



Report of The
UNITARIAN UNIVERSALIST
COMMISSION ON APPRAISAL
On The Mandated Review of
ARTICLE II OF THE UUA BYLAWS

December 19, 2008

Members of the Commission on Appraisal

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1. Memorandum

To: The Unitarian Universalist Association Board of Trustees,
The President of the Association, and the Moderator

From: The Unitarian Universalist Association Commission on Appraisal

Re: Report on Review of Article II and Proposed Revision

Date: December 19, 2008

It is with no little excitement that we present this report for your consideration. The review of Article II has been a challenge and a learning experience and has indeed reconnected us with this faith in ways we could not anticipate.

You will see that we describe the process we used and give you an account of responses we have received at various stages but in particular after we released a preliminary draft revision in August 2008. Many people have participated along the way by sharing their concerns, insights, and suggestions. We have produced a proposal that reflects what we have read and heard. We include in this report additional reflection on the rationale for what we are proposing.

We hope you will place the proposed revision on the Final Agenda for General Assembly 2009 for its first (simple majority) vote. We believe delegates will be well served to have a session as a committee-of-the-whole before the vote is taken. The delegates can, of course, decline a vote and send the report back to the Board. We do not believe, however, they would choose to do that.

We trust you will examine Sections 3 and 4 of this report. Section 3 describes our process and reviews the results of our survey based on the August 2008 preliminary draft. We had respondents aged from 16 to 97 and from many identity groups. They were 80.5% lay and 18.5% professional, and their comments run to over 450 pages in condensed form. Some 1700 individuals communicated with us by filling out the survey or sending comments via e-mail or post. Section 4 gives the rationale for the proposal.

On a personal note, it has been a privilege to be asked to Chair the Commission during this time. I have only gratitude for all the Unitarian Universalists who indeed care about this faith so much. And I have never in 30 years of ministry worked with a more wonderful team, each member of which has brought a different perspective, skill and temperament to this challenge. I commend them and also the members of the Nominating Committee whose loving care and wisdom brought us together.

Orlanda Brugnola
for the Commission

2. Proposed Revision of Article II

ARTICLE II: Covenant

Section C-2.1 Purposes.

This association of free yet interdependent congregations devotes its resources to and exercises its corporate powers for religious, educational, and humanitarian purposes. It supports the creation, vitality, and growth of congregations that aspire to live out the Unitarian Universalist Principles. Through public witness and advocacy, it advances the Principles in the world.

Section C 2.2. Sources.

Unitarian Universalism is rooted in two religious heritages. Both are grounded on thousands of years of Jewish and Christian teachings, traditions, and experiences. The Unitarian heritage has affirmed that we need not think alike to love alike and that God is one. The Universalist heritage has preached not hell but hope and courage, and the kindness and love of God. Contemporary Unitarian Universalists have reaped the benefits of a legacy of prophetic words and deeds.

Unitarian Universalism is not contained in any single book or creed. Its religious authority lies in the individual, nurtured and tested in the congregation and the wider world. As an evolving religion, it draws from the teachings, practices, and wisdom of the world's religions. Humanism, earth-centered spiritual traditions, and Eastern religions have served as vital sources. Unitarian Universalism has been influenced by mysticism, theism, skepticism, naturalism, and process thought as well as feminist and liberation theologies. It is informed by direct experiences of mystery and wonder, beauty and joy. It is enriched by the creative power of the arts, the guidance of reason, and the lessons of the sciences.

Grateful for the traditions that have strengthened our own, we strive to avoid misuse of cultural and religious practices while seeking ways of appreciation that are respectful and welcomed.

Section C-2.3 Principles.

Grateful for the gift of life, we commit ourselves as member congregations of the Unitarian Universalist Association to embody together the transforming power of love as we covenant to honor and uphold:

- The inherent worth and dignity of every person;
- Justice, equity, and compassion in human relations;
- Acceptance of one another and encouragement of spiritual growth;
- A free and responsible search for truth and meaning;
- The right of conscience and the use of democratic processes;

- The goal of world community with peace, liberty, and justice for all;
- Reverence for the interdependent web of all existence of which we are a part.

As free yet interdependent congregations, we enter into this covenant, pledging to one another our mutual trust and support. Capable of both good and evil, at times we are in need of forgiveness and reconciliation. When we fall short of living up to this covenant, we will begin again in love, repair the relationship, and recommit to the promises we have made.

Section C-2.4 Inclusion.

Systems of power, privilege, and oppression have traditionally created barriers for persons and groups with particular identities, ages, abilities, and histories. We pledge to do all we can to replace such barriers with ever-widening circles of solidarity and mutual respect. We strive to be an association of congregations that truly welcome all persons and commit to structuring congregational and associational life in ways that empower and enhance everyone's participation.

Section C-2.5 Freedom of Belief.

Congregational freedom is central to the Unitarian Universalist heritage.

Congregations may establish statements of purpose, covenants, and bonds of union so long as they do not require a statement of belief as a creedal test for membership; nor may the Association employ such a test for congregational affiliation.

3. Process and Timeline

The UUA Bylaws mandate a review of Article II, containing the UUA Principles and Purposes, every fifteen years. Section C-15.1(c)(4) reads:

If no review and study process of Article II has occurred for a period of fifteen years, the Board of Trustees shall appoint a commission to review and study Article II and to recommend appropriate revisions, if any, thereto to the Board of Trustees. The Board of Trustees shall review the recommendations of the study commission and, in its discretion, may submit the recommendations of the study commission to the Planning Committee for inclusion on the agenda of the next regular General Assembly. Notwithstanding anything to the contrary contained herein, proposals to amend Article II which are promulgated by a study commission in accordance with this paragraph shall be subject to a two-step approval process. Such proposals must be approved preliminarily by a majority vote at a regular General Assembly. Following such preliminary approval, the proposal shall be placed on the agenda of the next regular General assembly for final adoption. Final adoption shall require a two-thirds vote.

In January 2006 at its regular meeting, the Commission realized that a review of Article II was overdue. At roughly the same time the Board of Trustees came to the same realization. As the Commission had just completed its report, *Engaging Our Theological Diversity*, it seemed logical to both the Board and the Commission that the Commission itself might be the best body to review Article II. This idea, however, raised a delicate issue. The Commission is made up of nine members elected by the General Assembly for six-year terms. It is an independent study group responsible to the *delegates*, not to the Board, the President or the Moderator. The Board would be the body to place any proposal regarding Article II on the Final Agenda for the General Assembly. Nevertheless, the Commission believed it was the most appropriate group to undertake the review. The Board agreed.

Following its January 2006 meeting, the Commission undertook a serious course of study about the origins of the current Article II. That study involved reviewing historical materials that had been accessed in the preparation of *Engaging Our Theological Diversity* as well as other relevant publications, including sermons and articles as well as books. We sought comments and reflections from the individuals who were involved in the drafting of the current Article II, and we received extensive comments from several of them.

The Commission undertook a series of hearings in St. Louis (General Assembly); Columbus, OH; San Diego CA; Washington, DC; Portland, OR (General Assembly); Minneapolis, MN; and Ft. Lauderdale, FL (General Assembly). At the St. Louis General Assembly, the Commission had a booth in the exhibit hall and invited people to voice additional comments about the Purposes and Principles on video, write them on cards, or type them on a computer provided for that purpose.

The Commission developed and made available online and in print four curricula for adults, youth, and children to enable intentional discussions of Article II and individual or group comments to us on a form included in the curricula. These materials were sent out in congregational packets, and provided twice to congregational presidents. The materials gave congregations options ranging from a one-session workshop to a five-session course. We designed these curricula with the express intent to have participants in the review comment based on thoughtful reflection and discussion rather than give us “off-the-cuff” opinions. The response time for comments was initially one year but was extended to fifteen months.

During this time the Commission received comments from about 1000 people. These comments were received at hearings, from workshop responses, in interviews, and by e-mail and post. The Chair also interviewed a non-Unitarian Universalist theologian who had a significant role in the process that led to the publication of *Soulwork*. With permission granted by the participants, the Commission was given access to substantial portions of interchanges about Article II and the review by ministers on the UUMA list-serv.

The Commission reached out to lay and professional leadership, to identity groups and to youth and young adult constituencies. Commissioners made presentations at the annual meeting of DRUUMM and had a special gathering for youth and young adults at the Portland General Assembly. Two clergy Commissioners held a “Collegial Conversation” on Article II during Professional Days preceding General Assembly 2007. Commissioners offered workshops at congregations and at District Annual Meetings. The Commission also sought and received commentary from members of the UUA staff.

Meanwhile, the Commissioners ourselves engaged in extensive reflection on such questions as these: What is the importance of this review for the well-being of Unitarian Universalism? What impact will or should its outcome have on Unitarian Universalist missions and ministries? What values should guide decision-making about whether and how to revise the text of Article II? Commissioners wrote and shared reflection papers with each other. We studied new text proposed by others. We revised and revised and revised some more based on our answers to some 25 “macro” questions on conceptual and strategic matters. These addressed such issues as how much weight should be given to a variety of factors, the arguments for making no changes at all, and the arguments for making broad changes. We also addressed, one by one, some 175 “micro” questions about single words, phrases, and, yes, even punctuation.

In August 2008 the Commission met for four days of intense drafting work to prepare a preliminary revision of Article II on which to seek comment. It addressed the most commonly asserted opinions and concerns we had received. This preliminary revision was released through congregational packets, mass e-mail blasts to UUA list-servs and outreach to identity groups. It was also featured on the UUA homepage and available on the Commission’s webpage. Facebook access was also provided. Accompanying this revision was a survey accessible online and downloadable as well.

The survey allowed respondents to rate each part of the draft revision and also to comment on each section.

The Commission received some 1700 responses online and by post as well as a great many comments via e-mail. 70.4% of the responses rated the draft revision as “Excellent” or “Good.” The comments received run to over 450 pages in condensed form. Age range for respondents was from 16 to 97 years with the modal (most common) age being 61 years. Length of time as a Unitarian (Universalist) ranged from 3 months to 91 years, with the mode 15 years. Of the 1,605 responders who included race/ethnicity, 67 identified themselves as Black, Hispanic, Asian or Native American. Among the respondents, 1,113 identified themselves as White. Of the 1400 respondents who indicated whether they were religious professionals, 80.5% indicated they were not religious professionals and 19.5% indicated they were.

Following the survey, the Commission met to process all the data and to review the comments received. Based on those comments we have revised the text. The proposal offered above in Section 2 is the final version of our work on Article II.

4. Rationale

Introduction. If any of us on the Commission had doubted the power of words, which of course we did not, this review would have convinced us of that power. At every step of the way when the Commission sought comments and responses to particular choices of words, we received impassioned arguments for and against whatever we presented. We were not surprised, and we grew accustomed to standing back and taking a long view.

To begin with, the Commission anticipated there would be some resistance to any changes at all in Article II, particularly in the Principles and Sources sections. Consequently, when respondents resisted draft changes, we investigated that resistance and weighed it carefully against the many suggestions for change that we received.

We took into consideration the differences between the mid-1980's context and the current one. In the mid-1980's, the revision of Article II grew from grass-roots efforts by those who wanted to remove sexist language and those who wanted the bylaws to reflect more clearly changing theological ideas. In contrast, when the Commission took up this review, there was no grass-roots effort bringing forward any proposal for change. There was only the Bylaw section mandating review every fifteen years. We did not want simply to survey people's opinion. We wanted to engage them in thoughtful reflection and discussion about Unitarian Universalism today and the role in congregational life of not only the Principles and Purposes but the whole of Article II.

We are happy to say that our outreach efforts bore fruit. We know that from the high volume of comments we received at every stage, the intricate arguments people posed, and their enthusiastic and passionate expressions of thought and opinion. It readily became clear that the natural resistance of human beings to change, any change, would not prevail against the waves of suggestions for revision of Article II.

Those who instituted the bylaw mandating review every fifteen years clearly knew what they were doing. By 2006, when this review began, the world had changed, and Unitarian Universalism had changed. The Commission's task has been to reflect these changes in ways that will sustain this Association of Congregations for at least the next fifteen years.

The responses we received were not easily quantifiable, and there were varying degrees of cross-reference among them. They said what sometimes seemed to be the same thing, but not with certainty, in different ways. They approved or disapproved of some idea or wording for different reasons. As soon as we began collecting responses, we learned that it was not going to work for us simply to operate as "bean counters," redrafting to reflect whatever the majority wanted on any given matter. In response, the Commission's work required more than the ability to calculate; it required discernment and a delicately calibrated weighing scale. It was good that there are nine of us – nine very different Unitarian Universalists – because we had many, many occasions to reflect

together, to attempt to persuade each other, and sometimes to let go of preferences in view of more widely held perceptions. New rounds of comments would often cause us to rethink something that had seemed settled.

Here are the matters that drew the most attention from respondents, and thus from the Commission. The results appear in the proposed revision of Article II.

Covenant. Even though the current wording of Article II says that congregations “covenant to affirm and promote” the Principles, the Commission encountered substantial commentary in favor of reinforcing the idea that we are covenantal rather than creedal. Some expressed dismay that the children’s version of the Principles begins with language that says: “We believe.” On the other hand, some said they wished the Principles were expressed in language easier to memorize. Clearly, many Unitarian Universalists do regard the Principles as a belief statement – their personal belief statement. When we arrived at “Covenant” as our proposed title for the whole of Article II, it came of addressing the fact that the current title “Principles and Purposes” does not cover the whole of Article II. Also, the whole of what is covered in the Article, including the final two sections on Inclusion and Freedom of Belief, are germane to the relationships among congregations. We found ourselves walking a tightrope with bylaw language applicable to the Association at one pole and at the other aspirational language applicable to individual Unitarian Universalists. The resulting ambiguity in language throughout our proposal is thus intentional. Article II must speak to and about both the Association and individual Unitarian Universalists.

Sequence and Titles of Sections. The Commission gave considerable attention to the sequence of material in the current Article II and reordered it (1) to establish the Purposes as the legal bona fides of the Association at the outset, (2) to set out the Sources before the Principles so that the former can properly serve as a foundation for the latter, (3) to put the Sources and Principles in separate sections for easy finding and reference, and finally (4) to address Inclusion and Freedom of Belief. It has been clear from the earliest rounds of commentary that the final two sections have been bafflingly convoluted and needed overhauling, not to change their substance but to clarify it.

Respondents expressed a great wish to turn “Non-Discrimination” into a positive provision, and we did that in what is now the section on “Inclusion.” We also took up the question of whether to list specific categories of people that the Association and individual Unitarian Universalists seek to protect from discrimination. We found it worthwhile to avoid the dangers resulting from excluding some specific unmentioned group in a list of specifics. On the other hand, we heard the clear voices of those who insisted that the general proclamation that “all are welcome” is not enough and carries its own dangers. We found a middle way.

The “Freedom of Belief” section needed to be restructured for clarity. We did that. Some people hoped we would revise that section so as to make clear that “Unitarian Universalists are not free to believe whatever they want”; however, we decided that was beyond the scope of what this bylaw could accomplish.

Sources. By far the most scrutiny by respondents went to the Sources. Clearly the Sources deserved a section of their own. Perhaps the most strongly expressed wish was that Article II would give Unitarianism and Universalism their due as sources of present-day Unitarian Universalism. This prompted considerable conversation as to whether the bylaw is intended to address the sources of Unitarian Universalism or the sources of contemporary individual Unitarian Universalists' spiritual and religious life. Respondents saw this both ways often enough to persuade us to accommodate both views.

Respondents gave considerable attention to the format of Sources in the current Article II as a list. Many were dissatisfied with the "which" clauses describing individual Sources. For instance, words and deeds of prophetic women and men do more than challenge us. Jewish and Christian teachings are not the only ones that teach us to love our neighbor. The valuable teachings of the sciences come to us not only through the conduit of humanism. In short, the pattern of making some observation about each Source has been problematical for many people. In response, we eliminated that pattern.

Issues arose regarding the listing of specifics in this section as well. Some people would prefer an unvarnished reference to "all of the world's religions" without reference to Jewish and Christian teachings or any other. Some people would prefer additional religions be named, in particular Buddhism and/or Islam. Others wanted other sources listed, most notably sources related to the arts or to other bodies of thought or theology, not specifically nameable as religions. Many people drew inferences from the sequence of the listing of Sources and wanted it changed though not in the same way. The Commission found that many of the sequence-related concerns would be diminished by naming the Sources in a paragraph rather than in a list. Although we declined to add specific religions by name, we were persuaded to add "Eastern religions" as well as other bodies of thought and theologies that have come into their own in Unitarian Universalist religious and spiritual life in recent years. Some Unitarian Universalist humanists argued that our preliminary revision appeared to discount the role of humanism in Unitarian Universalism. Although that was never our intention, we took particular care in the final proposal to avoid any such impression.

The additional issue that arose in regard to the Sources related to what is often called misappropriation. Some respondents argued that it is not enough to say we are grateful for pluralism but that one of the major marks of current Unitarian Universalism is its attention to anti-racism, anti-oppression, and multiculturalism. There has been strong effort among respondents to have Article II reflect this. Others have written about the difficulties of defining exactly what misappropriation is and about the importance of avoiding the use of a bylaw as a tool that could stifle the impulse to teach and appreciate religions and traditions other than our own. In the final paragraph of the "Sources" section, the Commission honors both noble intents.

Principles. The Commission has been fascinated to see the recent proliferation of a variety of publications and other materials stating the Principles, and most recently, an

invitation from Skinner House to congregations' Religious Education departments to propose still more publications further institutionalizing the Principles as currently stated. At the same time, the Commission received many, many suggestions for changing the Principles. The most common suggestions were to reorder them, making the last first, or to reduce the number significantly. This latter suggestion appeared to relate to a wish to aid memorization. A fair number of people have come to be critical of implicit individualism in the first Principle and its relation to the idea that all the evil in the world is "out there" rather than possibly "in here" too. Others have stressed to the Commission that the ease with which people refer to "our first Principle" indicates that they really do believe it is the most important. Some like that. Others abhor it.

The Commission ultimately decided not to propose either changing the sequence of the Principles or reducing their number. The widespread resistance to such changes and the many forms of that resistance were persuasive. When we sent out the August draft for commentary, we included after each Principle a short paragraph elucidating the aspirations associated with it. Most commentators did not like these paragraphs. The paragraphs did serve a useful purpose, however. They taught us what people understood the Principles to mean and how specific changes would be received.

In response to persuasive arguments, we did make a few changes in wording, changes that will not interfere in any real way with continued use of publications and other materials that carry the current wording. The proposed version of the third Principle recognizes spiritual growth outside of the context of the congregation. The proposed version of the fifth Principle recognizes that more than one process can be understood as democratic. The proposed version of the seventh Principle now elevates the response to the interdependent web from respect to reverence.

One proposed change of wording within the Principles themselves that received substantial commentary was the proposal to change the first Principle to refer to "all beings" rather than "every person." Given that it truly would be a significant substantive change and given that we received far more staunch support for retaining the present wording of the first Principle than for probably any other particular matter, we did not adopt the proposed change.

The prefatory language that introduces the Principles was a natural place to reinforce the foundation of our covenantal religion. We chose the introductory verbs "honor and uphold" as being more reverential and less promotional than "affirm and promote." As one commenter put it, the proposed new language expresses our own obligations rather than seeking to obligate others. Likewise, we chose concluding language that reinforces the implications of being in covenantal relationship.

Conclusion. The Commission has conducted a thorough review of Article II. We have accomplished our wish to engage a large number of individuals, congregations, and communities of Unitarian Universalists in important shared reflection and study about what it means to be Unitarian Universalists in the early twenty-first century. Our proposal is the culmination of all that reflection and study on the part of many, many

people, including ourselves. We look forward to the conversation going forward through having the proposal on the Agenda at the 2009 General Assembly. Assuming the Board sends it to the Planning Committee for inclusion on the Agenda, we will of course provide congregations substantially more detail about our process, the results of the surveys, and the rationale for our decisions. In other words, this review and its results, can indeed have significant impact on the future of American Unitarian Universalism for the next fifteen years. We are honored to take this part in the life of our Association, and we are grateful for this opportunity to share our work with the Board of Trustees. May we thrive together.

5. Present Text of Article II

ARTICLE II Principles and Purposes

Section C-2.1. Principles.

We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote

- The inherent worth and dignity of every person;
- Justice, equity and compassion in human relations;
- Acceptance of one another and encouragement to spiritual growth in our congregations;
- A free and responsible search for truth and meaning;
- The right of conscience and the use of the democratic process within our congregations and in society at large;
- The goal of world community with peace, liberty and justice for all;
- Respect for the interdependent web of all existence of which we are a part.

The living tradition which we share draws from many sources:

- Direct experience of that transcending mystery and wonder, affirmed in all cultures, which moves us to a renewal of the spirit and an openness to the forces which create and uphold life;
- Words and deeds of prophetic women and men which challenge us to confront powers and structures of evil with justice, compassion and the transforming power of love;
- Wisdom from the world's religions which inspires us in our ethical and spiritual life;
- Jewish and Christian teachings which call us to respond to God's love by loving our neighbors as ourselves;
- Humanist teachings which counsel us to heed the guidance of reason and the results of science, and warn us against idolatries of the mind and spirit;
- Spiritual teachings of Earth-centered traditions which celebrate the sacred circle of life and instruct us to live in harmony with the rhythms of nature.

Grateful for the religious pluralism which enriches and ennobles our faith, we are inspired to deepen our understanding and expand our vision. As free congregations we enter into this covenant, promising to one another our mutual trust and support.

Section C-2.2. Purposes.

The Unitarian Universalist Association shall devote its resources to and exercise its corporate powers for religious, educational and humanitarian purposes. The primary purpose of the Association is to serve the needs of its member congregations, organize new congregations, extend and strengthen Unitarian Universalist institutions and implement its principles.

Section C-2.3. Non-discrimination.

The Association declares and affirms its special responsibility, and that of its member congregations and organizations, to promote the full participation of persons in all of its and their activities and in the full range of human endeavor without regard to race, ethnicity, gender, disability, affectional or sexual orientation, age, language, citizenship status, economic status, or national origin and without requiring adherence to any particular interpretation of religion or to any particular religious belief or creed.

Section C-2.4. Freedom of Belief.

Nothing herein shall be deemed to infringe upon the individual freedom of belief which is inherent in the Universalist and Unitarian heritages or to conflict with any statement of purpose, covenant, or bond of union used by any congregation unless such is used as a creedal test.