

Proposed Plan for District-UUA Board Communications and Linkage, 2013-2014

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Linkage Working Group

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introduction

The UUA Board, in collaboration with the District Presidents Association, recently gathered significant input on the proposed UUA Ends. The Board and DPA did so, in part, through interviews with leaders of congregations and through online surveys with hundreds of members of congregations. We recommend such collaborative efforts continue next fall, to gather input on Board proposals related to strengthening General Assembly. We also recommend UUA trustees conduct interviews this spring, with members of historically marginalized groups in Unitarian Universalism. In those interviews, trustees can gather feedback on the Board's core ideas for transforming General Assembly, as developed at this January meeting.

Outside of formal linkage through interviews and surveys, we suggest trustees experiment this spring and summer with some different formats for dialogue--such as webinars with congregational leaders, and more facilitated small group discussions at the 2014 General Assembly.

We envision linkage evolving as General Assembly evolves. For instance, if delegates are given more resources to prepare for General Assembly and to discuss its governance matters in their own congregations, they may be better able to speak for their congregations. As those marginalized--by identity, economic resources, age and abilities--have greater opportunities to participate in General Assembly, more sources of authority and accountability might be heard at our gathering. So this plan contemplates

dialogues at General Assembly that one could say aren't yet "true linkage"--delegates and attendees may not clearly be speaking for their congregations or otherwise clearly identified as a specific "source of accountability and authority". Yet these dialogues may lay groundwork for ways in which UUA trustees can link with delegates on questions that matter to our movement.

We also recommend, as part of a communications plan, Trustee presence (whether virtual or actual) at District and Regional Assemblies. We suggest the Board provide a report of its governance work to District and Regional leaders prior to their spring assemblies.

1. Proposed Linkage in 2014

In 2014, the Board will be creating proposals intended to strengthen how Unitarian Universalists govern and gather at General Assembly. Part of that discussion will focus what processes best fulfill the governance purpose of General Assembly and open up avenues for engagement by all delegates. Given that discussion, we recommend the following:

- a. UUA Board Linkage with Youth and Young Adults and Historically Marginalized Groups Throughout Unitarian Universalism. The Board, in its 2010 "Transforming Governance" resolution, agreed that reform efforts would include "[e]ngaging youth and young adults and historically marginalized groups throughout Unitarian Universalism, to ensure that their voices are heard in our governance transformation."

We recommend trustee linkage efforts from mid-February through mid-April focus on interviews with members of at least the following groups:

i. DRUUMM

ii. LREDA

iii. TRUUST

iv. EQUUAL ACCESS

v. INTERWEAVE

vi. UUWF

vii. JTWTC

The Linkage Working Group will provide trustees with interview questions regarding the Board's ideas developed at the January meeting for transforming GA, a facilitator's guide (as in the *Healthy Congregations* project), and suggestions of who may be interviewed. Interview sessions will take about one hour. Two trustees will be assigned to each group, so trustees will may be asked to conduct one or two sessions between mid-February and mid-April. (Results can be submitted via a Survey Monkey site.)

Also, we recommend that Trustees and District/Regional Presidents engage with the Youth Caucus and Young Adult Caucus on similar questions, through World Cafe sessions at General Assembly.

b Webinar Discussions with Congregation Presidents and Ministers. We suggest the Board consider, in early May, holding a webinar in each UUA Region for ministers and congregational leaders. These webinar sessions would educate them about the

governance work of the Board and proposals to be discussed at GA and might encourage discussions within congregations prior to General Assembly.

c. Information Before GA and UUA Board of Trustees/DPA Conversations at General Assembly. We suggest the Board recommend on the GA webpage, prior to this year's GA, a few brief readings selected by Rev. Dr. Susan Ritchie. Those readings would relate to the history of governance and gathering at General Assembly. The hope is to make the question of "transforming GA" a little more engaging. (Of course, this isn't of much benefit if the readings aren't easily accessible to people.)

At General Assembly, during the business session, participants can break up into smaller groups (as at GA 2013) to reflect on 2-3 questions related to proposals for transforming GA. These sessions can be led by both trustees and District/Regional Presidents and leaders, with fairly simple instructions for facilitators. While participants could again use Twitter to record and share their thoughts, we recommend that facilitators record key points in the discussion, with his or her own observations, and submit those notes and observations via a Survey Monkey site.

d. District/Regional Linkage with Congregations/Survey. This year, linkage efforts with congregations will likely be most effective after October 2014, when the UUA Board of Trustees has further refined details for a proposal on transforming General Assembly. We recommend each District/Regional board assist in linkage with at least 5 congregations in its district or region. The Linkage Working Group (as it did in the 2013 *Hearing Voices* project) will provide guidelines for choosing congregations, as well as

linkage questions and instructions. Linkage can be conducted in November, December, and early January, with results reported before the January Board meeting. An online survey in November can provide additional feedback from youth and young adults, as well as members of historically marginalized groups and unaffiliated Unitarian Universalists.

e. Engagement with Additional Sources of Authority and Accountability. The discussion above outlines a linkage plans that connects, in some way, with congregations, Beloved Community and current and future generations of Unitarian Universalists, as well as the heritage, tradition and ideals of Unitarian Universalism. The Board will continue to have time at its meetings dedicated to worship and vespers and connection to the Spirit of Life, Love and the Holy. Because we are linking this year on the subject of General Assembly, we might reserve time at the April Board meeting to experience moments music, worship and words at past General Assemblies that have evoked such spirit.

2. Trustee Presence at Regional and District Assemblies and Reporting to Congregations the Overall View of UUA Governance and Work of the Board of Trustees

The May 2013 Joint Task Force Report on District-UUA communications recommended trustee presence at least at regional meetings, noting that even electronic communications don't substitute for in-person conversation. That need for in-person conversation, while important, needs to be balanced with our change is governance,

where trustees are not representative of a particular district. Recognizing that trustees may well wish to attend an assembly within their own district, we also recommend trustees attend assemblies outside their own district. Trustee presence at district and regional assemblies can be a time for relationship-building and learning. This year, we recommend trustees report on the governance work of the Board of Trustees work by:

- a. A written report to District and Regional Presidents and UU religious professional organizations from the Board, prior to commencement of the first District Assembly on March 14 (Pacific Northwest),;
- b. . An electronic version of the report (video by several Board members) for use at District or Regional Assemblies when Board members cannot be present
- c. Trustee presence at most District and Regional assemblies, recognizing schedules may not permit presence at each assembly. We recommend that Trustees use this time to hold a simple reception, review highlights from the Board report, discuss the upcoming General Assembly, and simply have time to meet with people. The Linkage Working Group can suggest an agenda for those meetings and a summary of the Board's work, so that Board members are sharing the same information.

While not all Board members may not be able to be present at each District Assembly, we recommend presence at the following joint and regional assemblies:

- i. Ohio Meadville/St. Lawrence Joint Assembly (March 28-29)

ii. iii.. Southern Region--presence at one of following (and a video message by the Board for all districts in the Southern Region):

Florida (4/25-27) Vero Beach, FL

Mid-South (4/25-26)

Southeast (4/25-26) Raleigh, NC

Southwest (4/25-27) Dallas, TX

iv. Mid-America Region (Skype or electronic presence due to UUA Board Meeting on same dates (April 11-13)).

Attached is a summary of current plans of trustees regarding attendance at assemblies.

On January 13, Lew Phinney, Michael Sallwasser and I will be speaking by teleconference with the District Presidents of the Pacific Western Region, updating them on the new Board's governance work and linkage plan discussions. To the extent we receive comments on or ideas for linkage and communications, the Linkage Working Group will bring those to our January discussion..

