

Linkage Practice Guidelines

As of November 5, 2012

This document outlines the steps the UUA Board will follow to operationalize board policies on linkage. Attachment 1 is a tool for recording the decisions made for each step. The board will collect these tools to provide examples of past linkage processes and to help ensure the intentionality of step 2 below.

1. Identify the purpose for the linkage. In many cases, that will mean developing a Powerful Question the linkage process will help answer. The primary focus for the board's linkage will be to:
 - Understand the Sources' values and the benefits the Association should produce
 - Ensure that board governs accountably on the Source's behalfThe linkage may also have the by-products of:
 - Building a relationship
 - Educating the Sources
 - Creating the future
2. Given the current interpretation of each Source, determine the appropriate voices for each Source. The board will consult broadly to determine this. The board will gradually develop broad categories of people and groups to consult, and questions to guide this process, so that it is truly intentional and avoids being ad hoc. See Attachment 2. In some cases, certain voices will be able to speak for more than one Source.
3. Determine an appropriate, achievable process to hear the selected voices and fulfill the linkage purpose.
4. Step back and look at the whole. Have we selected the appropriate voices and process to do the work we want to do?
5. Invite the chosen voices for the Sources into the process, carefully preparing them to fulfill their role effectively.
6. Conduct the linkage process:
 - Each trustee records the data from the linkage process.
 - Each trustee records lessons learned about linkage in doing the process, including what worked and what they would have changed.
7. Summarize and analyze the linkage data. How did the linkage answer your Powerful Question? What did you learn and what will you do with what you learned?
8. Determine the appropriate accountability back to the Sources on what the board learned and what the board has done with what they learned.
9. Use the lessons learned about linkage in general to update these guidelines.

Linkage Process Documentation

What's the linkage purpose?

Source	Consult With ¹	Appropriate Voices ²	Process to Connect with Those Voices ³	Invitation Needs to Include ⁴	Data to Record and How to Record It ⁵
Our member congregations					
Current and future generations of Unitarian Universalists					
Heritage, traditions and ideals of Unitarian Universalism					
The vision of Beloved Community					

Spirit of life, love and the holy					
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¹ With whom will we consult to determine the appropriate voices for each Source in relation to our linkage purpose? See Attachment 2 for possible groups and people to consult and possible questions to ask them.

² Given our current interpretations of our Sources and our linkage purpose, what are the appropriate voices for each Source?

³ What appropriate, achievable process will we use to hear these voices and fulfill our linkage purpose?

⁴ What information will our invitation to these voices need to include?

⁵ What data will each trustee record and how?

How will trustees record lessons learned about linkage in doing this process?

What did we learn as a board from this linkage process?

How do we need to update our linkage guidelines or Attachment 2?

Consulting to Determine the Appropriate Voices for Each Source

Source	Possibly Consult With ¹	Questions to Ask
Our member congregations		What's the best way to connect with our congregations' elected and called leaders to fulfill our linkage purpose?
Current and future generations of Unitarian Universalists		<p>What youth and young adult events are coming up where we could link with them?</p> <p>What social media and technology tools best engage youth and young adults in our movement currently?</p> <p>How can we connect with unaffiliated UUs?</p>
Heritage, traditions and ideals of Unitarian Universalism		What materials from our history could best help us hear the voice of this Source in fulfilling our linkage purpose?

<p>The vision of Beloved Community</p>		<p>Who could help us hear the voices of the justice-seekers, justice-makers, and the stories of oppression and counter oppression as we do our linkage?</p> <p>What sermons and sacred texts from all faith traditions could remind us of love, connectedness, relationship and community in relation to our linkage purpose?</p> <p>What arts including literature, poetry, theater, music, and stand-up comedy could help us fulfill our linkage purpose? What communities approach Beloved Community and whom could we talk to in those communities? What witness events or worship might we participate in?</p>
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Spirit of life, love and the holy		What personal and collective spiritual practices could help us fulfill our linkage purpose? What spiritual texts and teachings of world religions, science and reason, the arts and literature could help us fulfill our linkage purpose? What acts of reconciliation, wholeness, and love would make this Source visible in relation to our linkage purpose?
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¹ Over time, this column is meant to give intentionality to the board's choices about whom to consult about which voices to include for each Source in your linkage work. It may include guidelines about groups to consult, specific groups or people to be sure to consult, lists of people previously consulted, or other notes to help the board in its choice of consultants on the appropriate voices for each Source to fulfill a particular linkage purpose.