

UUA Board of Trustees Retreat 9/13/2013 Key Insights on Linkage

This document lists the key insights that emerged from the UUA board's work on linkage September 13, 2013.

Process:

- The right Powerful Question to guide the linkage process can surface assumptions and focus the board's attention, and the Sources' attention, on what really matters. For example, Natty Averett asked about the phrasing of the question used during the session ("Who are we, singular and plural?"), asking who "we" referred to. A good linkage process allows time for the board to explore potential embedded assumptions.
- Even though the board would choose a Powerful Question to guide their linkage work, the actual questions they ask the Sources, and the way they ask them, would likely change depending on the Source.
- This board reinforced what the previous board discovered: that it's absolutely essential the board feed back what it hears from its Sources and what impact their input had on the board's work.
- A useful phrase that emerged to describe what linkage was trying to do: Help people imagine the unimaginable.
- As the current board considered their understanding of the Sources, I think they began to realize the depth and breadth of the previous board's work on identifying and connecting with the Sources. While balancing time and resource constraints, the previous board connected with many of the people and organizations the new board wanted included. This reinforces the importance of documenting linkage processes, so that each board can build on the experience of the previous board. The Linkage Practice Guidelines document is one tool we proposed to the previous board to do that documentation.
- The board will want to think about how often it engages in linkage work. Rob Eller-Isaacs made the point that linkage work informs the ends, and suggested that intensive linkage was only done every five years to renew the ends. Terasa Cooley suggested that it might be a good idea to exercise the linkage muscle more often than that. My observation of congregational boards is that more frequent linkage does help them keep the linkage muscle exercised and keeps them connected. This board will need to determine the appropriate amount of time to spend on linkage, and a suitably important purpose for the linkage to find the right balance of linkage with its other work.

Voices for the Sources:

- The board will want to continue to develop its ability to distinguish between Source and beneficiary, and between linkage and monitoring. Many questions trustees raised during the session on linkage demonstrated that these distinctions are sometimes easy to miss, especially since most of us have been trained to respond to customers and not to Sources, and have been trained to solve problems and not create the future.
- The Vision of Beloved Community group said that as trustees for a national organization, they wanted to connect with voices from organizations with a similarly national scope.
- The Current and Future Generations of Unitarian Universalists group felt that the definition of its Source was too narrow, and wondered why youth had only symbolic instead of actual power.
- The Current and Future Generations of Unitarian Universalists group wondered about people who are not yet Unitarian Universalists, and people who have recently found Unitarian Universalism, and about recently formed healthy congregations and how to understand these three groups as voices of this Source. My understanding was that the previous board saw connecting with youth and young adults as the way to connect with people who are not yet Unitarian Universalists. As the paragraph description says “. . .we expect the board’s most significant focus for this Source of authority and accountability will typically be children (or their proxies), youth and young adults because they are the generations most likely to. . .represent, by virtue of their procreative power, how our heritage might be lived in next generations.” Naming people who have recently found Unitarian Universalism or recently formed healthy congregations as voices of this Source could be a possibility for the board to explore further.

Collaboration with the Executive

- Although the previous board collaborated with staff on Gathered Here and other aspects of linkage around the ends, Peter Morales wanted to name that this board was considering more collaboration with the Executive than previously imagined on linkage. For example, the Vision of Beloved Community group envisioned linking with the staff’s justice partners with the Executive’s help to make these connections. We didn’t have time to explore all the implications of that greater collaboration in terms of appropriate roles and use of resources, but it appeared both groups welcomed the opportunities greater collaboration offered.

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