

“Re-Imagining UUA Governance” Congregational Dialogues—Summary Report

Interview Process. Responses received (so far) were based on interviews held with congregational leaders from 40 different congregations across the 5 different Regions. A listing of congregations is attached as Appendix A. Participating leaders primarily were called ministers and Board Presidents; they also included several interim ministers and lay leaders active in denominational affairs. The interviews were conducted with the generous assistance of Regional and District Presidents and Board members in the MidAmerica and Southern Region, lay leaders and members of the denominational affairs committees of First Unitarian Portland, First UU Church of San Diego, All Souls, Unitarian, and members of the UUA Board of Trustees.

Background. Those interviewed were presented with three challenges to effective governance in the UUA. The challenges related to delegates, gathering and leadership. Those challenges are outlined on pages 2 and 3 of “Participant Materials,” attached at Appendix B.

What Did Participants Name as One Thing About GA or the Way We Practice Governance That Concerns or Excites Them?

Major themes:

- Barriers to inclusivity, particularly financial and geographic, prevent broad and diverse participation
- Delegates felt ineffective in the business sessions because information needed wasn’t communicated well beforehand, and sessions could be tedious and offered little opportunity for participation (business sessions were described as “confusing,” “draining” and “useless”)
- Congregations feel little connection to General Assembly and issues discussed—there generally has not been a process in congregations for choosing delegates; there is little discussion, if any, with delegates before they attend GA, and very little is brought back from GA that becomes meaningful in congregational life.

Several responses expressed concerns about the purpose of the UUA. Two participants commented that it was most helpful when acting its role of consulting with and supporting congregations. Another sensed ambivalence about whether “we’re a denomination or a service organization intended to provide service to congregations.” Another said, “the UUA should not be involved in developing theology.”

While there was a comment questioning whether GA was effective for social action, there were several positive comments the potential of GA for social witness/justice. The mini-Assemblies were generally viewed as a positive development. Also appreciated was the energy at GA, the time for connection with other Unitarian Universalists and within identity groups, and the shared learning and inspiration gained from GA.

What Outcomes Did Participants Most Want to See for Effective Governance in the Future?

Participants were asked to identify 3 positive statements (from the list on page 8 of the Participant Materials) that were their highest priorities for effective governance. Top priorities included:

- Increased Participation by young adults, lower income people, people of color & others whose inclusion represents our progressive future (34 responses)
Reasons: Disproportionate representation by the older and well off; others have a powerful contribution to make.
- Better-prepared delegates enrich the discussion taking place at GA and allow for more informed decision-making. (27 responses)
Reasons: Delegates need support and tools to be prepared and informed—would increase accountability and lead to more engaged congregations.
- Geographic barriers to participation are reduced by relying on regional assemblies. (27 responses)
Reasons: Interest in regional assemblies—belief they could provide powerful programming, reduce barriers to participation, and could meet regional needs—by increasing local connections and collaboration on local issues.
- Economic barriers to participation are reduced. (23 responses)
Reasons: would increase participation and diversity
- Delegates bringing information and insight back from GA engage congregations more fully in Association discussion and decision-making. (22 responses)
Reasons: Would more fully engage congregations and deepen connections to UU movement.
- Lines of authority and accountability around UUA vision are clearer. (22 responses)
Reasons: Concerns about prior tensions and effectiveness of current leadership structure; concerns of CEO/administrator also acting as public voice/spiritual leader.
- Delegates (and through them their congregations) have deeper connection to the larger UU movement. (19 responses)
Reasons: can be more effective if more connected; being connected to something larger sparks a vision.

What Steps Were Participants Most Interested in Taking to Achieve the Outcomes?

Participants were asked to choose 4 steps they were most interested in taking to improve UUA governance and General Assembly (from the list on page 4). They were most interested in:

- GA business sessions focus on learning/facilitated conversations—voting happens remotely in home congregations; make greater use of technology to enable broad participation (45 responses)
Reasons: would increase participation and congregational engagement, delegates would have more time for discussion and greater accountability
- Increase training, preparation and accountability for delegates; improve report-back from congregations (42 responses)
Reasons: could improve linkage; voting isn't meaningful without greater preparation; is part of intentional encouragement of leadership
- Increase financial support for delegates with a scholarship fund; use funds to encourage a more diverse delegate pool & more inclusive congregational selection process (38 responses)
Reasons: increases diversity. Many commented that funds should be offered on a matching basis; several acknowledged of the difficulty of implementing this step
- Multi-year cycle: hold a business/governance GA every other year (regional assemblies).

Reasons: could reduce time, money and travel barriers (32 responses)

- Align roles of President, Moderator and Board around a single vision (Place responsibility for vision squarely with the Board). (25 responses)

Reasons: More comfort with vision by group rather than 1 person; interest in dividing functions between CEO as administrator and President as prophetic voice.

Final Thoughts: One Thing that is Important for the Future:

- GA is important to several identity groups for connections—is important to continue to have ways for connection.
- GA should be alternated with regional assemblies; high quality regional assemblies could be robust feeders of ideas and participants to General Assembly.
- Remote voting could lead to participation by those whose work schedules don't otherwise allow GA participation.
- Acknowledgment of privilege and the importance of bringing together as many voices as we can.
- Need for increased participation by young adults.
- Need for financial planning for our future.
- Importance of better-prepared delegates and greater delegate participation.
- Tensions are part of governance; we should let recent changes in governance play out.
- Importance of keeping depth in the role of President.
- Increase diversity and equality.
- UUA is an umbrella organization and is more than congregations—includes communities, identity groups and other organizations.
- Most concerned with alignment of leadership.
- Annual GA is important for connections. Consider a 5-year experiment if you want to do something different.
- Really critical that GA become more affordable or our Association will be run by dinosaurs!
- Our future hinges on becoming more diverse and inclusive—we must share power with those historically marginalized.
- Concern UUA is over-emphasizing public witness.
- Grateful right relations process at GA has become more compassionate.
- UUA is at its best when it is consulting—helping congregations be healthy, helping congregants learn how not to hurt each other.
- Small struggling congregations need more help—consider creative steps like multi-site extensions.
- Belief UUA should function as a service-provider association rather than a denomination.
- Need to help congregational leaders pass on skills and knowledge to others

APPENDIX A

Unitarian Universalist Church of Silver S Wilimington ,DE	CERG/JPD	318
All Souls Unitarian Washington, DC	CERG/JPD	982
Bull Run UU's Manassas, VA	CERG/JPD	261
UU Congregation of the Catskills Kingston, NY	CERG/MNY	120
UU Church of Akron Fairlawn, OH	CERG/OM	273
UU Society of Cleveland Cleveland Heights, OH	CERG/OM	86
Murray UU Church Attleboro, MA	NE/Ballou Ch	150
First Parish Unitarian of Kingston Kingston, MA	NE/Ballou Ch	106
UU Congregation of South County Peace Dale, MA	NE/Ballou Ch	147
Unitarian Society of New Haven Hamden, NY	NE/Clara Bar	359
First Parish UU Medfield, MA	NE/Mass Bay	93
Follen Church Society Lexington, MA	NE/Mass Bay	287
Sanford UU Church Sanford, ME	NE/NNE	79
First UU Society of Exeter Exeter, NH	NE/NNE	190
First Universalist Church Minneapolis, MN	MidAmerica	1046
Unitarian Church of Evanston Evanston, IL	MidAmerica	407
UU Church of Lexington Lexington, KY	MidAmerica	258
UU Church of Indianapolis Indianapolis, IN	MidAmerica	149
UU Church of Bowling Green Bowling Green, KY	MidAmerica	120
People's Church Kalamazoo, MI	MidAmerica	226
UU Congregation of Duluth Duluth, IA	MidAmerica	225
St. Cloud UU Fellowship St. Cloud, MIN	MidAmerica	68
Neighborhood UU Church Pasadena, CA	PWR/PSWD	678
UU Church in Anaheim Anaheim, CA	PWR/PSWD	61
First UU Church San Diego San Diego, CA	PWR/PSWD	653
First Unitarian Church LA Los Angeles, CA	PWR/PSWD	56
The Boulder Valley Fellowship Boulder Valley, CO	PWR/MDD	251
UU Fellowship of Durango Durango, CO	PWR/MDD	101
Edmonds UU Church Edmonds, WA	PWR/PNW	299
Westside UU Congregation Seattle, WA	PWR/PNW	233
First Unitarian Portland Portland, OR	PWR/PNW	1012
Westside UU Church Fort Worth, TX	SR/SWD	218
First Unitarian Church of Dallas Dallas, TX	SR/SWD	1022
UU Church of Greensboro Greensboro, NC	SR/SED	179
First Unitarian Church of Orlando Orlando, FL	SR/FL	271
UU Fellowship of Gainseville Gainseville, FL	SR/FL	225
UU Church of St. Petersburg St. Petersburg, FL	SR/FL	89
UU Church of Tampa Tampa, FL	SR/FL	123
UU Church of Little Rock Little Rock, AK	SR/SWD	133
Northwest UU Congregation Sandy Springs, GA	SR/MSD	175

APPENDIX B

Congregational Dialogues on Re-Imagining UUA Governance

PARTICIPANT MATERIALS

These materials are designed to be used as part of a facilitated conversation with congregational leaders. They are not stand-alone documents. The ideas presented here represent possibilities for exploration, not proposed policies.

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Re-imagining UUA Governance – Participant Materials

CHALLENGES TO EFFECTIVE GOVERNANCE

Governance is the process by which an organization defines expectations, delegates power, verifies performance, and provides accountability. In our Association, the General Assembly is responsible for governance: GA makes policy to carry out the purposes of the UUA and directs and controls UUA affairs. Between General Assembly gatherings the UUA Board is tasked with doing these things on the behalf of the Assembly.

*But that process is not working as well as it could. Since 2010 the UUA Board has been engaged in efforts to ensure governance of our Association is more democratic, inclusive and effective. Through a lengthy process of consultation and discernment, **the Board has identified three major challenges to effective governance** in our association.*

1. Delegates. One of our challenges to effective governance as an Association is that our annual General Assembly is not, in practice, very democratic or inclusive:

- In an average year, more than 40% of member congregations do not send any delegates to GA.
- Among congregations that do send delegates, many of these delegates are self-selected and self-funded.
- Many delegates have minimal accountability to their congregations, either in preparation for voting or in reporting back.
- There are significant barriers to creating a more diverse and inclusive delegate pool (especially barriers of money, time and geography).
- The processes that we use for debate and voting favor the more aggressive and physically able among our delegates.

2. Gathering. A second challenge to effective governance of our Association is that our Annual General Assembly is not especially participatory and does not promote shared learning:

- Most delegates have little preparation for the work they will do, and little attention is paid to how delegates' work at GA feeds back to their congregations.
- There is little opportunity for intentional dialogue and learning among the delegates to aid in the discernment process for issues that affect the Association.
- Large annual meetings are very expensive for the association and member congregations. (Most other denominations meet for business once every two or three years.)

3. Leadership. A third challenge to effective governance is that there is poor alignment among leadership roles of the UUA:

- Currently, the bylaws say that the Board (led by the Moderator) acts on behalf of the General Assembly to “make overall policy for carrying out the purposes of the Association” and “direct and control its affairs.” As it carries out this responsibility, the

Re-imagining UUA Governance – Participant Materials

Board articulates a vision based on what it learns from the delegates and its other sources of authority and accountability.

- At the same time, the General Assembly elects the UUA President on a platform that usually includes his or her own vision.
- The result is that the Moderator/Board and the President/Staff sometimes have conflicting visions, making progress difficult.

The Transforming Governance Working Group is reaching out to more than 100 congregations to gain a better understanding of how we might best address these challenges. The Board is also offering an online survey to give even more people a chance to weigh in.

Even if you or your congregation are not actively engaged in our national governance, you have a great deal to offer to this conversation. One of our challenges, as a movement, is that our governance does not effectively draw on the experience and wisdom of all of our congregations. Our conversation today will help us do that. Your responses will help the Board shape its vision for making GA a more effective form of governance for our faith and mission.

About the following pages:

The following pages present *some possible ways of addressing the challenges facing us when it comes to GA and our collective governance, as well as some of the arguments for and against taking each step. These come from conversations with delegates, called and elected leaders, experts and UUs in general.*

These steps range from fairly small-scale, incremental fixes to broad changes in UUA governance. They are loosely grouped into three broad areas of focus—**but these areas are NOT mutually exclusive, nor does each one come as a set.** A plan for improvement may well mix and match elements from all three areas of focus.

SCENARIO DASHBOARD

FOCUS ON DELEGATES

Make sure delegates are well-prepared, diverse, and effective as possible. Do all we can to overcome financial, physical and other barriers to broad-based and effective participation. Make sure that all congregations—large and small—are fairly represented.

KEY STEPS:

- Increase training, preparation and accountability for delegates;** improve report-back from GA to congregations; increase delegate accountability.
- Increase financial support for delegates with a scholarship fund:** use funds to encourage more diverse delegate pool & more inclusive congregational selection processes.
- Limit number of delegates:** shift to a “Senate model” of 1 delegate per congregation. (Today, larger congregations often have deeper benches & deeper pockets and are much more likely to send delegates.)
- Ask delegates for a multi-year commitment** and to engage in ongoing linkage with UUA and with delegates from other congregations between assemblies.

FOCUS ON GATHERING

Change the GA gathering in ways that will improve two-way linkage between the UUA and member congregations. National gatherings focus on discussion & learning which is then carried back to home congregations by delegates. Votes on UUA issues take place in congregations & regional assemblies; greater use of technology to facilitate broad-based participation.

KEY STEPS:

- Multi-year cycle:** hold a business/governance GA every other year. Possible configurations:
 - Regional assemblies in off years
- OR**
- 4-year cycle
 - year 1: synod*
 - year 2: governance
 - year 3: social justice
 - year 4: governance

GA business sessions focus on learning and facilitated conversations—voting happens remotely in home congregations.

Make greater use of technology to enable broad participation.

Compress business into 1-2 days to reduce travel time commitment. Additional optional days might be offered for learning and other purposes.

** A synod is a meeting of laypeople and clergy for the purpose of theological discussion and enrichment. Synods work to establish understanding about what is commonly believed across the tradition and how this might be applied to contemporary issues.*

FOCUS ON LEADERSHIP

Change leadership roles in UUA governance to encourage stronger alignment around a single vision. Address conflicting/misaligned leadership roles.

KEY STEPS:

Modify the roles of President, Moderator, and Board so that all are aligned around a single shared vision and lines of authority & accountability around that vision are clearly defined. For example:

- *Place responsibility for Vision squarely with the Board:* President elected by GA serves as the public voice of UUism, is a voting member of the Board and serves ceremonial/ spiritual functions (not CEO). Board hires Executive Director to act as UUA CEO and handle fund-raising.

OR

- *Place responsibility for Vision squarely with the President:* President elected by GA acts as CEO, chief fundraiser, and public voice. President leads all visioning activities on the Board. GA-elected Moderator serves as Board chair, runs GA and is responsible for its process. As is the case today, the Board can remove the President if this is in the best interests of the UUA.

Re-imagining UUA Governance – Participant Materials

PROS/CONS

FOCUS ON DELEGATES

Increase training, preparation, and accountability for delegates; improve report-back from GA to congregations; increase delegate accountability.

Pros:

- ▲ *Better-prepared delegates enrich the discussions taking place at GA and allow for more informed decision-making*
- ▲ *Delegates have greater ownership over decisions*

Cons:

- ▼ *Increasing expectations for delegates may make some reluctant to serve*
- ▼ *Increases burden on UUA staff, who must coordinate the training and preparation*

Increase financial support for delegates with a scholarship fund: use funds to encourage more diverse delegate pool & more inclusive congregational selection processes.

Pros:

- ▲ *Economic barriers to participation are reduced*
- ▲ *Increased participation by young adults, lower income people, people of color & others whose inclusion supports our progressive future*

Cons:

- ▼ *Providing meaningful support will be very costly, especially in initial years – may require tapping reserves or cuts in other funding support*
- ▼ *May require matching support from regions or grant-making entities*

Limit number of delegates: shift to a “Senate model” of 1 delegate per congregation. (*Today, larger congregations often have deeper benches & deeper pockets and are much more likely to send delegates.*)

Pros:

- ▲ *GA’s debate & deliberation process is more meaningful, less repetitive*
- ▲ *Delegates can receive meaningful financial support*

Cons:

- ▼ *Unfair to large congregations, which represent more individuals*
- ▼ *May limit diversity, if congregational leadership skews white or wealthy or older*

Ask delegates for a multi-year commitment and to engage in ongoing linkage with UUA and with delegates from other congregations between assemblies

Pros:

- ▲ *Increased continuity when GA is addressing major issues and decisions*
- ▲ *Delegates (and through them their congregations) have deeper connections to the larger UU movement*

Cons:

- ▼ *Asking delegates for a 2+ year commitment may make it more difficult for some to participate*
- ▼ *Assumes people will be interested in being involved in UU governance at national level*

Re-imagining UUA Governance – Participant Materials

PROS/CONS

FOCUS ON GATHERING

Multi-year cycle: hold a business/governance GA every other year. Possible configurations:

- *Regional assemblies in off years*

OR

- *4-year cycle*
 - year 1: synod
 - year 2: governance
 - year 3: social justice
 - year 4: governance

Pros:

- ▲ *Geographical barriers to participation are reduced by relying on regional assemblies*
- ▲ *Delegates & others have more time to learn and prepare*
- ▲ *Governance is more efficient because there are fewer business meetings*

Cons:

- ▼ *Slows down the clock on important issues*
- ▼ *Gatherings in off years provide fewer opportunities for worship, being in touch, gathering with affinity groups, and all the other important non-governance activities of the current annual national meeting*

GA business sessions focus on learning and facilitated conversations—voting happens remotely in home congregations. Make greater use of technology to enable broad participation.

Pros:

- ▲ *Delegates bringing information and insight back from GA engage congregations more fully in Association discussion and decision-making*
- ▲ *Delegate accountability is increased*
- ▲ *Congregational authority is increased*

Cons:

- ▼ *Asking delegates to brief their congregations is a big responsibility*
- ▼ *Technology (like web-links, teleconferencing) may be out of reach for some*

Compress business into 1-2 days to reduce travel time commitment. Additional optional days might be offered for learning and other purposes.

Pros:

- ▲ *GA focuses only on what is truly important*
- ▲ *Cost of GA is reduced*
- ▲ *Delegates need to take less time off work*

Cons:

- ▼ *Time may be too short to allow full discussion and discernment on difficult issues*
- ▼ *Limited time for working through challenges may make it more difficult to get things done*
- ▼ *Emerging issues may be excluded from the agenda*

Re-imagining UUA Governance – Participant Materials

PROS/CONS

FOCUS ON LEADERSHIP

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- *Place responsibility for Vision squarely with the Board:* President elected by GA serves as the public voice of UUism, is a voting member of the Board and serves ceremonial/spiritual functions (not CEO). Board hires Executive Director to act as UUA CEO and handle fund-raising.

OR

- *Place responsibility for Vision squarely with the President:* President elected by GA acts as CEO, chief fundraiser, and public voice. President leads all visioning activities on the Board. GA-elected Moderator serves as Board chair, runs GA and is responsible for its process. *As is the case today, the Board can remove the President if this is in the best interests of the UUA.*

Pros:

- ▲ *Lines of accountability and authority around UUA vision are clearer*
- ▲ *Energy that now goes to dealing with friction in the system is freed up and directed toward the pressing issues of our faith*

Cons:

- ▼ *The friction created by checks and balances is GOOD – it stimulates good ideas and helps avoid myopic mistakes*
- ▼ *This could be seen as a power grab on the part of the Board or the President—it may increase friction, not resolve it*

Re-imagining UUA Governance – Participant Materials

PROS CHECKLIST

Focus on Delegates

- Better-prepared delegates enrich the discussions taking place at GA and allow for more informed decision-making*
- Delegates have greater ownership over decisions*
- Economic barriers to participation are reduced*
- Increased participation by young adults, lower income people, people of color & others whose inclusion supports our progressive future*
- GA's debate & deliberation process is more meaningful, less repetitive*
- Delegates can receive meaningful financial support*
- Increased continuity when GA is addressing major issues and decisions*
- Delegates (and through them their congregations) have deeper connections to the larger UU movement*

Focus on Gathering

- Geographical barriers to participation are reduced by relying on regional assemblies*
- Delegates & others have more time to learn and prepare*
- Governance is more efficient because there are fewer business meetings*
- Delegates bringing information and insight back from GA engage congregations more fully in Association discussion and decision-making*
- Delegate accountability is increased*
- Congregational authority is increased*
- GA focuses only on what is truly important*
- Cost of GA is reduced*
- Delegates need to take less time off work*

Focus on Leadership

- Lines of accountability and authority around UUA vision are clearer*
- Energy that now goes to dealing with friction in the system is freed up and directed toward the pressing issues of our faith*

Other?

- _____
- _____
- _____