

*International Unitarian/Universalist and Free Church Collaboration*

**A New Vision**

*~ UPDATE ~*

*April 2021*

from

International Council of Unitarians & Universalists

*AND*

Unitarian Universalist Partner Church Council



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## Introduction

Dear Members and Friends of ICUU and UUPCC,

While the spread of COVID-19 has wreaked havoc and chaos in the lives of many, the virus revealed and worsened longstanding and punishing inequalities, disparities and hardships for the marginalized on planet Earth - many of whom already face significant challenges of climate change. Much has been suggested about the shape of things to come in a post-pandemic world.

After fourteen months of anticipating a tomorrow that is coronavirus free, let your anticipation carry you to a place of promise that embraces a new model of international engagement for our organizations, a model and organization that acknowledges and learns from the lessons of this era:

Visualize a broader, more inclusive, and equitable partnership network that is free of a constraining hierarchy so as to be more nimble, flexible, and adapting;

Think what it might feel like and what it would mean to welcome to the partnership table adults and youth who have been unable or reluctant to share the meaning of their faith;

Conceive of on-going opportunities to share your faith identity in theologically diverse groups composed of international partners;

Picture leadership and mentoring programs in cross-cultural contexts where English and western values are no longer the “ticket price” for admission and participation;

Dream about regular opportunities for worship and spiritual formation circles composed of and led by international partners;

Envision a cooperative and covenanted global justice voice that honors and addresses the needs of partners;

Imagine a new endeavor that is fully funded and has a broad, sustainable, and eager network of volunteers.

The powerful, challenging forces shaping our pandemic era created a “*kairos* moment” for us in which to imagine, dream, and envision; this is the right and opportune moment to boldly and enthusiastically reinvent and pivot to a place that engages our domestic and international partners and partners-to-be in creative and imaginative conversation, leadership, planning, and action. Now is the time to move forward and name our “collective effervescence”—our group excitement, passion and thrill—for the promises of our shared faith. French sociologist Émile Durkheim used this term to describe an event that excites individuals and serves to unify the group.

We share this update in the spirit of hope and promise. We thank you for the opportunity and for your support.

In Faith,

International U/U Collaboration Group Co-Conveners

Morgan McLean, UUPCC Board Chair [[morganmclean@gmail.com](mailto:morganmclean@gmail.com)]

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## 1. The Work of the Group

The International U/U Collaboration Group began meeting twice a month in March 2020. Our conversations have included the UUPCC and ICUU membership and the leadership of the UUA.

As a group, we have explored our own personal, ethnic, national, and spiritual truths. We remain committed to a vision of a collaborative international U/U and Free Church (U/U FC) community. This process has been longer than we expected, and we are committed to taking the time needed to build trust and to seek input. We are in a moment of transformation, committed to a new way of being for which there is no blueprint, and it is good to allow time for emerging passions.

The future of International U/U FC connections is not for the International U/U Collaboration Group to decide and we have spent extensive time exploring a variety of possibilities based on our knowledge of and experience with U/U FC connections.

We hope our members will use this document to explore and discuss the implications, questions, and to provide feedback regarding the content of this update.

### Points of Common Agreement

#### *What We Have Learned is Needed*

We have heard, and learned through experience, the need for:

- Mutual Partnership | Relationship | Connection | Support
- Theological and Spiritual Development | Education | Resources
- Capacity Building | Organizational Development
- Deeper engagement across and within U/U FC communities (individuals and groups)
- Opportunities for global engagement and inclusion

#### *Social and Organisational Realities*

We recognize several social and organizational realities

- The current structures of ICUU and UUPCC are not financially sustainable within five years' time, or even sooner.
- The power and influence among the international U/U and Free Church community has sat with the larger and better materially resourced U/U FC organizations.
- The expanding access to, and capability of, technology can provide more equitable access to community connection.
- The climate crisis and our religious/spiritual obligation to minimize our impact on the global environment and to reduce our use of precious, limited natural resources; thus reducing international travel is essential.
- A new organization will need to focus on creating an equitable organizational model structure that recognizes and accounts for the differences in capacity and resources among U/U FC communities globally

## **Aspirations for the future of International U/U Collaboration**

### *Type of Organisation*

This could be a new type of organization:

- Diverse, decentralized, with an accountable governance and leadership structure
- A community with a shared faith identity and diverse theologies
- Equitably and sustainably financed
- Provide a forum for developing a global and collective voice on issues of importance in our communities

### *Potential Work of Organization*

The work of this new organisation could:

- Broaden the meaning of partnership, grounded mutually in relationship, through establishing new systems of building partnership and relationship
- Train lay and professional religious leaders, with culturally adaptive education and training programmes
- Provide a forum for culturally relevant justice-based initiatives
- Support existing and emerging groups
- Support and build strong and mutual partnerships

### *Potential Challenges Needing Attention*

- Repeating and recreating existing models and patterns of organizational structure that (do not) reflect the reality of imbalanced power and influence within the U/U FC global community
- Unintentionally excluding stakeholders who are not usually included
- Establishing a system that disproportionately allots funding and decision-making power to the “powerful” without also establishing a system of accountability to those whom the decisions are meant to serve
- Losing the trust that already exists between current participants and stakeholders
- How do we ensure impact from our international work?

## **Stakeholders and Advisors**

### *Conversations and Input*

The next layers of conversation should be opened up more broadly with focused conversations with:

- Membership of both UUPCC and ICUU
- Seminaries / theological education training centers
- U/U FC communities with less financial resources
- U/U organisations with international components
- Individuals, emerging groups, congregations, judicatories, or affinity groups that desire to be included in communications and decision-making
- International youth programs

## 2. Possible Governance Structures

We have identified three options of potential organizational structures for the new international U/U FC entity, to be used at least during the time of transition. These are not all mutually exclusive; they could relate to and evolve from one another over time.

### Governance Questions for Consideration

Our significant, unanswered questions about Governance are:

- Whether the organization is a collaborative “project/programme” **OR** independently incorporated organisation (and where to legally incorporate)
- How to create a sustainable organizational model of leadership/accountability
- Staffing and volunteer balance/structure
- How to create a model of sustainable, effective funding
- Whether or not to be a membership organisation.

#### *Option #1: A New Organisation*

ICUU and UUPCC dissolve, forming a new legally incorporated entity. This organisation would be independent of any national body, self-governed, and self-funded.



#### *Questions and Issues to Consider:*

##### Incorporation, Governance, and Accountability

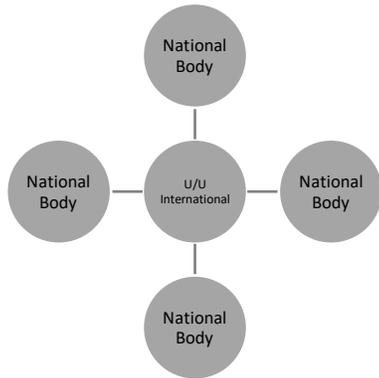
- Where to incorporate the new organization?
  - There are significant financial and legal ramifications to this issue that will directly affect how the organisation functions and the movement of funds.
- What governance structure to create?
- What form of accountability and to whom?

##### Staffing:

- If and how to staff the organization and to what degree?
- What role will volunteers play in leadership as well as day-to-day functioning?

## *Option #2: A Collaborative Project*

ICUU and UUPCC dissolve, with a few bigger U/UU national bodies forming a collaborative “project”, transferring all activities to them using a Memorandum of Understanding (MOU). The bodies participating in the MOU would have resources and capacity to administer and oversee the staffing, finances, and organizational/legal requirements necessary to fulfill the joint mission of the “project”.



### *Questions and Issues to Consider:*

#### Operations, Accountability, and Responsibility

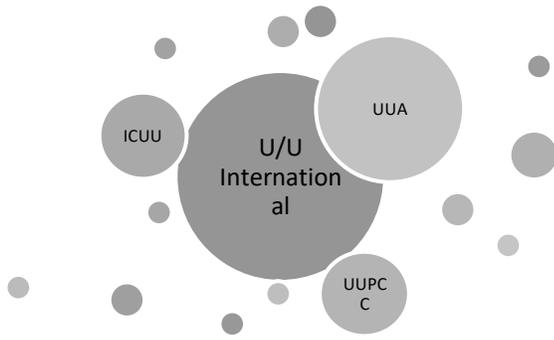
- How are the operational responsibilities divided equitably among the participants in the MOU?
- How and to whom are those participants held accountable for meeting mission and strategic goals?
- How are non-MOU communities engaged in the project?
- How do non-MOU communities’ benefit from the project?
  - How is this measured?

#### Staffing:

- If and how to staff the project, to what degree and with what oversight, by whom?
- What role will participants in the MOU have?
  - In the governance?
  - Day-to-day functioning?
  - Mission and Vision setting?

### *Option #3: Transitional Understanding with the UUA*

ICUU and UUPCC exist as temporary governance oversight only, creating a partnership agreement with the UUA and transfer all organizational activities to them, using a Memorandum of Understanding (MOU), while working to develop a new organization or a collaborative “project” of U/UU national bodies. This option is largely to allow more time for UUPCC and ICUU to complete their organisational dissolution processes.



#### *Questions and Issues to Consider:*

##### Operations, Accountability, and Responsibility

- If and how are the operational responsibilities divided among the participants in the MOU? What remains solely each organizations’ responsibilities or tasks, what is shared?
- What specific responsibilities would UUPCC and ICUU have in relationship to the work covered by the MOU with the UUA?
- What accountability would the UUA have in delivering the activities serving the U/U FC global community? By what process would accountability be measured and maintained?
- What role would the members of both ICUU and UUPCC have in determining, shaping, and overseeing the work covered by the MOU with the UUA?
- How and to whom are the UUA, ICUU, and UUPCC held accountable for meeting mission and strategic goals?
- How are non-MOU communities engaged?
- How do non-MOU communities’ benefit?
- How is this measured?
- How is this work and any staff funded?

##### Staffing:

- How to staff the work covered in the MOU, to what degree, and with what oversight, by whom?
- What role will volunteers play in the work and who oversees those volunteers?

### 3. A Question of Membership

#### Defining Membership

It will need to be decided whether or not the new entity is to be a membership organisation, and further how to define a “member.”

We see the challenges and opportunities in different models:

- If a membership model is used:
  - Who are members and how do they join?
  - What are the criteria for membership?
- If not using a membership model:
  - How to engage participation?
  - Receive support?
- How is leadership chosen/appointed/invited?

#### *Membership-based*

Similar to what exists now in both UUPCC and ICUU, there would be a transitional volunteer board responsible for mission, legal, financial, and organizational strategic direction. Staff would be employed to implement the mission through program, networking, and support. Stakeholders would be part of the organization as members and have equitable responsibilities and accountability as determined by the by-laws and policies, and would participate in determining the content of programs, services, and collective efforts. The organization would primarily be focused on meeting the expressed needs/vision of members.

The board would create criteria and a process for membership, whether national bodies, local communities, individuals, or some combination. Membership would be clearly defined with rights and responsibilities articulated and a process of accountability established.

#### Membership Models

##### *Mutual Partnership*

Each member would agree to engage in mutual partnership that would shape programs and initiatives serving the collective body of members.

##### *Networking*

The organization’s primary responsibility would be to establish lines of communication and systems of information sharing for a wide and diverse voluntary membership. The network would include as many U/U FC communities as possible and would have a responsibility of expanding the network as well as maintaining it.

##### *Peer-to-Peer*

Communities/Congregations who wish to, would agree to actively (proactively) share resources, information and collaborate and cooperate on projects, initiatives, or issues determined mutually beneficial.

## Membership Funding and Resources

Members would be required to provide resources necessary to maintain and expand the network. Each participating community would agree to also provide resources to maintain the necessary infrastructure for the peer-to-peer organization.

### *Non-Membership-based*

An initial transitional volunteer board would be appointed by current ICUU and UUPCC boards and would establish an equitable application process that would invite potential board members (representing the diversity of U/U FC communities) to complete an application and interview process in order to be chosen in line with needs-based criteria and a selection matrix. The board would work directly with staff to implement program and support in alignment with mission and strategic goals. These goals would be reviewed annually to ensure impactful service to global U/U FC communities is delivered. The strategic goals would be reached primarily through a collaborative process among staff and board with pathways of input from stakeholders.

## Non-Member Funding and Resources

Operational funding would be committed to by the bodies making up the MOU. Other sources of funding could potentially come from a scaled fee-for-service structure.

## 4. What We Have Learned About Money

U/Us around the globe are generous with their resources. UUs in the USA as well as others in the global north/global west tend to have more financial wealth than other groups, and large sums of money come from the USA and the UK to support U/U congregations and groups around the globe. The structures for how this money is distributed have not been critically evaluated.

We believe there is a pressing need to evaluate these structures and accompanying underlying assumptions in order to make relationships more equitable among the international U/U community.

### Shared Generosity and Support

- UUPCC assists with annual transfers of funds between congregations in formal partnership.
- ICUU cost-shares according to capacity for trainings, events, and programs offered by ICUU.
- The UUA has several sources of funding which support international work:
  - The Holdeen Trusts, which includes its annual funding to support the UUPCC and the ICUU as well as funding the UUA International's office.
  - The UUA Funding Panel's grants program for International UU
- We have also discovered several places and individuals outside of the UUPCC, ICUU, and UUA structures that provide funds to the U/U FC international community.

## 5. Concluding Observations and Recommendations

- Establishing a new organization is about creating an equitable organizational model structure that recognizes and accounts for the differences in capacity and resources among U/U FC communities globally.
- Continuing to dismantle colonial practices will mean evolving organisational structures and leadership. The structure and work of this new organisation can emerge with intentional conversations and curiosity as the work emerges.
- We encourage leaders of international U/U groups to engage in honest, and difficult conversations, about how money is shared among groups, and to design new systems for the equitable and transparent sharing of financial wealth.
- New leaders should be included for their passion and dedication to international collaboration, and those voices can be found beyond the current leadership structures in place.

### Thoughts to Remember

This report was completed with a spirit of aspiration toward deepening our commitments to you and to the faiths we hold so dearly, with a heartfelt wish to live into the theology and vision we profess;

The steps reflected in this report are the steps will assist in providing information necessary to engage in self-study, learning, and transformation;

Learning from our recent history, together we can keep pace with the expectations of new generations and of living our values throughout our wider communities, bringing the best of each to the other;

We are reminded: Meaningful change is hard; and we have an opportunity to transition from what we are into what we need to be.

We thank you for having faith in our efforts. We are prepared to continue this journey with you.

## Appendix

### Membership of the International U/U Collaboration Group

International Council of Unitarians and Universalists (ICUU):

Shelley Adams

Rev. Sara Ascher

Derek McAuley (Co-chair)

Unitarian Universalist Partner Church Council (UUPCC):

Rev. Roger Bertschausen (until 31 July 2020)

Rev. John Gibbons

Rev. Morgan McLean (co-chair)

Rev. Fred Muir (from 28 May 2020)

Unitarian Universalist Association International Office:

Rev. Alicia R. Forde

Robert Kipp (Administrative support)

### In Gratitude

We would thank everyone who has contributed to the work of the Group. We have been encouraged by the support of UUA President Rev. Susan Frederick-Gray and UUA Executive Vice President Carey McDonald, who share our vision of a new way forward. We would also thank the UU Funding Panel for their financial support to date, through the generous award of a grant to move us forward in this work. Responsibility for this report, however, lies with the Group.