

UUA Board of Trustees  
Linkage with Sources, 2007-2013

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**A Brief History**

# The Early Years: 2007-2009

## Conversations at General Assembly and in Districts

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- **2007:** Used “Open Space Technology” to identify values and differences GA delegates wanted to make in the world.
- **2008:** Appreciative Inquiry session with about 500 delegates at GA. Ends, values and sources were reviewed with about 250 members of 4 New England districts. 12 of 19 district trustees held similar meetings, in person or as webinars.
- **2009:** Possible Ends presented to several hundred congregational presidents at GA. 83 responded to invitation to rank Ends, as did 56 attendees of a GA workshop.

# Approaching Congregations: Healthy Relationships: *What Were They Thinking?*

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- **A dialogue between UUA Board and 64 congregations in 2010 that asked:**
- *Who represents the congregations?*
- *What values are most important to our congregations in healthy relationships?*
- *What outcomes are important to our congregations? (The UUA Board had a set of 20 outcomes or “ends” created from hundreds of conversations with UUs over several years.)*
- *Is this process of interviews sustainable?*

# The Process of Interviewing

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- Interviewed 64 congregations by random selection method (originally selected 100)
- Originally, list of congregations divided among 23 trustees and moderator. 5 trustees did no interviewing at all
- First interviewed 12 congregations at San Antonio Board meeting, then interviews were conducted by person or phone.
- Interviews were with board president, called minister and other lay leaders as chosen by board president.

## Some Findings

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- Elected and called leadership “speaks for the congregation”.
- Personal relationships between UUA Board and member congregations are often absent--and healthy organizational relationships are built on healthy personal relationships.
- Healthy relationships require trust, honesty and respect. A healthy relationship with the UUA requires mutuality and common goals.
- Congregations would like more personal 2-way communication with Board; willing for it to be electronic.
- Process of face to face interviews is not sustainable.

# Recommendations

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- Continue linkage in a sustainable way, with input from all Sources
- Collaborate with District Presidents' Association to continue person-to-person interviews with congregational leaders.
- Use social media and video conferencing. Emphasize respect, trust and honesty, emphasize common goals and need for mutuality and support from all parties.

## A Broader Initiative: Gathered Here 2010-12

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- A proposal to engage Unitarian Universalists, within and beyond congregations, in conversations about:
  - what “gives life” to our faith when we are at our best
  - Our hopes, dreams and aspirations for Unitarian Universalism’s future
- Planning team of 14 members included UUA staff, UUA Board member, representatives of Districts and DPA, members of UUMA and member of DRUUMM. UUA worked in collaboration with the Corporation for Positive Change.

## Its Design

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- One on one conversations
- Community conversations
- Downloadable materials with simplified requirements for participation (leading to increased participation but loss of feedback)
- 6-person Making Meaning Team
- Findings re-examined by feedback from respondents currently marginalized in Unitarian Universalism

## Its Intent

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- Develop a compelling shared vision for the UUA's future (“Ends”) to shape and direct strategic and operational decisions
- Inform and deepen our collective understanding of congregational values and aspirations

# Joining Forces: UUA/DPA Joint Task Force on Linkage 2

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- Formed in December 2012 to:
- assist Board in vetting proposed revised Ends (January-April 2013)
- lay foundation for future work on linkage with congregations by proposing partnership between UUA Board and DPA to engage district leaders in linkage with congregations
- funded by UUA Board; accountable to both DPA and UUA Board.
- at least 2 and nor more than 3 persons from UUA Board and at least 2 but nor more than 3 persons appointed by DPA. Convener to be named by UUA Board.

# The Joint Task Force and “Hearing Voices”

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- Joint Effort in 2013 of Linkage Working Group and UUA/DPA Joint Task Force on Linkage
- Identified 3 areas where Board wanted information on draft Ends; collected feedback on each policy and general feedback on what is missing and overall reactions
- DPA interviewed congregational leaders
- Unity Consulting consulted on operational definitions of sources and linking methodology
- connected with non-congregational sources through interviews, focus groups and surveys

# The Voices

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- 49 selected congregations
- Four focus groups with Youth/LREDA
- Surveys with 7 youth, 114 young adults, 81 unaffiliated
- Interviews with Beloved Community, 24 surveys from People of Color, 57 surveys from People with Challenges, 114 Surveys from BGLTQI
- 2 interviews with Heritage, Traditions and Ideals
- 317 individual Unitarian Universalists

# Linkage with Non-Congregational Sources

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- **Current and Future Generations of UU's:** “World Cafes” with Youth Caucus at past General Assemblies
- **Heritage, Tradition and Ideals:** Rev. Dr. Susan Ritchie
- **Vision of Beloved Community:** Meetings with community organizations and partners outside of the UU community at board meetings in San Antonio, Phoenix and New Orleans
- **Spirit of Life, Love and the Holy:** Opportunities created at board meetings by Linkage Working Group and Board Worship Teams

# Linkage Working Group Recommendations for Down-Sized Board

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- Administrative staff support
- Skilled volunteer

## We Are Grateful

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- To Linda Laskowski and members of the Linkage Working Group, and all who created the rich resources that formed this narrative and help us do this work.