



COMMISSION ON APPRAISAL

To provoke deep reflection and evoke timely, creative transformation of Unitarian Universalism, our congregations, and the Unitarian Universalist Association.

ANNUAL REPORT TO THE UUA GENERAL ASSEMBLY June 2013

Greetings! We are pleased to share with you an annual report of the activities and accomplishments of the UUA Commission on Appraisal during Fiscal Year 2013. In this report, we celebrate the completion of our study, “Who’s In Charge Here?: The Complex Relationship between Ministry and Authority, honor transitions in our elected offices, and review our activities during the past year. We thank you for electing us as your leaders, supporting our work, and offering us the opportunity to serve in this important capacity.

In faith,

Megan Dowdell (Chair), on behalf of The UUA Commission on Appraisal

“Who’s In Charge Here?: The Complex Relationship between Ministry and Authority”

We are thrilled to announce we have just completed the Commission on Appraisal’s thirteenth study, “Who’s In Charge Here?: The Complex Relationship Between Ministry and Authority.” We launched this study at GA 2010 with the intent to produce a report that would serve as a resource for lay leaders and ministers to better understand and navigate the complex relationship between ministry and authority. We are thrilled to release the final version of this report right where we started, at General Assembly.

In this past year, we drafted the report, created a study guide, compiled appendices, and participated in a rigorous group-editing process, run by our project manager, Erica Baron. We have been fortunate to work closely with editor Marshall Hawkins of the Publications Office of the UUA in the process of editing the final manuscript and making the report available to Unitarian Universalists everywhere both in print and by e-publication. In this section of our annual report, we would like to share a brief summary of the key findings in our study, “Who’s In Charge Here?: The Complex Relationship Between Ministry and Authority.”

Listening, defining, engaging difference

In earlier stages of this report, we listened to the stories and experiences of Unitarian Universalists through in-depth interviews and focus groups. Here, we found that there is a great deal of tension around issues of authority in congregations. Some of this is the result of abuses of power or clearly inappropriate behavior. But more often, there is no clear right and wrong; instead there are important values in tension. These tensions can cause very real pain, but they are also the crucible which gives rise to new and dynamic forms of ministry.

Unitarian Universalists seek to create vibrant life-giving congregations which contribute to the personal and spiritual growth of their members and serve the spirit of liberation in the world. In order to do this, as Unitarian Universalists we need to become more skilled at navigating the tensions around ministry and authority in our congregations.

In this report, we sought to define the problems our participants identified as central to the relationship between ministry and authority. To do so, we opened ourselves to being led by the voices of those holding marginalized identities. We hoped to bring their experiences to the center of our report, rather than simply extending a dominant or traditional view of authority to include oppressed groups. This process challenged us to engage difference with curiosity and brought us to a deeper understanding of the systems and institutions at work in conflicts around authority and ministry, as well as potential responses to these problems. We looked at the historical and social contexts that contribute to our congregations' struggles with ministry and authority. We then considered what we mean by "ministry," followed by what we mean by "authority." We asked ourselves and our participants, "who does and does not have authority in UU congregations?" and looked in detail at the conflicts which arise in congregations around ministry and authority. Finally, we considered ways to respond to these conflicts, which will move us toward our aspirations and UU principles.

Understanding types of conflict, finding a "way out"

As we looked closely at the stories of conflicts around ministry and authority in congregations, we discovered three important types of conflicts:

- **Situations**, such as transitions in ministers, size, theology, or times of financial difficulty, are likely to produce stress and conflict around ministry and authority.
- **Roles and relationships**, such as ones between people given formal authority, like the Board, and those given significant informal authority, like long-time members of congregations, frequently produce complicated questions about who is really in charge and who can make what types of decisions.
- **Behaviors**, such as working from hidden agendas, maintaining poor boundaries, turning individual personality conflict into all-church struggles, or not staying at the table, can escalate conflicts around ministry and authority.

Those with marginalized identities—both ministers and lay people—are also more vulnerable to the effects of conflict in congregations. They are less likely to have their

voices and perspectives heard and honored, and more likely to be scapegoated. In some situations, such as a dramatic change in the demographics of a congregation, others can see those with marginalized identities as the problem itself in the congregation, but even when this is not true, conflict can have the greatest negative impact on those who are already in precarious positions in our congregations.

Conflicts over ministry and authority, and our congregations in general, do not operate in a vacuum. Conflicts over ministry and authority are permeated by a cultural context that exposes our communities to particular ways of speaking, listening, and sharing power that lift up or validate particular styles and abilities, and oppress or neglect others. In the context of Unitarian Universalism, our report asks: how can we use our deep faith values to create just, sustainable ministries that encourage trust, authenticity, and liberation? What do we need from our professional ministers and what do they need from each other, our congregations, and the Unitarian Universalist Association to help call such a vision into being?

Responding to conflict as Unitarian Universalists

Shared in the full report, our responses to conflicts over authority and ministry share some common implications:

- How we define authority influences how we respond to conflicts over authority and ministry. As a Commission, we have come to understand authority as the *ability to influence and bring about growth and change in an institution, or to block and derail growth and change in an institution.*
- We serve on the UUA Commission on Appraisal because we believe in the Unitarian Universalist vision of a beloved community and we believe in congregations which can serve this vision. When asking “Who’s In Charge Here?” we have been aware that there are congregational conflicts that undermine this vision. In some ways, this report seeks to interrupt such conflicts and find a “way out” that directs the spiritual resources we *already have* toward conflicts of ministry and authority.
- We have identified ways to shift our attitudes, culture, and institutions that might help us think about, talk about, and engage lovingly and skillfully in conflict. These include establishing trust, cultivating inner resources, authorizing each other, balancing clarity with flexibility, responding to theological differences and cultural definitions of leadership, gathering institutional support, and taking advantage of the resources we already possess.

For the full set of recommendations and resources, as well as the details of our research and findings, we invite you to read “Who’s In Charge Here: The Complex Relationship between Ministry and Authority.” You can get a copy at the UUA Bookstore at General Assembly and on-line at www.uuabookstore.org

Transitions on the COA

This year is one of great transitions in the membership of the Commission on Appraisal. Two weeks prior to our October 2012 meeting, commissioner Don Mohr passed away. Don served on the COA from 2007 right up to the final days of his life. We have dedicated our final report to Don. Also, in the fall of 2012, Mitra Rahnema resigned from the Commission. We are grateful for both Don and Mitra's contributions to this report, which are very much alive in the final manuscript.

In June 2013, two commissioners, Pete Fontneau and Bev Harrison, complete their six-year terms on the Commission. Four commissioners have been nominated by the UUA Nominating Committee and running unopposed for election by the 2013 General Assembly. The arrival of Lucy Bunch, John Hawkins, Nathan Hollister, and Rev. Myriam Renaud would restore us to a full Commission of nine elected leaders.

This spring we conducted our biennial election to leadership positions on the Commission. For the next two years, positions will be held as follows:

Chair	Rev. Nana' Kratochvil
Vice Chair	Rev. John Cullinan
Secretary	Rev. Erica Baron
Treasurer	Ms. Megan Dowdell
Chaplain	Rev. Lynne Garner

How We Worked Together This Year

In the past few years, the UUA Commission on Appraisal has experienced substantial budget cuts, which have limited our ability to meet face-to-face on a quarterly basis and participate in the General Assembly as previous Commissions have been able to do. As an elected body of nine members from around the country, responsible to the General Assembly, hefty cuts threaten our ability to fulfill our mission of independently reviewing issues of importance to Unitarian Universalism. In this section of our annual report, we wish to offer insight into the rigorous schedule of our work under such conditions as a means of celebrating our accomplishments despite setbacks and imparting to you the ways in which the sustainability of the Commission is endangered.

Budget reductions, doing more with less

As we do each year, in FY2013, we strove to be good financial stewards and accomplish what it is we were elected to do, including reporting to you, our General Assembly. Last year, we were informed by the UUA Board of Trustees that our work ought not to include attendance at Justice GA 2012 in Phoenix. We were provided a budget of \$25,000 to complete all of our work for FY2012. Without the financial support necessary to send commissioners to Justice GA, we did not have any meetings, report, workshop, or official presence as part of this historic and important gathering.

Particularly, as our work together has intensified in terms of how the Commission acts

upon our UU commitments to anti-racism, anti-oppression, and multiculturalism in this reporting cycle, we lamented the inability to participate in General Assembly 2012 as a full Commission.

The UUA By-laws require we report to General Assembly as an independent, elected body no less than every four years. As in the previous fiscal year, the FY2013 budget of the Commission on Appraisal was not restored to include the expenses of meeting at General Assembly (roughly \$14,340 for seven commissioners, \$15,840 for a full Commission of nine), despite the by-law requirement. Interestingly, we were also offered a program slot by the UUA Board's Program Development Group to share the findings of "Who's in Charge Here?: The Complex Relationship of Ministry and Authority." In order to fulfill our requirements to the body that elected us, welcome our newly elected commissioners, and provide an excellent program on our report, we will still attend General Assembly 2013 as a full Commission.

Continuing our inventive use of limited resources of the previous year, we made significant advances in the use of electronic communication and teleconferencing to complete our report and meet as a Commission. The rigor of meeting via teleconference for over 50% of our meeting time this year has not come without personal and collective costs. To meet electronically across several time zones and do so without incurring expenses, the Commission has had to rely on phones, internet connections, and computers purchased at individuals' expense. Also, gathering together in person is an important part of our work, because it sustains the projects we undertake as a Commission. Without the opportunity to join hands in worship and meet each other face-to-face on a regular basis, the community building that grounds the COA's work together is jeopardized. During FY2013, we have felt both of these challenges in real ways, seeking creative solutions and supporting each other in a nearly unsustainable budget situation.

After GA, we enter an exploratory year, inviting UUs across the country in helping us select a new topic for our next study. The UUA FY2014 budget proposes a COA budget of \$20,000, which we learned will also be the proposed budget for FY2015. With a full Commission of nine members, this reduction puts forward a more untenable financial constraint on the work of the Commission. And, as we predict the flow of expenses year-to-year during a project, we are considering the possible change of submitting budget requests for multi-year, whole project funding for the Commission in addition to advocating for a more sustainable annual budget for an elected body of nine people.

Leadership development and AR/AO/MC work

Despite the financial setbacks, we carried on with our project and met by teleconference on a regular basis. In our two face-to-face meetings, we shaped our report, outlined our chapters, and created a rigorous timeline for our work together. We continued our internal leadership development work in anti-racism, anti-oppression, and multiculturalism, aided by One Ummah Consulting, which makes use of the Intercultural

Development Inventory (IDI) model used by many groups and organizations, including the UU Ministers Association.

As we described above in the summary of our report, we decided we would center the margins, or in other words, prioritize the voices of participants in the report that come from historically marginalized groups. This helped us shape the outline of the report to deepen an understanding of the cultural context in which ministry and authority take place and respond to the experiences of religious professionals and lay people who are most vulnerable in times of congregational conflict, but also hold particular insights that can benefit the health of all UUs during conflicts over ministry and authority. This new intention also set an agenda for the internal leadership development of the commissioners personally and collectively; we decided to continue the IDI work we began at that meeting that would support our writing of this report and cultivate skills for future projects.

Writing, writing, writing!

By teleconference, we met again in November and December 2012 to check in about our progress in writing the chapters of the report. Because we were financially unable to support our regularly scheduled meeting, we met by teleconference in January 2013 for a marathon “writing week,” collectively (yet not in-person) working draft chapters into final text and submitting the draft to the UUA Publications Office for final edits.

In February 2013, we had another conference call to work through our first edits from the Publications Office. And in early April, we made crucial decisions about the final formatting of the report by conference call as well. In April 2013, we finally met in-person, continue our leadership development in intercultural conflict styles, prepare for transitions in membership, and, of course, produce the manuscript, which we are sharing with you this June.

Sharing our report with you

Moderator Gini Courter has provided us with ample plenary presentation time in which to promote the report and summarize what we have learned. We invite you to learn more about our report at the **Friday Morning Plenary** and help the report come to life in our workshop on **Saturday at 5:30pm in KICC-100**.

At the UUA Bookstore exhibit hall booth, you can purchase a copy of the report and have your book signed by some of the commissioners on **Saturday at 12:15pm**.

Follow the activities of your Commission on Appraisal at www.uua.org/coa, on our **Facebook** page, and on **Twitter @COA_UUA**. Send suggestions for COA's new study that will start next year to coa@uua.org.