



TO: Members of the UUA Board of Trustees
FROM: Amanda Trosten-Bloom, Principal
RE: Proposal for Congregationally-Based Appreciative Inquiry (CBAI)
DATE: November 12, 2010

Overall Purpose:

- Inform and deepen our collective understanding of congregational values and aspirations.
- Develop a compelling shared vision for the denomination's future (also known as our Association's Ends), which will shape and direct strategic and operational decisions (also known as our Association's Means) going forward

Ancillary Outcomes:

- Include historically marginalized voices to help shape our Vision of Beloved Community.
- Align board and staff around a shared vision for the denomination and its future that has broad ownership among congregations, clusters and districts, and is consistent with and our Sources of Authority.
- Provide board and staff with a basis for denomination-wide decision-making and action.
- Establish healthy relationships and a strong sense of partnership among board, staff, congregations, and other accountability groups.
- Inspire hope and innovation at the congregational level.
- Enhance local and regional communication and mutual support among congregations.
- Informally support succession planning by providing unofficial opportunities for information exchange and leadership development at the local, district, regional and national levels.
- Build ongoing denominational capacity by: identifying and engaging individuals with facilitation and leadership experience; and providing Appreciative Inquiry training, apprenticeship and partnership opportunities to others who are interested.

Assumptions:

- At all phases of the process (e.g., congregational or local inquiry, cluster meetings, integration meetings, etc.), we will design around and consciously engage a variety of Sources of Accountability and Authority, including:
 - Member congregations.
 - Current and future generations of Unitarian Universalists.
 - The heritage, traditions, and ideals of Unitarian Universalism.
 - The vision of Beloved Community.
 - The Spirit of life, love, and the holy.
- We will actively engage as many congregations as are interested in and willing to participate, along with District Board representatives and religious professionals.
- The schedule and timing of activities must be organized around a variety of factors:
 - Individual congregations need to plan far in advance for time-consuming activities.
 - A longer period of local inquiry may be necessary than that is proposed herein, to enable more congregations and local groups to participate.
 - As much as possible, we wish to contain costs by minimizing staff, board and district travel beyond that which is already scheduled.
 - There are a variety of standing commitments (e.g., Justice GA, board meetings, large congregation initiative, etc.) that demand particularly high levels of staff / board time and attention.
- The Planning Team will determine the most appropriate way to share the results of the work with members of the denomination and other interested parties. (The “Justice GA” may not be an appropriate venue, in terms of both timing and content.)

Proposed Steps:

Proposed Steps	Responsible Persons	Time Frame
1. Identify a <i>Project Leadership Team</i> : 3 to 4 “executive” sponsors who are representative of the whole (e.g., UUA President or designated alternate, board moderator or designated alternate, and a representative from MGW and UUMA and who will identify and recruit Planning Team participants.	Identified by Peter and Gini with Amanda	Nov.-Dec. 2010
2. Identify a <i>Planning Team</i> : approximately 16 people: a microcosm of the 200-person staff, 24-person Board, UUMA, District Presidents’ Association, and historically marginalized people.	Project Leadership Team with Amanda	Nov.-Dec. 2010
3. Develop an <i>Inquiry Strategy</i> : purpose, goals, approach, timeline, implementation strategy.	Planning Team with Amanda	Jan. 2011
4. Begin publicity to staff, local congregations, district boards, etc. to recruit facilitators and ensure space and time for participation.	Project Leadership Team and Planning Team	Feb.-Mar. 2011
5. Prepare and pilot a <i>Congregational Inquiry Packet</i> .	Amanda with Planning Team subgroup	Mar.-May 2011
6. Develop, promote and implement a <i>Train-the Facilitator</i> program by which the <i>Congregational Inquiry</i> will be implemented. District staff will help identify potential facilitators, which may include members of the denomination with prior AI experience, District Board members, District Staff, and others to be determined.	Amanda with support of Planning Team and subgroup	May-June with refresher in Aug. 2011
7. Denomination-wide <i>Introduction to CBAI</i>	TBD by Planning Team	At or close to GA 2011
8. Conduct <i>local inquiries</i> in congregations and possibly other local groups (identified by the Planning Team, to assure that all Sources of Accountability and Authority will be heard)	Remote facilitators with support from Amanda and Planning Team subgroup	Sept.-Dec. 2011

<p>9. Design and conduct <i>Cluster Meetings</i> (3 to 5 congregations per cluster): share and make meaning of stories, identify patterns and themes, articulate congregational values, strengths and opportunities, hopes and dreams for the future</p>	<p>Amanda designs. Pairs (district board and staff combinations) facilitate.</p>	<p>Jan.-Feb. 2012</p>
<p>10. Design and conduct <i>Integration Meetings</i> at either the district or regional level: articulate <i>shared</i> values, strengths and opportunities, hopes and dreams for the future</p>	<p>Amanda designs. Triads (Boston-based staff, district staff and board member) facilitate.</p>	<p>Mar. 2012</p>
<p>11. Design and facilitate a 3-day <i>Planning Meeting</i>: for board and executive staff</p> <p><u>Day One (board and staff)</u></p> <ul style="list-style-type: none"> • Validate and consolidate values, strengths and opportunities, as identified in Integration Meetings • Articulate a shared vision for the denomination, through which the board and staff will assist congregations and other Sources of Accountability in achieving their desired ends. <p><u>Days Two and Three (staff only)</u></p> <ul style="list-style-type: none"> • Develop strategies and operating plans (means and measures) that are solidly rooted in and responsive to the shared vision that has been articulated. 	<p>Amanda designs and co-facilitates with at least one other external facilitator</p>	<p>In conjunction with Apr. 2012 Board meeting</p>
<p>12. Disseminate and build alignment around the shared vision and strategies</p>	<p>TBD by Planning Team</p>	<p>Aug-Oct. 2012 and ongoing</p>