seem to bear out that they do.

I am just starting on the [ ], and know little thus far as to just how they operate.

I believe a major contributor to the effectiveness of the committee was the presence of people who were members of the marginalized group and allies to that community.

I believe in our faith's premise, but wonder where it will go to act its way out.

I believe that people being nominated or appointed for service to the Association at this level should be able to demonstrate cultural competencies. I also believe this standard should apply across the board - in my experience, some committees and task groups took this very seriously, and others did not. I think it's critical that standards of accountability be established and utilized. If training on cultural competencies is set up, people who don't have experience as allies in that area should be required to attend, if they wish to serve. Allowing different standards about this makes a mockery of the Association's emphasis on cultural competencies. Further discussion about what it means to be an ally to groups that have experienced historical marginalization or oppression is also needed.

I believe that the appointments to the [ ] intentionally try to have broad inclusivity. As the [ ] meets, we openly discuss these aspects as we discuss [ ]. We also try and openly discuss our individual limitations in this area in an open and supportive setting. These conversations are welcome and affirming in our setting, although not always easy. As a Committee we discuss our obligation to the denomination to broaden our inclusivity and our identity as a denomination. We recognize that this is our only means of survival and growth.

I do not believe age corresponds to a marginalized identity (rather, there are stages of life we want to empower), but I do believe young adult was a factor in my appointment and was viewed as an asset, potentially tokenizing - yes, absolutely.

I felt that one nominee to my committee was selected only for identity, not interest or skill. But a couple of other nominations seemed to miss opportunities to look for more diverse identities or deeper cultural competencies.

I gave the [ ] a short overview of the ARAOMC training at our August meeting, and we'll spend more time with this at our December meeting.

I have a clinical Social Work license. Persons with mental health credentials are also important to comm. We have just retired a member with MH credentials. Please find us another.

I have attended AR/AO trainings, but not after GA hence could not answer questions 12. I have only recently been appointed to my committee so could also not answer 13, but an answer was required so I just picked the middle one.

I knew the Nominating Committee was considering identities as part of determining its slate. I did not see my identities as part of normally considered marginalized groupings, but long experience in Unitarian Universalism, technical background, and military background seemed to me as bringing very different perspectives to a UUA committee.

I left [] in Dec 2008. During my tenure we made some progress on expanding the concept of oppression to include ableism although I believe it remains a "stepchild" to efforts to combat racism and gender/sexual identity discrimination.

I think it would be amazing for each group/committee to have to create a 1-2 sentence statement about why our particular work benefits from have an awareness of anti-racism & anti-oppression issues. If not that, then perhaps the JTWTC could draft such a statement for each committee? I can imagine lots of ways our committee could be more mindful of the AR/AO/M work we are (or are not) doing...

I think our movement does not take diversity of religious background (I am Jewish) as seriously as it should.

I think that the [ ], the committee on which I serve, should be representative of the various identity communities.

I think the requirement that our committee have an ARAOMC training was very important, and the committee learned a great deal from that training.

I think the training offered has virtually no relevance to true cultural competency in meeting planning. The AR/AO/MC training is simply not a practicum for decision making in the context of the committee/s work.

I was appointed to the committee as a Canadian member in order to reflect the different culture within Canadian societies and more important the different study options available to Canadian students

I was excused from the post-GA AO/AR training based on my stated intention to do some work myself, using materials from the training and the AO/AR requirements of the [ ] Committee.

Identities and representing diversities matter, but so does theological/political commitments. Yes, change the players at the table, but also change the architecture of the table!

If I did not attend a post-GA training (I received training multiple times in other venues) how could a response to the following question be required?

In regards to question 18, I am a brand new member of the [ ] and therefore have not experienced yet how their [ ] process works. I am as of now the youngest person to ever be nominated and elected to the [ ], and I am unsure if I was chosen to provide a young voice, to make the committee more rounded or diverse, if I was truly the best person for the position, or a combination of these factors. I would hesitate to assume that my nomination to the committee was tokenizing at all, but I am at this point genuinely unsure.

In the application process there was not an appropriate way to disclose often-marginalized identities. One could have guessed from my involvement with certain groups but I was very uncomfortable mentioning that in a letter which could come across as pick me because of my often-marginalized identity. A standard form with an area to check those aspects of one's self would have been better.

Keeping the issue visible and discussed is important to prevent complacency.

Members of the [ ] are very aware of issues of diversity and inclusivity. They are an integral part of our decision making.

Money is a great barrier to access to training and time for training. We are intentional about using our ARAOM knowledge/experiences, but not able to do much training. Post-GA trainings are inaccessible to those of us without financial resources. We have made great strides in the last 3 years, but hope for there to be money to help us further in the coming years. We have canceled plans for work due to UUA cutbacks, and our

committee now only meets annually, which makes keeping our ARAOM lens development as a group very difficult.

My path to [ ] started with my work on the [district] Board of Trustees. Through that position, I attempted to attend the [ ] Leadership School, but was rejected twice because of my age (the school apparently considered me unfit for congregational leadership at that age, despite my extensive and demonstrated history at both the congregational and then district levels). Because of this, I was forced to fly halfway across the country to attend the [ ] Leadership School, which did not have the same discriminatory practices. It was there that I met [ ], a wonderful individual, who helped get me on the path towards becoming a member of the [ ]. I found it very ironic and fitting that it was the attempts of my district's sponsored leadership school to discriminate against me because of my identity that eventually led me on the path to a higher UUA office. The other critical lesson from this story, however, is the importance of building the leadership experience and skills of people of under-represented identities in places like our districts. Anyone looking to diversify the top ranks of UUA leadership must also look at the other levels of leadership and work towards a more systemic and long term cultivation of talent and interest amongst people of various identities. This is akin to what the armed forces have done relatively successfully, identifying promising people and shepherding them through a process to build their experience and skills before placing them in top positions. I feel strongly this needs to happen at the UUA level also.

Not sure what good asking our opinion on the COC/Nom committee decisions are. I can only speak for myself.

Our committee has individuals who do represent marginalized groups.

Questions 12 and 15 do not offer a "not applicable" answer, which is what I would have given.

Regarding question #13; I do not think it is appropriate to force an answer to questions I am not sure about when "not sure" is not a choice.

Survivors of clergy misconduct are so marginalized it's not even viewed by most people with any authority as a justice issue. I'm not surprised it was not in the list above.

The AR-AO training the [ ] received at the beginning of our work enhanced every meeting that followed. We evaluated our meetings daily using an AR-AO rating & we used the standards in our many meeting discussions. Very useful to have the concept lifted up from the very start.

The AR/AO training session that I attended in 2005 could have been better than it was in all respects. And the presenters (and the group as a whole) were basically insensitive to a person in the group who was hearing impaired and who repeatedly asked for them to use microphones when speaking only to have the request met with by one speaker and then forgotten or ignored time after time.

The UUA's anti-racism, anti-oppression agenda appears to me to be more the talk of well-meaning guilt-ridden privilege (like me) than anything meaningful to our world or the growth and influence of our denomination.

The [ ] appears to me to have been selected first by competence in the needed field. Commitment to trying to effect the both parts of our mandate (investment return AND socially responsible investing) seems to have been a factor in being selected for a second term.

The [ ] has an educational component at every meeting that focuses on a multi-cultural/anti-racism issue. These have been very beneficial to the members. Additionally, members of the committee use a multi-cultural/anti-racism lens as we do our work and the process observer is responsible for observing and keeping that lens as a focus in our work.

The [ ] has been in contact with the Committee on Committees on a regular basis to discuss the diversity on our committee. It is our impression that the CoC has worked to provide us with as much diversity as possible.

The [ ] worked very hard to be clear about rules, procedures, and guidelines and to revise them to be congruent with UU Purposes and Principles.

The committee views issues of privilege, oppression, marginalization very important. It is reflected in how we view aspirant materials, in forming our questions, our assessment of interviews. We also spent time before and after interview discussing our own issues and experiences with these issues and how we must continuously be vigilant in our education and awareness.

The panel's charter requires a [ ]. I was chosen to be that [ ].

The question about the post-GA training: I wasn't sure what you were asking about. I've had lots of AR/AO training but not attached to GA.

The year I was nominated was the last year that any nominations were made outside of the application process for [ ] positions. Anti-racism/anti-oppression was a strong factor in our deliberations, and I believe the [ ] underwent a significant transformation under the leadership of chairs [ ], [ ], and [ ]. It was not an easy transition, and the vision of these three leaders made it possible. When I first came on the [ ], there was significant tension over my role and that of others both inside the committee and from the outside. From the inside, there was concern that I was bringing an agenda as a POC or an "agent" of DRUUMM. From the outside, some were under the impression that I had the responsibility to advocate for the opinion of DRUUMM rather than voice my own opinion. Whereas this created much tension early in my tenure, the[ ] developed a much better understanding of these issues, again with the help of our chairs.

There is no question in my mind that we tokenize people with identities that place them in marginalized categories. I can offer many examples if you wish to contact me. I also think it's unfortunate that we elevate training on anti-racism, Multiculturalism, anti-oppression above any other training and often to the exclusion of even looking at what other training is needed. I am delighted to finally see this question as part of a survey and I applaud it.

These don't seem to be the right questions--our committee started our work with Paula Cole Jones leading a workshop; we consistently looked at everything we did through an AR/AO lens--talked about it at every meeting.

This is all more complex that these easy categories. My wife is [POC], so ours is a mixed marriage, and our kids are mixed race. We both grew up poor but are now financially well off. We contribute to the diversity of UU's but not as a marginalized group.

We always look for and ask about ministerial aspirants' AR/AO/MC perspective and experience and recommend continuation of current practices or increased education, training and experience. I know that AR/AO/MC awareness is looked for in candidates for the [ ]. I also know the [ ] looks for competency in AR/AO/MC, but have the impression that our committee's practice is due to the initiative of people on the committee. I wonder if someone should develop more specific suggestions for developing competencies, which we might pass on to aspirants/candidates. A member of the [ ] told me she thought it was too early in the educational process for the [ ] to address those concerns. I would disagree.

We had good trainings on the [ ]. We took anti-racism work very seriously. We dealt well with newer issues like polyamory and intersex identity. The tokenization question is not a yes, no, not sure issue. Two questions seemed the same to me i.e. was this work important to your committee?

While many today don't consider being a woman to having a marginalized identity, I can tell you that as a liberal/democrat...and a woman... in a male industry (investment analyst / finance) dominated by conservative Christian Republicans, I'm used to being one of the few women at every setting.

Appendix C: Demographic data from Committee on Committees and Nominating Committee

Committee on Committees Appointments 2008 - 2009

This information was taken from applications on file with the Committee on Committees.

Identity	2008		2009		Total	
Total	37		29		66	
Female	18	49%	20	69%	38	58%
Male	16	43%	9	31%	25	38%
Unidentified	3	8%	0	0%	3	4%
African American	2	5%	3	10%	5	8%
African American, White and Native American	1	3%	0	0%	1	2%
Asian	2	5%	0	0%	2	3%
Bi-racial	0	0%	1	3%	1	2%
Indian	0	0%	1	3%	1	2%
Latina	1	3%	0	0%	1	2%
White/Chickasaw American Indian	0	0%	1	3%	1	2%
People with Disabilities	0	0%	1	3%	1	2%
Bisexual	0	0%	1	3%	1	2%
Lesbian	0	0%	2	6%	2	3%
Young Adult	2	5%	4	14%	6	9%
Older Adult	3	8%	1	3%	4	6%

- Only the applicant's self-identified identity information was used.

- Identity information was sporadic prior to 2008 so the review was limited to new 2008 and 2009 appointments. LGBT identity information was only available for 2009.

- Persons may be counted in more than one category

Nominating Committee Nominations 2008 - 2009

This information was taken from applications on file with the Nominating Committee.

Identity	Count	Pct	
Total	19		
Number of men	9	47%	
Number of women	9	47%	
Queer/pan sexual	1	5%	
African American	2	11%	
People with disabilities			This identity was not requested
LGBT	5	26%	
Young adults	4	21%	
Seniors	1	5%	

- Only the applicant's self-identified, identity information was used. Ability/Disability information was not available.

- Persons may be counted in more than one category

Appendix D: Interview Summaries

UUA Committee on Committees and Nominating Committee
Prepared by Dr. Susan Gore
November 5, 2009

As the governing body of the UUA, the UU Board of Trustees plays many important roles. Perhaps none is more important than identifying current and future Association leadership through the work of the Committee on Committees and the Nominating Committee. The Committee on Committees appoints more than 25 volunteers to working committees of the Board every even-numbered year, as well as filling vacancies that may arise. The Nominating Committee screens candidates for election as the Association President, Moderator, Financial Advisor, and Nominating Committee.

The goal of interviewing members of these Committees was to assess their views and experiences in relation to the Association's commitment to becoming an Anti-racist/Anti-oppression/Multicultural (AR/AO/MC) institution. All but one member of each Committee was available to be interviewed, and efforts continue to obtain their input. Following are some general trends that emerged through the interviews. Please do not read them as representing every individual's opinion; as always, Unitarian Universalists hold a healthy range of views. The goal here is to identify how the Committees are similar and different in their overall functioning and culture.

Bullet-point summaries for each Committee also are attached. While there are more similarities and differences between the Committees, it would be misleading to lump the responses together. For example, in response to Question 1, almost all Nominating Committee members described their Anti-Oppression/Anti-Racism/Multiculturalism involvement as lifelong, and all embraced AR/social justice as a fundamental part of their identities. Committee on Committee members were more likely to come to Anti-Oppression/Anti-Racism/Multiculturalism awareness in their adult years. In response to Question 2 on their Committee's mission, having impact on the future direction of the UUA was commonly voiced by Nominating Committee, while Committee on Committee members described their charter as identifying "the right skills" and "fit" among appointees to UUA committees.

Both groups viewed their work as providing leadership development, however they differed in expectations of Anti-Oppression/Anti-Racism/Multiculturalism competence as a prerequisite for elected or committee candidacy. Nominating Committee members appeared to operate on the assumption that a commitment to Anti-Oppression/Anti-Racism/Multiculturalism was a fundamental requirement for candidacy. Overall, the Committee on Committees ranked skills first, representation of People of Color (POC) second and Anti-Oppression/Anti-Racism/Multiculturalism consciousness third as criteria for volunteer appointments. This difference may be understood in part by the different levels of service targeted by the Nominating Committee and Committee on Committees, as well as the sheer number of candidates each Committee is responsible for identifying.

Members of both Committees credited post-GA AR/AO training as well as procedural materials as key parts of their orientation to the work and culture of the Committee

(Question 3). Most had not thought about the prospect of Committee members being "oriented" to them aside from reading their applications, checking references and/or internal discussion of their candidacy (3B).

Question 4 asked about examples when a Committee "was successful in identifying and placing leadership that advanced the goal of diversity in UUism and/or the larger world." Members of both Committees cited "finding All Stars," operating in a culture of mutual trust, and expanding the diversity of leaders as notable achievements. Several used a "farm team" metaphor as a valuable approach to institutionalizing diversity. For some, success in expanding diversity required representation by POC. For others, Anti-Oppression/Anti-Racism/Multiculturalism consciousness was more important than skin color. Either way, "direct personal experience" was seen as the sine qua non of understanding AR/AO. Multiculturalism was rarely cited in response to this or any other interview question.

Failures in expanding UUA leadership (Question 5) were attributed largely to a lack of proactivity by the Committees and the limited number of "diverse applicants." Mismatches between the UUA's organizational culture and individual experiences or congregational expectations also figured prominently. Specific failures attributed to mismatching included the Crossroads training model, creating an Accessibilities Task Force staffed solely by people with disabilities and, historically, identifying "diverse" candidates who were successful on the GA Planning Committee.

Members of both Committees agreed training would be a useful institutional support for "advancing commitment to Anti-Oppression/Anti-Racism/Multiculturalism diversity in UUA leadership" (Question 6). Increased use of technology was viewed as one way to expand potential diversity by reducing the time and money required of leaders at the Committee and elected levels. At the same time, taking more time to "center in face-to-face meetings and focusing on the UUA's vision of inclusion was prominently mentioned, as was "expanding the pool of people who can imagine themselves as denominational leaders."

Monitoring success in expanding diverse leadership (Question 7) did not elicit a consistent response from interviewees. The current model favors informal self-assessment. A report by the Committee on Committees solicited by the JTWTC showed appointments of POC between March 2007-2009 were disproportionately high compared to representation both at the congregational level and in the US population.

Asking members to imagine their Committee's relationship to Anti-Oppression/Anti-Racism/Multiculturalism four years from now (Question 8) caused almost everyone to pause, sometimes at length, before answering. Responses ranged from "no way to even speculate" and "more languages spoken at 25 Beacon" to proposals for bringing leaders from all UUA committees together with Anti-Oppression/Anti-Racism/Multiculturalism group leaders to promote mutual understanding and collaboration. Changes in Board governance and the presidential election process, as well as demographic changes in the population at large, also were viewed as having significant impact. The overall hope was that AR/AO would be more embedded in UUA leadership, however, there was little confidence that such an outcome was assured.

Summary

All Committee members interviewed take their responsibilities very seriously and hold high expectations for themselves and their Committee work. The degree of seriousness has an unintended consequence of promoting a risk-averse approach to nominations and appointments, which disproportionately affects candidates outside the normative range. Women and gay/lesbian Unitarians appear to be embedded in the norm, along with retired white men, while people of color and those with disabilities, lower education/income, income that is dependent on billable hours (e.g., finance professionals, psychologists, lawyers), family responsibilities, different working or thinking styles and theological bents (e.g. Thandaeka) are less likely to appear to "fit" Committee criteria. Youth are beginning to be recognized as valuable resources, however, they often have work/school and financial constraints that limit their ability to participate.

A focus on filling vacancies "successfully" and the dearth of POC applicants overtakes AR/AO as a critical lens informing Committee nominations. Committee members uniformly described their work as intense and, often, exhausting. One member commented some candidates only get "one strike, not three," and that "failure" by a person of color was unfairly generalized all members of that race or even to all POC. Part of the loss of AR/AO awareness was attributed to the volume of work required at each meeting: "We struggle with busyness and fragmentation. Where is our transcendent vision of the common good beyond the denomination?" When POC are identified as viable candidates for committee work, they risk being over-selected and identified primarily in terms of their race rather than other identities or capabilities.

The referent of "AR/AO/MC" as it is understood in most discussions is limited to POC and, even then, primarily refers to African-Americans. African-American interviewees spoke to this in different voices. For most, representation by POC on the UUA Board and committees was necessary to promote diversity in leadership, based on the premise that "lived experience" equates with AR/O/MC consciousness and that the visible difference would promote awareness in others. Some POC—African-American and other—said positions should not be "marked" for POC and that white allies who have developed AR/AO/MC competence can sometimes be more effective than POC in promoting diversity because they represent "the norm." Multiculturalism was noticeably absent in almost all interviewees' comments.

Questions to Consider

How can the JTWTC encourage UUA Committee leaders to expand their understanding of AR/AO/MC and "diversity" most effectively? As noted above, there are many forms of diversity that inform Unitarian Universalism. The absence of multi-cultural awareness is a serious gap in any effort that purports to embody AR/AO/MC consciousness. Training was suggested as a primary tool for educating current leaders, along with re-focusing on the vision of a beloved community that transcends current UU demographics. Inclusion is another dimension of diversity that bears consideration. While diversity emphasizes the differences among us, inclusion denotes the attitudes and behaviors that demonstrate those differences are valued. Representation by youth, POC, women or other identity group members does not ensure effectiveness nor even support

for expanded AR/AO/MC consciousness. Embracing different people, abilities and perspectives is necessary for inclusion and real change.

How can the JTWTC contribute to reducing fear of failure by Committee on Committee and Nominating leaders, as well as on the part of diverse candidates who may be unable to imagine themselves as valued leaders in the current structure or unwilling to take on the dual burdens of Committee work and representing their identity group? As one interviewee noted, there is a lack of "joy" at the congregational level about serving on UUA committees. Giving back to the Association and the perceived status in being appointed appear to drive the majority of applicants, including some who are identified as POC. Demonstrating success can be achieved by various means is one way to ally fear of failure; there are many ways to organize a meeting or exhibit AR/AO/MC competence, for example. One size does definitely does not fit all Unitarian Universalists! Language is another key part of how opportunities are viewed. Although AR/AO/MC is the commonly accepted terminology, more than one participant noted starting with "anti" language puts the focus on barriers. Beloved community and Standing on the Side of Love are two examples of how language can be used to emphasize the positive.

How can the JTWTC impact the "leadership pipeline" to support the UUA's commitment to be an AR/AO/MC institution? The "farm team" model articulated by several interviewees has the advantage of familiarity and support among some Board Committee members already. The question remains how the JTWTC might implement such an effort. Representation and expanding knowledge about how to behave competently in AR/AO/MC terms are both relevant to promoting UUA and JTWTC goals. Monitoring has been shown to be effective. The key, as one participant put it, it to shift the expectations of monitoring away from a "score-card" approach toward a perception that AR/AO/MC is so integral to the success of committees that they want to demonstrate their level of accountability. Ultimately, clarity around the mission of the JTWTC and the UUA will determine the success of AR/AO/MC efforts. As one interviewee put it so eloquently, "To the extent the mission is clear and exciting, it becomes clear who needs to be at the table."

In case the information above seems daunting, Helen Bishop has given permission to be quoted with a sentiment expressed by several Committee members who were interviewed: **"I want to say to the JTWTC what you are doing with these one calls is transformation in itself. It's the first such phone call I've ever received. Putting these questions together and having someone with expertise do the interviews is transformational work."**

Nominating Committee—Interview Summary
Prepared by Dr. Susan Gore
November 3, 2009

1. **On a personal level, please tell me about your involvement with AR/AO/MC efforts. How has that been affected by your work with the Nominating Committee?**

    The stories of involvement were often amazing, sometimes painful, and always heartfelt. Of the 13 individuals interviewed, more than 2/3 cited involvement that began in their youth.

    • Belief in the need for visible representation by People of Color (POC) on the Nominating Committee.

    • Struggle over what it means to be a white ally.

    • Concern about "anti" language and the lengthening acronym (AR/AO/MC).

    • Concern about how much time and money is spent on limited number of candidates.

2. **How do you understand the mission of the Nominating Committees and how that relates to AR/AO/MC?**

    • Leadership development was most often cited.

    • To make sure variety (in nominations) exists.

    • To institutionalize AR/AO lens.

    • To seek people capable of (learning) AR/AO lens in the context of UU principles/values.

    • To be at the cutting edge influencing the UUA's direction.

3a. **How were you oriented to the work and culture of the Nominating Committees?**

    • The Fall Board retreat and recruitment by someone already on the Nominating Committee led the number of responses.

    • The post-GA "AR/AO" training, procedural materials, liaison assignments and other informal means.

3b. **To your knowledge, how was the Committee oriented to your joining its membership?**

    • Most hadn't thought about this as a formal committee activity beyond reading candidates' applications, checking references and knowledge from pre-existing personal relationships.

    • Orientation of the Committee to incoming members was essentially an individual process.

4. **Describe a time when you feel the Nominating Committees was successful in identifying and placing leadership that advanced the goal of diversity in UUism**

and/or the larger world. What were the things that you feel make that success possible?

- Soliciting candidates "unknown at the Association level but All-Stars" was most often cited.
- The quality of interactions with each other also was viewed as a sign of success.
- Participants felt giving unsuccessful candidates feedback about growth areas for future opportunities helped make their success possible, as well as the candidate's.
- Female representation is no longer viewed as an after-thought in recruiting applicants.
- Recruitment that includes differences in sexual orientation, gender identity, ethnicity, bilingual ability and age was seen as positive; class differences were largely ignored.

5. **Describe a time when you feel the Committee failed in advancing diversity in social group identities within in UUism and/or the larger world. What happened, in your view?**
   - Lack of information about some candidates, especially feedback when POC stepped down from committees or "didn't deliver."
   - Too little understanding of the opportunity/burden for POC being highly visible in UUism.
   - More than one person felt POC got only "one strike" versus "three strikes" before a judgment was made not only about their abilities but about all people who shared that racial identity.

6. **What kinds of institutional support (e.g., policies, guidelines, resources, training, etc.) would be useful toward increasing your committee's success in advancing commitment to AR/AO/MC diversity in UU leadership?**
   - Training related to AR/AO/MC consciousness was most often mentioned.
   - Expanding the pool of people who can imagine themselves as denominational leaders.
   - Reducing the current travel requirements with financial and/or technological support.
   - Restructuring the Board to promote diversity.
   - Looking "at ourselves, our faith," possibly in the context of a meeting of the Nominating Committee, Committee on Committees and leaders of marginalized groups to promote awareness and collaboration.

7. **What internal or external processes do you see as necessary to monitor your committee's effectiveness in identifying and placing leadership that reflects diversity of social group identities within UUism?**
   - Internal self-awareness.

- The outcome of elections and feedback from liaison assignments.
- Other single responses included:
    - Review of AR/AO/MC reports from the Nominating Committee to the Board of Trustees
    - No monitoring needed
    - Uncertainty over the chain of accountability

8. **Imagine it is 2013. How do you predict the Nominating Committee will be different in relationship to AR/AO/MC four years from now?**
    Participants almost uniformly paused at length before responding to this question.
- Increased leadership development, e.g., farm team model
- AR/AO commitment will be internalized and used as a lens from the outset for Committee actions
- No real difference was expected, ocean liner versus speedboat analogy
- Depends on the impact of new or proposed Board governance and elections changes
- More communication at the District and congregational level, especially using advanced technology
- Expanded venues for recruiting applicants throughout the year.
- Continuing to develop and normalize the AR/AO process
- Tying leadership opportunities to career goals of youth.

Committee on Committees—Interview Summary
Prepared by Dr. Susan Gore
November 1, 2009

1a. On a personal level, please tell me about your involvement with AR/AO/MC efforts.

- Most came to AR/AO/MC campaign of the UUA from other social work entered into as adults; 4-5 also cited childhood experiences/awareness/activism. One stated the UUA AR work is specifically why she became a UU.
- Committee service has been transformational and/or a burden to some, especially POC (people of color) who are in limited supply as committee applicants.
- All Committee members emphasized their sense of responsibility to "getting it right."
- Stories about the importance of the Calgary resolution (1992) and interviewees' subsequent AR/AO work came up repeatedly.

1b. How has that (involvement) been affected by your work with the Committee on Committees? ("learnings")

- After Calgary, fear that AR was the "party line" led to resistance, mistrust and nervousness among some ministers (almost all white men in middle/upper-class congregations)
- Resistance to/rejection of Crossroads approach, "shaming/blaming model"; conflicts of interest seen when UUA staff on Crossroads board and its performance review committee.
- Learned "Integration—oh, that's so '70s!"
- Learned POC get overworked because few in congregations, fewer with national level experience. Became aware of the importance of allies taking responsibility to advocate, too.

2. How do you understand the mission of the Committee on Committees and how that relates to AR/AO/MC?

- Most emphasized mission as finding "right skills and people for committees."
- Leadership development, improving pathways for new leaders and cultural competence for all also was cited.
- Representation of POC on committees appears to be the current emphasis: "The application asks about AR/AO commitment and experiences. In the end, (racial) identity is primary."
- "AR/AO consciousness goes out the door when we get so focused on the details of doing our task."

- One said the Board doesn't have an institutionalized way to know how to be culturally competent. (The way it works now) skilled, sensitive individuals smooth the way for newcomers—and long-timers.
- Conflict of interest seen in Nominating Committee nominating slate for its own committee.
- Changes in committee function are expected by some with the UUA's shift the Carver policy governance model for UU BOT and committees. The future of the Committee was not on most peoples' minds; the focus was on how things have worked to date.

3a. How were you oriented to the work and culture of the Committee on Committees?
- Post-GA AR/AO training (MC not mentioned)
- Procedural, nuts-and-bolts emphasis over mission-driven or visionary
- First meeting includes "bonding" activities, mealtimes, serious conversations

3b. To your knowledge, how was the Committee oriented to your joining its membership?
- Most hadn't thought about this as a formal committee activity beyond reading candidates' applications, checking references and knowledge from pre-existing personal relationships.
- Orientation of the Committee to incoming members was essentially an individual process.

4. Describe a time when you feel the Committee on Committees was successful in identifying and placing leadership that advanced the goal of diversity in UUism and/or the larger world. What were the things that you feel make that success possible?
- Stands taken by the UUA were transformational in individuals' commitment to AR/AO, e.g., the Apartheid financial divestment vote, the Calgary resolution to do AR/AO work, the MFC work.
- Willingness and ability of Committee on Committee members to seek out good candidates for 25-30 appointments every even-numbered year plus filling mid-term vacancies.
- Trust among Committee members to vote on unknown applicants based on others' knowledge, as well as the candidate's application and references.
- Several appointees were named with pride, hope and affirmation for the future of the UUA.
- "Fit" is key to successful appointments. The Committee is committed to expanding understanding of who fits.

- A "farm team" metaphor was used by some to describe how best to increase diversity—identifying talent and providing mentoring, experience prior to more visible appointments.

5. **Describe a time when you feel the Committee failed in advancing diversity in social group identities within in UUism and/or the larger world. What happened, in your view?**
   - Not being sufficiently proactive in identifying candidates representing diverse constituencies.
   - The perceived trade-off between a candidate being "qualified" and a POC or "diverse" represents a dilemma for several Committee members.
   - Specific examples included the Crossroads training, creating an Accessibilities Task Force consisting only of people with disabilities, and placing "diverse" candidates on the GA Planning Committee. UUs' tendency toward being anti-structure was assessed as a major reason Crossroads failed, while committees' unwillingness or inability to recognize the benefits of different work styles was cited in explaining at least some GA Planning Committee (and other committee appointment) failures. Using someone's identity as the sole criterion for committee appointment was viewed as key to the Accessibilities' group failure.
   - Several cited intervention by DRUUM in counseling POC candidates not to accept Committee appointments because their talents were needed more in their community of color.
   - Two or three individual "diverse" applicant's lack of capabilities or inability to perform up to Committee expectations was described…along with recognition that one candidate's non-performance can be seen as typical of all similar candidates. "Some people only get one strike."
   - The overriding concern was that there is too small a pool of "qualified applicants" who represent diverse backgrounds, in particular too few People of Color. To paraphrase one interviewee, "We run them ragged or run out of them."

6. **What kinds of institutional support (e.g., policies, guidelines, resources, training, etc.) would be useful toward increasing your committee's success in advancing commitment to AR/AO/MC diversity in UU leadership?**
   - Ongoing training, education and experiences related to AR/AO/MC were the top desire for institutional support, accompanied by recognition that there is ongoing tension around resource allocation, board/staff roles and the UUA/congregations.
   - Expansion of the current model to promote awareness and development of leaders representing diversity beyond a "black/white" lens.
   - Increased technological support and use by all committees, based on limited resources and the limitations of a face-to-face model of committee work in terms of who can participate.

- Time to center and explore mutual education between minority and non-minority Committee members.

7. **What internal or external processes do you see as necessary to monitor your committee's effectiveness in identifying and placing leadership that reflects diversity of social group identities within UUism?**
   - Most saw monitoring as informal—checking up with committee chairs after the first meeting with a new appointee and/or asking the appointee.
   - Most said failures were far more likely to receive attention than successes.
   - A report by the Committee on Committees was cited as one example of how monitoring was done, and produced "surprising" results in demonstrating representation of POC among committee appointments.
   - Other responses ranged from "I don't see (monitoring) as meaningful" to "We need to convey how monitoring is to vital to advancing the goals of AR/AO/MC in the UUA and beyond that we want to ensure we are having the impact we are capable of as UUs—versus a "score-keeping" approach.

8. **Imagine it is 2013. How do you predict the Nominating Committee will be different in relationship to AR/AO/MC four years from now?**
   - Responses ranged from "no way to even speculate" and "more languages spoken at 25 Beacon" to "bringing all committee chairs and under-represented group leaders together" to promote grounding in a common vision of UUism and collaboration. Others emphasized:
   - More centered/visionary and less introspective.
   - AR/AO/MC will be embedded in the nomination and leadership development process, not an overlay.
   - More awareness of and attention to Multiculturalism.
   - More hands-on leadership opportunities with AR/AO lens for UUs who want to consider a denominational role.
   - The impact of external events, e.g., a policy governance Board model, immigration reform
   - Holding responsibilities more lightly, a less status-oriented Board membership culture. More than one person said it would be interesting to think about what would happen if denominational tasks/role were seen as "joyful," "fun" and part of "building the beloved community" and a "transcendent vision of UUism" rather than a "struggle."

Questions posed to UUA Moderator, Gini Courter

1. What are the methods and resources your committee uses to identify potential nominees?
2. Which methods have been the most successful?
3. Which resources have been the most successful?
4. What criteria does your committee use to identify appropriate individuals?
5. Do all members of the committee have a common interpretation of these criteria?
6. Do you use written criteria to evaluate candidates?
7. How does the committee decide that a particular candidate is not appropriate for a post?
8. In what ways do the identities (racial, age, ability, etc.) of the candidate influence the selection process?
9. How does the committee reach decisions about the best nominee for a particular post?
10. In what particular ways is 'cultural competence' a criterion for selecting particular nominees?
11. Do you use a standard definition of cultural competence?
12. How does the committee assess cultural competence? Exposure? Training? Experience? Demonstrated competence?
13. How comfortable are you, as a committee member, assessing someone else's cultural competence?
14. Have you received training on what that means and how to do it?
15. What are the most important challenges faced by your committee in carrying out its task?

Appendix E: Journey Toward Wholeness Transformation Committee Resource Guide

We included these resources so that UUA committees and local congregations might have tangible examples to use in implementing the recommendations outlined in this study. Feel free to adapt these examples to fit the specifics of the group.

List of Resources in this guide:

- Links to pertinent websites mentioned in the study and that may assist in moving toward the Anti-Racism/Anti-Oppression/Multiculturalism journey
    - JTWTC Website
    - 1997 UUA General Assembly Anti-Racism/Anti-Oppression/Multiculturalism Resolutions
        - "Toward an Anti-Racist Unitarian Universalist Association" and
        - "Accessibility for Persons with Disabilities"
    - Journey Toward Wholeness Transformation Committee Reports
    - Multicultural, Accessibility, Equual Access, LGBT Resources
- Definition of Cultural Competence
- Metric to gauge personal and committee cultural competence
- UUA four levels of Cultural Competence
- Process Observation format for attention to Anti-Racism/Anti-Oppression/Multiculturalism in committee meetings
- Example of Mentoring Guidelines for New Committee/Board Members

Journey Toward Wholeness Transformation Committee Website:
http://www.uua.org/jtwtc
Journey Toward Wholeness Transformation Committee Reports:
http://www.uua.org/aboutus/governance/board-appointedcommittees/jtwtc/93574.shtml
Anti-Racism Resolution:
http://www.uua.org/aboutus/governance/board-appointedcommittees/jtwtc/index.shtml
Accessibility Resolution:
http://www.uua.org/socialjustice/issues/civilrights/disability/150801.shtml
Multiculturalism Resources:
http://www.uua.org/leaders/idbm/multiculturalism/index.shtml
Accessibility Resources:
http://www.uua.org/leaders/idbm/accessibility/index.shtml
http://www.Equualaccess.org
Lesbian, Gay, Bisexual, Transgender Resources:
http://www.uua.org/leaders/idbm/bglt/index.shtml
http://truust.org/
Committee on Committees Resources:
Orientation Manual for UUA Committee Chairs
http://www.uua.org/aboutus/governance/boardtrustees/committeesboard/committeecommttees/index.shtml

Definition of Cultural Competence

To build a Unitarian Universalist Association which is authentically anti-oppressive, it is hoped that candidates can articulate what it means to be culturally competent. The definition of "cultural competence" adopted by the Journey Toward Wholeness Transformation Committee is:

> ...an appreciation of and sensitivity to the history, current needs, strengths, and resources of communities and individuals who historically have been under-served and under-represented in our Association. Specifically this entails: (1) an awareness of one's own biases and cultural assumptions; content knowledge about cultures different from one's own; (2) an accurate self-assessment of one's multi-cultural skills and comfort level; (3) an appropriate application of cultural knowledge and an awareness of the cultural assumptions underlying institutional and group processes; (4) an ability to make culture norms visible; and (5) an ability to create structure that is inclusive of multiple cultural perceptions and experiences.

Definition by Pope-Davis, Reynolds, Dings, and Ottavi (1994)
Modifications for UUA made by Paula Cole Jones to
include multicultural competency in institutional change

Please complete the **Multiculturalism and Institutional Change** sheet, first.
Then complete the individual **Multicultural Competencies** Sheet.

Multiculturalism and Institutional Change

Instructions: Please rate each element of Institutional Change on a scale of 1 to 5 with 5 being the highest.

Elements of Institutional Change	You 1, 2, 3, 4, 5	Group 1, 2, 3, 4, 5	Congregation 1, 2, 3, 4, 5
1. I/we articulate an impetus for change.			
2. I/we recognize multicultural competency as an ethical matter.			
3. I/we support multicultural competency as a ministry of the church and the UUA.			
4. I/we can define multicultural competencies.			
5. I/we can identify responsible agencies/committees.			
6. I/we measure proficiencies and our progress in institutional change.			
7. I/we learn from our experiences and communicate our learning.			
8. I/we share and access information on multicultural competencies and institutional change at meetings.			
9. I/we incorporate our learning into orientations, trainings, planning and relevant events.			
10. I/we can provide and follow multiracial, multicultural leadership.			
11. I/we use the language of multiculturalism as well as the language of antiracism and anti-oppression.			
12. We are creating a learning organization to support the development of multicultural competency and institutional change.			
13. I/we have a vision for who we are as a part of a multicultural community and world.			
14. I/we lead from our vision and use it to identify barriers to inclusion and change.			
15. I/we understand racial identity development as a persistent dynamic of intergroup and interpersonal relationships.			
16. I/we are in right relationship with multicultural communities and especially with groups that have been historically marginalized.			
17. I/we understand what it means to be accountable to people in groups that have been historically marginalized due to race and ethnicity.			
Name:	Date:	Group:	Congregation:

Name: _____ Date: _____

Group:_____

Multicultural Competencies

Instructions: Rate yourself, as an individual, on each competency below on a scale of 1-5 with 5 being the highest.

Competency	**Rating**				
	1	**2**	**3**	**4**	**5**
1. I can discuss my own ethnic/cultural heritage.					
2. I am aware of how my cultural background and experiences have influenced my attitudes.					
3. I am able to discuss how my culture has influenced the way I think.					
4. I can recognize when my attitudes, beliefs, and values are interfering with providing the best services to my congregation and community.					
5. I continue to learn about the cultures of the Association, congregations in the UUA and the community, in particular, attitudes toward race/ethnicity; disability; sexual orientation; cultural beliefs and values; and spiritual and religious practices.					
6. I verbally communicate my acceptance of people [of different cultures].					
7. I nonverbally communicate my acceptance of people whose culture is different from my own.					
8. I can discuss my family's perspective regarding acceptable and non-acceptable codes-of-conduct.					
9. I intervene, in an appropriate manner, when I observe others engaging in behaviors that appear culturally insensitive or that reflect prejudice.					
10. I can discuss models of racial identity development.					
11. I can define racism.					
12. I can define prejudice.					
13. I can define discrimination.					
14. I can define stereotypes.					
15. I can identify the cultural bases of my communication style.					
16. I am mindful of cultural factors that may be influencing the behaviors of committee members, Association members, congregants and members of the broader community.					
17. I can identify my negative and positive emotional reactions toward persons of other racial and ethnic groups.					
18. I can identify my reactions that are based on stereotypical beliefs about different ethnic groups.					
19. I can keep from imposing my beliefs and value systems onto members of my committee(s) the Association, my congregation and the community.					
20. I am flexible, adaptive, and will initiate changes, which will better serve the UUA, my congregation, the community, and individuals from diverse cultures.					

Note: The list of competencies is modified from Management Consultant, Paula Cole Jones and the multicultural competencies found in the American Counseling Association. (1995) ACA Code of Ethics & Standards of Practice. Alexandria, VA: American Counseling Association.

Presentation: An Anti-Racism Training Approach for Board-Appointed Committee Members

An Anti-racism Training Approach for Board-appointed Committee Members

Presented by the UUA Board's
Anti-racism Assessment and
Monitoring Team
April 2003

Adult Learning Model
AWARENESS <-------> COMPETENCY

- Stage One
  – Unconscious   <--->   Incompetent
- Stage Two
  – Conscious   <--->   Incompetent
- Stage Three
  – Conscious   <--->   Competent
- Stage Four
  – Unconscious   <--->   Competent

Stage One
Unconsciously Incompetent

- Characteristics
  – Does not notice racism and oppression as systemic
  – Sees only individual and isolated acts of prejudice

  GOAL: Learn history of racism/oppression and resistance, become familiar with UUA history and position, understand definitions and vocabulary

Stage Two
Consciously Incompetent

- Characteristics
  – Aware of systemic racism/oppression, but does not always recognize it
  – Begins to challenge stereotypes of self and others
  – Frustrated at frequent "mistakes"
  – Doesn't know "What to do"

  GOAL: Build skills to recognize systemic racism and oppression, provide tools, encourage peer/affinity group interaction

Stage Three
Consciously Competent

- Characteristics
  – Awareness of issues
  – Has basic skills
  – Open and challenging
  – Visible growth and change

  GOAL: Enhance leadership skills, introduce systems theory, build support with others doing anti-racism and anti-oppression work

Stage Four
Unconsciously Competent

- Characteristics
  – Perceives underlying systemic racism and oppression
  – Has broad based skills
  – Patient with self and others
  – Has ability to apply skills in many areas

  GOAL: Understand change theories, create opportunity to provide leadership and demonstrate commitment and skill in a variety of settings

Our Basic Assumptions

No one should serve on a UUA committee who is unconsciously incompetent in the area of racism and oppression.

There are committees which require members to have reasonable competence in the area of racism and oppression in order to not do harm.

Stage One: Unconsciously Incompetent

- GOAL: Learn history of racism/oppression and resistance, become familiar with UUA history and position, understand definitions and vocabulary
- **Curriculum Strategy:**
  - Broadest possible access
  - Fun, interesting, non-threatening

  Such as videos, books, articles, District brown-bag discussions, interactive CD-ROM, conference call debriefing

Stage Two: Consciously Incompetent

- GOAL: Build skills to recognize systemic racism and oppression, provide tools, encourage peer/affinity group interaction
- **Curriculum Strategies:**
  - Anti-racism/Anti-oppression embedded in skills training for interviewing, effective meeting skills, conflict management
  - Involvement in affinity groups
  - Case studies
  - Tip sheets

Stage Three: Consciously Competent

- GOAL: Enhance leadership skills, introduce systems theory, build support with others doing anti-racism and anti-oppression work
- **Curriculum Strategies:**
  - Strategic Planning
  - Systems Theory
  - Current statistics, information, data
  - Interactions with others at similar stage of learning

Stage Four: Unconsciously Competent

- GOAL: Understand change theories, create opportunity to provide leadership and demonstrate commitment and skill in a variety of settings
- Curriculum Strategies:
  - Leadership for Planned Change (Change Theory)
  - Training of Trainers
  - Benchmarking
  - Ongoing involvement in all previous stages (Coaching/Consulting)

Thoughts and Notes

(Just a quick overview of how the Board-appointed committees might fit into our proposed Anti-racism training approach...)

Stage One Training (draft)

- Annual Program Fund
- Electronic Communication Committee
- Fund for Unitarian Universalism
- Melcher Book Award Committee
- Panel on Theological Education
- Stanfield Art Scholarship Committee
- Stanfield Law Scholarship Committee

Stage Two Training (draft)

- Accessibilities Committee
- Compensation and Benefits Committee
- Congregational Properties and Loans Commission
- Fund for Unitarian Universalist Social Responsibility
- Fund for International Unitarian Universalism
- Investment Committee
- Pamphlet Commission

Stage Three Training (draft)

- Committee on Socially Responsible Investing
- Fund for a Just Society
- Moderator's Task Force on Economic Accessibility
- UU-UN Representatives
- ALL BOARD MEMBERS with the exception of…

Stage Four Training (draft)

- Board Anti-racism Assessment and Monitoring Team
- Committee on Committee Chair
- Finance Chair
- Journey Toward Wholeness

Example of Norms or Covenant Statements for Committees/Boards

Each group is responsible for developing norms based upon its own culture, composition, and agreed upon functioning. Norms/Covenant Statements may be printed and included in a committee information packet.

- We agree to facilitate everyone's participation and at the same time, respect individual processing needs.

- We agree that silence does not mean agreement or consent, and to take steps to verify that consensus (or lack of consensus) exists.

- One person speaks at a time in meetings. We will be sensitive and attentive to soft-spoken individuals.

- We will ensure that equal time is allowed for check-in and/or check-out and monitor that majority identity members stay within those boundaries.

- We will be mindful of building and maintaining a beloved community.

- Everyone has the right and responsibility to "red flag" absence of support for norms so that they are not selectively enforced.

- We will start and end meetings on time, respecting individual needs. Meeting time will be used as efficiently as possible.

- We will work to voice our opinions within the group, not in the parking lot. We agree that when it is personal, we will not triangulate. We agree not to second-guess committee/board decisions.

- We agree to disagree. We agree not to take disagreements personally. We agree to value difference in all of its expressions.

- We are willing to be open and honest, knowing that our openness and honesty will be respected. We agree to respect the opinions of others.

- We agree that moving toward an AO/AR/MC institution is a foundation of the UUA in its journey toward wholeness and that this vision will be maintained in all aspects of our work

Adapted from Dr. David Renz, Director
Midwest Center for Nonprofit Leadership
Henry W. Bloch School of Business & Public Administration
University of Missouri—Kansas City

Example of Mentoring Guidelines for New Members

Role of Mentor: To help a new member become acquainted with the committee, its functions, processes and the other members. Mentor should have sensitivity to the role culture plays in society and on the committee. Mentor should have increased cultural competence if mentoring a historically marginalized new member.

Mentoring Period: Through the first six months to one year.

Mentor Responsibilities:

Establishing the Relationship

- Become a good acquaintance, guide, ally and potential friend

- Enable new member to get to know and feel comfortable with mentor

- Orienting new member

- Attend formal orientation with new member

- Review committee materials with new member

- Inform new member, in detail, about significant responsibilities of committee members, especially areas strictly enforced

- Inform new member about meeting style, i.e. formal/informal, discussion methods, duration of meetings, "hot issues" that are likely to generate controversy, "norms" of the group and the meetings, pertinent history of the group or members

- Inform member about how to obtain additional information from staff and pertinent UUA entities, if needed

- Inform member about recent achievements and unresolved issues

Encouraging Participation and Attendance

- To facilitate new member's active engagement in meetings:

- Contact member before meetings to determine whether there are questions about the agenda or issues that might be discussed with mentor

- Encourage staff to contact new member(s) to assure they have the agenda and other materials, and to determine whether more information is needed about any items

- Suggest that chair use judgment in soliciting opinions/comments from new member during the meeting if member is not participating after a reasonable period of adjustment

- Follow up with member briefly after the meeting to get member's view of the process and comfort with it

- If new member is unable to attend a meeting, make contact afterward and review pertinent agenda items, outcome of any items (e.g. adoption, approval,

rejection, tabling), highlight discussions and contributors who influenced outcomes or who were particularly interested in the issues

Facilitating Social Involvement

- Ensure new member is included in any formal or informal activities—e.g. coffee after the meeting, going out to dinner, etc.

- Ensure new member is aware of any informal cliques/power groups

- Begin to bow out when member seems comfortable and bonded to committee—it is appropriate to bow out when member no longer seems to need mentor's support. However, mentor should show continued interest while gradually reducing "shepherding" role with new member.

- Discuss gradually bowing out with new member and ask whether there might be specific areas that need ongoing assistance

- Before bowing out completely, mentor should solicit new member's opinions on how the mentoring could be more effective, how effective the orientation was, and get ideas about recruiting new members.

Transitioning from Mentor to Team Member

Adapted from Dr. David Renz, Director
Midwest Center for Nonprofit Leadership
Henry W. Bloch School of Business & Public Administration
University of Missouri—Kansas City

Appendix F: History of Journey Toward Wholeness Transformation Committee

As stated in the Journey Toward Wholeness Transformation Committee's report to the 2001 General Assembly: "The Journey Toward Wholeness" initiative grew out of the 1992 General Assembly resolution for "Racial and Cultural Diversity in Unitarian Universalism." The UUA Board of Trustees appointed a Racial and Cultural Diversity Task Force in 1992 which concluded its work in 1996 with a report entitled *Journey Toward Wholeness—The Next Step: From Racial and Cultural Diversity to Anti-Oppression and Anti-Racist Multiculturalism.* That report was studied for a year and accepted by the 1997 General Assembly, which passed the resolution: "Toward An Anti-Racist Unitarian Universalist Association."

The 1997 anti-racism resolution called for the Board of Trustees to establish a Journey Toward Wholeness Transformation Committee. A continental committee, including liaisons from the Board of Trustees, the Jubilee Working Group, and staff, was appointed by the Committee on Committees of the UUA Board in 1997. The Journey Toward Wholeness Transformation Committee defined its mission to "*strategically plan, coordinate, monitor, guide, and assess* [emphasis added] the transformation of the UUA into an anti-oppressive, anti-racist, multicultural faith community."

In 2004, the Board of Trustees charged the committee to focus on assessment and monitoring for two years.

In 2007, the committee's charge was expanded to include ableism as one of the linked oppressions to monitor and assess.