

To: Congregational Professional and Lay Leaders
District Presidents
cc: Participants in Orlando
Staff and Board Members of the Southland Districts
Southland's UUA Board Trustees
From: Presidents of Southland Districts
Date: January 11, 2011
RE: Distribution of The Orlando Platform

During an extraordinary meeting in December 2010, the Boards of Trustees of the four districts of the Southland Region came together to consider the challenges our faith faces and to begin the conversation about overcoming those challenges.

The attached document, dubbed "The Orlando Platform," is a statement of the consensus at which we arrived. It is a statement of commitment. It does not prescribe specific actions, but instead commits us to working together to develop organizational and governance strategies that will strengthen Unitarian-Universalism congregations and communities.

We are not alone in this work. Other regions are also examining ways to restructure their governance and service-delivery systems. We will learn from one another.

In the words of The Orlando Platform, "Though not all the answers are yet clear, we proceed in faith and in covenant with one another, seeking the ways to best serve and connect our congregations and districts." The work will be hard and it will take time; but it will be worth every bit of effort we put into it. It will probably not be mistake-free; but it will be well thought out and the result of the love we share for our faith and for each other.

It is in this spirit that we offer you this document, realizing it is but the beginning. What has begun here will be continued, perhaps even perfected, through the efforts of many.

We want to recognize and thank the drafters of the Platform, who captured so well the consensus of commitment their fellow board members achieved: Ila Klion, Florida District; Rev. Fred L Hammond, Mid-South District; Rev. Jonalu Johnstone, Southwest Conference; and Nathan Alan Hollister, TJ District.

We four district presidents invite you to direct questions and comments about the Orlando Platform to us. We also invite you to join us in the work that lies ahead, transforming our faith and our lives.

With joy and hope,
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The Orlando Platform

Preamble

We as the Unitarian Universalist Association have maintained the same numbers of members nationwide since our merger in 1961. However, the percentage of our membership has shrunk over the last fifty years when compared to the population growth of the country. The Unitarian Universalist Association has been impacted by this stagnation of growth and is on a path of streamlining its governance in order to be proactive in its decisions for our future.

Our faith is not growing, and we are not doing what is necessary to enable ourselves to have an effect on the world. The question arises: *Are we going to disappear, to continue to stagnate, or to transform the world?* The Cambridge Platform, written in 1648 as a guide for how we conduct ourselves with congregational polity, had two major themes or directives: That each congregation makes its own decisions and calls its own leadership; and that congregations cooperate with and be accountable to one another. It seems that our Association has gotten good at doing the first of those. What is now needed is a maturation of our Association in embracing the second.

Purpose

The Boards, Staff, and Trustees of four UUA districts came together in Orlando, Florida, on December 3-4, 2010, in an historic and amazing meeting to consider governance questions, and more fundamentally, how we wish to structure the relations among our congregations. The districts involved ó Florida, Mid-South, Southwestern Conference, and TJ ó comprise the Southland Region of the UUA. Consultant Joe Sullivan led us through this weekend.

Our stated objectives were to:

- ✦ Consider how to best serve Unitarian Universalism, the congregations and Unitarian Universalists, both present and future, in terms of structure, governance, service, and language.
- ✦ Examine how to stay in relationship with each other, with our congregations, with staff, with Unitarian Universalists.
- ✦ Build working relationships among the Boards of the four Districts and build a sense of religious purpose for the work.
- ✦ Develop a common sense of the issues and opportunities facing Unitarian Universalist leadership reorganization, governance and service delivery throughout the system.

- ✦ Identify the possible changes in organization, governance and/or service delivery necessary to best support our congregations in their mission.
- ✦ Determine the next steps required to make those changes

Through small group conversation in mixed groups and with their respective boards, participants engaged in the religious work of examining our connections and determined the time was right for making major changes in our governance systems. Though not all the answers are yet clear, we proceed in faith and in covenant with one another, seeking the ways to best serve and connect our congregations and districts.

Themes

Through our conversations with one another several recurring themes emerged which although not unanimous, were widely agreed upon. These themes, in no particular order, were:

- ✦ There is duplication of effort in governance that is not serving our members, our congregations, our districts, or our faith well. There is much confusion on who and what we are governing. The roles of the District Board and the UUA Board of Trustees are unclear, but it appears that both governing bodies are trying to govern the same systems. Thus, too much of our resources, both financial and human, are being expended on a governance system that is ineffective.
- ✦ Lines of communication, though not broken, need much improvement. District boards need to talk with and listen to our members, our congregations, our ministers, affiliated organizations, district and UUA staff, other district boards and the UUA Board of Trustees. Moreover, our members and member congregations need to talk and listen to each other, their district boards, district and UUA staff and the UUA Board of Trustees. We believe that these communication issues have led, in some part, to a breakdown of trust which needs to be healed so that collectively we can move forward, grow our impact in the global community and get on with the work of our faith: nurturing spirits and healing the world.
- ✦ Through deep conversation and listening, we need to develop the covenantal relationships which are the cornerstone of our polity. Congregations must be in relationship with and accountable to one another and the larger Unitarian Universalist world. Conversely, the UUA must be in relationship with and accountable to the individual congregations. It is imperative that we work collectively to put our faith forward, loving the faith more than the argument; so that we can do the religious work that we are called to do. In doing this work we will focus outside of our walls into the larger community where people are lost, hurt and wanting. We will carry our Universalist message that you are loved,

loveable and lovingö outside of our doors and into the world.

✦ Congregations create good leaders. Many of these leaders, in time, move out of congregational leadership as their faith calls them toward fulfilling the larger Unitarian Universalist mission. We must provide a mechanism to hold, nourish, and respect these elders; allowing and aiding them to be of meaningful service to our faith.

✦ Regionalization is important to the larger movement in creating an economy of scale and in sharing resources across the districts of the region. Of equal importance there is a need for some intermediate structures formed in a covenantal manner to provide cultural understanding for individual geographic and demographic areas, delivery of services, and a focus on what pulls at the heartstrings of a particular region. Moreover, there is a need to build strong öClustersö where the focus can be on particular needs and where congregations can build covenantal relationships of accountability.

✦ Increased democratization of our organizational structures is needed. It is a religious imperative that ours be a democratic faith; we have work to do in order to fulfill that charge. The work before us includes focusing on linkages between the various entities that make up our faith, opening up space for the inclusion of voices unheard, and ensuring the full engagement of one another in the ongoing process that is Unitarian Universalist faith and practice.

Governance

We came to an agreement on our definition of governance: a governing body that on behalf of some group performs these three functions: Setting direction, granting power to go towards that direction, and verifying performance in light of the named direction.

The Unitarian Universalist Association Board of Trustees has as its sources of authority and accountability the following:

1. Our member congregations
2. Current and future generations of Unitarian Universalists
3. The heritage, traditions, and ideals of Unitarian Universalism
4. The vision of Beloved Community
5. The Spirit of life, love, and the holy

This board is elected by the congregations. It was the consensus of the four district boards that there be only one governing body elected by the congregations. The UUA has established ends which it will pursue in accountability to the sources of authority. The districts chose to suspend the districts' ends in favor of the association's ends. Further the districts chose to re-align district staff to be employees solely of the association and not co-employed, empowering the UUA to direct the staff towards the completion of its ends

which were developed by congregations through the General Assembly.

There may be other ways for Districts to foster Unitarian Universalism within their area without duplicating the efforts by being another governing board. It is the belief of these districts that we are re-engineering the spirit of the Cambridge Platform for the 21st century and beyond through this ongoing work.

Possible Visions

Many questions remain about how to make these changes. We must create solid opportunities for leadership and leadership development at all levels of our Association. We must create ways for a single governing board to be democratically informed in its formation of ends and policy, and to be democratically accountable for those ends and policies in action. We must seek out and define what we can gain from an Elder model of leadership, as was the way of our Congregationalist forebears

Moving forward requires a discussion to unfold on how congregations are to fulfill the other half of the Cambridge Platform: To walk with each other, cooperate among congregations, to engage in multi-congregation projects, to hold each other accountable when we are operating without regard to our agreed upon principles. Through this our expectations can be raised of what can spring from our religious association, and gain a more focused, confident, and forward-thinking perspective. We can perhaps have the courage to look outside ourselves and to the larger community, replacing insularity with engagement, and autonomy with principled cooperation. There are also practical discussions regarding financial and resource equity across the districts; about UUA and District dues structures; and regarding the fiscal responsibilities of district owned assets and liabilities.

Districts have a role in the region in continuing the cultural understanding of a particular area to the association. In partnering with the UUA, Districts will empower the Association to reach its desired ends within a specific locale. Moderator Gini Courter said, "Let's not put people passionate about Unitarian Universalism on [a district] board but put them in outreach and as a witness to the faith."

There are many ways to envision our next evolution of locally organized Unitarian Universalists. The role of Clusters and elders received attention at the meeting, so deserve attention here, though mechanisms have not evolved for implementing the ideas and themes expressed. Districts have a special opportunity to foster strong clusters that are in relationship with one another and that hold each other accountable to our sources of authority. Our congregations have the ability to create the change our faith calls us to see in the world only if they are in relationship with one another and are held accountable to each other. A Cluster can be defined along geographical or affinity lines to enhance the lateral relationships between congregations. A geographical Cluster would be the congregations within a city or state or region. An affinity Cluster would be any two or

more congregations that are similar in size or in governance structure, or congregations that choose to collaborate on a mutual issue or concern such as social justice. Clusters can formalize cooperation and share skills and knowledge on congregational life issues such as growth, leadership development, or stewardship. Models of geographical and affinity Clusters are already being developed within the Southland region and within our Association. Districts are in a special position to support these Clusters to form covenants of relationship with each other, share resources, support each other, and consult with their congregational elders on common concerns. In this way, Districts would foster a shared ministry approach within the district between and among congregations, enabling our faith to become more than just the sum of our parts. Districts could encourage congregations to not sit on a franchise simply because the congregation made decisions regarding their desired size, but rather seek to inspire the formation of additional congregations in locations where our faith has the potential to expand its presence.

The District boards could evolve from their current role of providing programs or developing policies to being a council of elders of the faith. Elders in this context are individuals who are recognized for their leadership skills, spiritual maturity and who practice healthy congregation behavior. Elders in this sense would not be restricted to any specific age, for all ages are capable of expressing leadership skills, spiritual maturity and healthy behaviors within their life experiences. Districts would have a vested interest in developing elders within their congregations through mechanisms already in place and in the creation of new models for leadership development and through regional mechanisms such as the Leadership Experience models. Youth leadership development opportunities are vital in the development of elders across the spectrum of congregational life and should be a prominent part of this effort.

Elders could be elected by the congregations to assist the UUA and UUA staff in fulfilling the ends mission of the faith. They could be witnesses to the faith, charged with outreach to support the growth of Unitarian Universalism within the district, the region, and beyond. They could be a body of volunteers to augment the programs delivered by UUA staff. A way of speaking of this is to call it a *shared ministry*, and that concept can serve to make us more clear on our role as leaders or Elders, and frame how we can serve our faith and each other. The Elders could be empowered to hold congregations accountable when operating without regard to our stated principles as part of our covenantal congregational polity and support elected elders. Equally, they could be empowered to lift up what is working in our congregations and assist in sharing the wisdom learned. This council would strengthen mutual linkages between the congregations and the UUA Board through their consultation with district staff and through their relationship with congregations. This council of elders would lead conversations in congregations about covenanting together as a cluster of congregations, as a district, as a region, as a people of liberal religion to grow as a faith community. The decision to nurture our spirits and heal the world is larger than any one congregation; it requires a covenant between and among congregations.

Next Steps

1. We need to maintain the spirit and identity of Unitarian Universalism, inspired by the Cambridge Platform and all those who have brought us to where we are today.

Recognizing that the outcome may be different from what we envision today, we will continue the work, grounded in covenant and democracy.

2. It is crucial that we invite the leadership of the congregations to join in the discussion *and the work* of making the changes necessitated by our need for growth, relevancy, and spiritual deepening. The District boards are encouraged to be discussing these concerns with our congregations.

3. As Board members we might benefit from seeing ourselves in the role of community organizers, wherein our job is to organize ourselves out of the job. This means the creation of other roles and structures at an intermediate level that serves our congregations and the wider world better than the current Boards do.

4. We must ensure that programs and special projects don't fall through the cracks. We need to think about how our staff will be affected and how their skills and time can be utilized most effectively. There is a saying from various social movements that can be a watchword for us: "Those who have principles but no programs, turn out in the end to have no principles." We must be up to this challenge.

5. District Board Presidents from Southland will follow up with their counterparts in other regions, informing them of our positions and encouraging further conversation.

6. A primary pursuit is to formalize Cluster relationships, possibly along the lines described above. In this process we want to bring congregations along in thinking about how our faith is to develop in the future. We want our congregations involved in supporting the democratic process that this work will entail.

7. We will be looking to strengthen our leadership. This means both increased opportunities for leadership development, and increases in the positions of leadership that are available. This includes creating a plan of support for youth and youth programming, as youth leadership opportunities are of vital importance if we hope to retain our younger people and to have a future as a faith. We will look at creating intentional structures for identifying leaders, with emphasis on operating through the lens of anti-racism, anti-oppression, and multiculturalism.

Closing

Collectively we feel good about where this discussion is leading. There was a broad acknowledgment that all of these concepts are *in process*, and that many more voices are needed in order to move us forward. In this we are excited about what these changes can do for the growth of our faith, and moreover to strengthen its ability to affect spiritual transformation, to build authentic community, and to change the world.

What we are really talking about is *relationships*. How are we to be in relationship between and among congregations? In Clusters, Districts, and Regions? How are we to be in relationship with the UUA? We need to ensure linkages with each other are strengthening to grow our faith and impact on the world. This calls for an immense amount of creativity and ingenuity in the creation of truly democratic structures. It also requires that we are diligent in our work to bring in voices from the edges, and from those that have not been heard.

Are we going to disappear, to continue to stagnate, or to transform the world? This remains an important question. Gini Courter said to those gathered in Orlando, “We don’t have 10-20 years to get this right. Let’s not put people passionate about UU on the board but put them in outreach and as a witness to the faith. What is your dream? What if we gave you money to do amazing things? Get in touch with what makes your heart sing? What ministry are you called to? And what would it take to have that kind of amazement and energy and ministry? What is better ó what we do now or what we could do then? This is the conversation.”