

President's Report

To the UUA Board of Trustees

January, 2014

Peter Morales

Introduction

In this report I am more interested in enriching a conversation than in conveying information. This report, then, is not a typical president's report. I want to provide context for our discussion at this board meeting of the administration's interpretations of the ends policies and the monitoring of those policies.

Much of what follows will sound familiar. I have tried to bring together in one place the key values, convictions, assumptions, theory of change and strategic thinking that shape all the work of this administration. These have been expressed in a number of documents and orally.

We are blessed as a religious movement in that we do not really have major disagreements about our values and purposes. We do not have the rancorous conflict over ordination of women, acceptance of LGBTQ people, interpretation of sacred texts, the validity of science, etc.

More importantly, we share common aspirations. That is the core of who we are as a religious people. I believe it is important to remember our common core and how much consensus there is regarding it. We have a new set of ends policies, yet our values and hopes have not changed. Our ends policies are, necessarily, imperfect and incomplete attempts to express our aspirations. Each attempt to capture them will be different, but the core values endure. Ends statements are like different descriptions of the same mountain.

What follows is a distillation of this administration's core convictions that underlie all our interpretations, our views on our strategic situation and the role the UUA staff can play, our belief in what strategies will move us forward, and a very brief summary of the major initiatives that we have undertaken and that are in process.

Core convictions

People are by nature religious creatures

Human beings have a profound longing for meaning and for connection to ideals and purposes that transcend their lives. We are relational creatures who find and create meaning in relationship.

Love in community is the core of Unitarian Universalism

Compassion. Community. Commitment. Love transforms lives. This sense is expressed in a number of ways: the Christian ideal of "The Kingdom of God" and the modern variation we call "The Beloved Community."

Justice is love made manifest in society

Our spirituality, founded upon compassion, inevitably finds expression in both acts of charity and in public advocacy.

Religious experience involves our whole being

Religion is not about being correct. Religion involves both intellect and affect. Religion must be *experienced*.

The religious impulse is fundamental, but religious expression changes

Religious expression lives in real cultures at real times of history. What is compelling in one era is empty in another. The ability to see and embrace new possibilities has always been part of the genius of Unitarian Universalists.

We live in a time of historic religious upheaval

By measures of religious identification, we have seen more change in religious affiliation in the last ten years than in the previous two hundred years. One needs to look at periods like the Reformation, the rise of Islam, or the rise of early Christianity to see comparable change.

Unitarian Universalism must change profoundly to adapt

The culture is changing so fast that we must adapt. The changes we must make are not “technical” (minor problem solving adjustments in existing practices), but are adaptive (major cultural change). I have tried to distill the culture change we need to make as the need to:

- Get religion—this includes spiritual practice, spirited worship, taking ourselves seriously, making commitments, and everything we associate with a vibrant faith.
- Grow leaders—movements need leaders. We must learn to identify, nurture, mentor and empower both lay and ordained leaders.
- Cross borders—this involves crossing the barriers of culture and class that have confined our movement. AR/AO/MC is part of this, but so are things like the College of Social Justice and forming grass roots partnerships.

UU's align theologically with the emerging culture

The emerging “millennial” culture shares many of the core values and orientations of UU's. On issues like marriage equality, the environment and inequality we align. We also align in our acceptance of the value of many sources and many traditions.

UU's do NOT align with the emerging culture institutionally

While the *content* of our religious values aligns, our *forms* do not. Traditional church is not appealing to millions who are in other ways kindred spirits.

Our people have the talent, the passion and idealism to adapt

We have fabulous leaders. We have passionate, committed and idealistic people. We have congregations that are doing amazing work.

How organizations change

Sense of urgency

Urgency is not panic. A sense of urgency is an internalized, emotional and intellectual realization that profound change is needed and that we are capable of making the changes.

Shared vision of what is possible

Change at the cultural, adaptive, level can only occur if people share a vision of where they are going. In a democratic faith like ours, this kind of shared vision must come from a process of deep discussion.

Culture of collaboration and cooperation

Organizations that use the talents and the energy of their people will prosper. An organization like ours overflows with talent. The challenge is to get our people to work together. Our culture of individualism must be tempered with a culture of collaboration.

Empower leaders

Our deep suspicion of authority, born in our roots in the Reformation and the Revolution, too often this means that we disempower everyone and call that democracy. Effective organizations learn how to nurture leaders, empower them and also hold them accountable. The key is learning to win trust and how to give the gift of trust to others.

The role of the UUA staff

The UUA staff must lead change

It is clear that the majority of our people realize that we must change, want to change, and look to the UUA (and the UUA president) to lead change. We must cast a vision and implement programs consistent with that vision.

The UUA must cast a vision

We must be what I have called “prophets of the possible.”

The UUA must nurture a culture of collaboration

At one level, we must be the change we hope to see. We must model collaboration and partnership.

The UUA must be a powerful public voice for our shared values

Public witness, especially at the national and international level, is something only the UUA can do effectively.

The UUA must do what individual congregations cannot

This includes excellence and efficiency in everything from financial services (endowment management, insurance) to credentialing of religious professionals to ministerial transitions to resource development to General Assembly. This includes the majority of the UUA's day to day work.

Major strategic initiatives

With all the above as context, I would like to highlight just some of the initiatives of this administration. This is to show the alignment of our programmatic work with our core values, our strategic vision, and our understanding of how organizations change.

All of the following activities exist to further our shared ends. They are all in harmony with both sets of ends the board adopted. However, one of the governance challenges of the past four years has been how to link our strategy and our programs with the ends. This is in part because the major initiatives (ministerial leadership development, for example) affect *all* of the ends.

A quick glance at our major initiatives shows how they align with our deepest religious values, assessment of our situation, and our beliefs on how the UUA can best lead change.

A selection of major initiatives

- **Strategic Review of Professional Ministries**—this review and report has shaped a great deal of work in ministry. This includes an unprecedented level of collaboration with the UUMA in developing ministerial excellence.
- **Leap of Faith**—This is a program, largely designed by ministers of growing congregations, that involves mentor and learning congregations.
- **Congregations and Beyond**—This is a set of initiatives aimed at shifting our focus toward reaching beyond existing congregations to include new forms of community and people who are not now members of our congregations.
- **UUSC and the College of Social Justice**—The relationship between the UUSC and the UUA has attained a new level. Our College of Social Justice joint program is giving opportunities for direct experience with other cultures.
- **Regional Cooperation**—Field staff have long a complex relationship between the UUA and their district boards. The district isolation of staff has also limited the synergy and innovation of collaborative work and specialization.
- **The move to 24 Farnsworth**—We have been housed in facilities appropriate for a nineteenth century organization. The pending move is all about culture change at the UUA.
- **Interfaith partnerships**—We have attained a new level of partnership with the United Church of Christ and are developing a relationship with the Union of Reform Judaism. Our public witness work in areas such as immigration involve interfaith partnerships.
- **From resource development to curation**—We are moving from having UUA “experts” who develop resources and programs to a staff that sees themselves more as “curators” who share exciting new resources and programs developed in the field. This is all about using the creativity and talent of our people across our movement.
- **“Branding” and communications**—We are in the midst of a major overhaul of our communications. The shift is to more interactive media and to reaching out to those outside

our movement who share our hopes and values. We are also looking to change the nature of our interaction with UU's from developing products they passively consume (UU World, pamphlets, Skinner House books) to direct and interactive contact using electronic media. You will hear much more on this in the coming months.

- **Entrepreneurial ministry**—In collaboration with the UUMA and leading business school faculty, we are developing a training program in that will help our creative ministers be effective innovators. Again, there will be much more on this in the future.

Concluding reflection

This administration has achieved historic levels of partnership with the UUMA, the UUSC and leaders of other faiths. These partnerships have opened new possibilities. I look forward to building a such a partnership with the Board.

In our ongoing discussions about the mechanisms of governance such as the interpretation of the ends policies and the metrics of monitoring, I pray we do not lose sight of our shared aspirations. Being faithful to those aspirations is what it means to be a people of faith. Faith is not belief in the truth of a set of theological propositions. Faith is a *relationship*; it is about being faithful to what we hold precious.

The challenges and opportunities before us today are enormous. We can only meet these challenges and seize these opportunities if the board and the administration work together. We can become what we are called to be only if we are partners.

I sense a new spirit of collaboration among us. Let's roll up our sleeves and do the work of governance. As we do this work let's remember that we are all committed to being faithful to our religious vision and that we can only be faithful if we work hand in hand.