UUA General Assembly Off-site Delegate "Mini-trial"
June 2010

Findings and Recommendation

The Off-Site Delegate "mini-trial" at General Assembly 2010 was a success from the point of view of the participants, both off-site and on-site, who felt engaged and positive about the experience, in spite of the use of somewhat primitive technology not designed for that purpose. The question we bring to the Board is whether or not the cost in technology, time, and energy is worth pursuing for a full "dress rehearsal" of the processes and technology in 2011, with "real" voting in 2012.

Recommendation

Implement a complete technology and process solution for Off-Site delegate participation in 2011. Votes will be published but not counted for decision-making until 2012. The solution will address:
- allowing offsite participants to watch, listen, and speak during plenary sessions
- allowing offsite participants to watch, listen, and speak during mini-assemblies
- queuing of offsite participants who wish to speak
- secure credentialing, voting, and tabulation for offsite participants

Analysis for budgeting and scheduling is currently underway.

Objectives of the Trial (set pre-GA)

1. Create momentum and interest on the part of congregations and other GA stakeholders to design and conduct a more rigorous off-site trial for GA 2011.
2. Learn from participants what factors are most conducive and what are most disruptive to the off-site experience.
3. Identify what additional technology would be required for an acceptable off-site experience.
4. Gain insight into who is attracted to off-site participation, both before and after the trial.
5. Identify potential procedural and process barriers to full off-site participation, i.e.: time zones, access to mini-assemblies, delegate credentialing, by-laws requirements, use of technology, etc.
6. Avoid disruption to the physical GA process and minimize incremental expense.

Methodology

Congregations were selected from suggestions from the moderator, and by asking trustees to suggest congregations that would meet the following criteria:

'   have an interest in and identity with the wider UU community
'   have one or more delegate slots not being used by someone physically attending GA
'   are comfortable with and capable of using basic technology (i.e.: will need projector, and Internet connection with enough bandwidth for streaming video and access to sites for voting and communication, and possibly cell connection).
'   have members who are creative and excited about being part of something new, and able to work with untried processes
'   are willing to complete a full evaluation of the experience after GA

Five were selected, representing 12 delegates in 6 sites. One congregation dropped out a few days before the trial started because their delegate slot was taken by someone who decided to attend in person, and we required the participants to be actual delegates, credentialed by the Secretary of the Association. A list of congregations and participants is attached as Appendix A.

A conference call was had with all congregations plus Mark Steinwinter and Tim Brennan from the UUA staff two weeks prior to the trial to finalize the process (see Appendix B). Delegates would use streaming video to follow the proceedings of Plenaries III (Friday morning) and V (Saturday afternoon). Delegates could "speak" via on-site proxies (volunteers from the Young Adult community), and vote online through SurveyMonkey (though the votes would not count). All delegates were sent a "pre", "during", and "post" set of instructions (Appendix C).

An "On-site Proxy Center" was set up during both plenaries, staffed by Linda Friedman, who handled assigning email statements to the on-site proxies, and Christopher Wulff, who kept SurveyMonkey updated with amendments and other changes. Members of the Young Adult Caucus served as proxies, wearing bright green t-shirts with "Off-site Delegate Proxy" on the back.

Learnings

Participant experience

1. Most participants watched the proceedings from their home congregations with other delegates and/or other members who were not delegates.
   * *I liked watching the GA with someone else. It promotes discussion. I liked*

the idea that I could comment, if I wanted.

2. Only one proxy spoke on behalf of a delegate, though at least two more had proxies in line that did not make it to the front to speak, or whose comment was made by someone else. One delegate actually had a proxy in three lines simultaneously. Though this is hardly a representative sample, this is a significantly higher percentage than on-site delegates' experience.
   - *I did not feel compelled to use the proxies to speak, although we did discuss the issues amongst ourselves at the church.*

2. Participants felt engaged, positive about the experience, and the only two who would not want to participate next year are those who already plan to attend GA in Charlotte. Representative comments:

   - *I think to live out our 5th Principle, we need to make the GA process as available to people as possible - regardless of financial situation, physical handicap, employment status (it can be hard for people to take off the time for a GA) etc. To do so, we must make full use of technology such as in this trial.*
   - *I'm excited and pleased that more people may be able to participate in the plenary sessions without the expense of traveling to far-away sites. I think the concept opens all sorts of possibilities for including more delegates and other participants.*
   - *Despite a few technical glitches, it was great being able to watch the plenaries, feel we could "speak" if we wanted, and be able to cast votes on some very important issues.*
   - *It is exciting to think about engaging in the process of UUA governance from afar. We are blazing the trail of the future (although in most other organizations it is history by now).*
   - *I thought it was a very good start - especially for such a short preparation time and no budget.*
   - *This was an awesome beginning! I am proud to have been part of the start. I look forward to seeing where this will take us.*

3. It was difficult for participants to follow rapidly changing developments, such as amendments, amendments to amendments, and procedural votes. The latter were almost impossible for them to participate in because procedural votes would move more quickly than we were able to provide a ballot for.
   - *I was not sure when to vote for the amendments. I have to admit that we got somewhat sidetracked during the debates.*

4. Participants who wanted to be part of the "action" on certain issues were at a distinct disadvantage because they could not participate in the mini-assemblies. We were not always able to provide copies of materials created during GA to the

participants, such as revised resolutions or background material, which made revised motions difficult to follow.

5. Feedback from over 500 respondents to the GA Survey indicates nearly 60% were aware of the trial, and 1.5% (8 people) said it interfered with their GA experience.

Technical Experience

1. The On-Site Center for the trial required a table, Internet access, and an outlet, which was not requested from the GA Planning Committee until two weeks prior to the start of GA. Though this created some concern, the Committee was very responsive and everything was ready when needed.

2. Though off-site delegates were asked to test their streaming video connection and voting link prior to the start of the trial, at least 3 did not, either because they did not have Internet access before the trial, or because they were relying on the leader of the group to do so.

3. Streaming video mostly worked well for participants, once the connection was set up and working.   Delegates could not see the time clock on streaming video.

4. SurveyMonkey more or less worked, but had a number of problems, mostly tied to the need to revise what was on the screen for voting because of amendments or procedural actions, and limits of the technology. This required the delegate to constantly refresh the screen, and depending on connection speed, this could be slow. One congregation attempted to use a single laptop for voting, which resulted in each subsequent delegate over-writing the previous one. Some delegates were not sure what they were voting for, and if they left the voting site between an amendment and the final vote, they were unable to get back in. Here are the results of the votes for the major actions. Click on the link to see the entire vote, including amendments:

Statement of Conscience on Peacemaking	Aye	7	Nay	1
Congregational Study/Action				
Energy, Peace, and Justice	2			
National Economic Reform	2			
Immigration as a Moral Issue	2			
Ending Slavery	0			
Revitalizing American Democracy	1			
Phoenix General Assembly as amended	Aye	3	Nay	0

- *Encountered some problems with Survey Monkey not updated with some pertinent amendments, and, in one instance, Survey Monkey would not*

return to ballot to allow vote on final resolution after voting on an amendment. Also, the speed at which some votes in the hall occur outpace the speed at which Survey Monkey can be updated, refreshed, and then a vote cast (including re-entering name and congregation).

5. Most delegates were satisfied with the support provided by the On-Site Proxy Center.
- *Amazing support - thank you.*
- *Coordinators were extremely helpful--recognizing they were learning through the experience at the same time*

6. Votes for off-site delegates are a number on a screen, for on-site delegates a sea of yellow cards. Combining these two is relatively easy with small numbers of off-site delegates and/or motions that clearly pass or fail, but would not be should either condition change.

7. Off-site delegates received the same survey link sent to all delegates, which confused several of them. They assumed it was the one they were supposed to fill out for the trial, and found most of the questions non-applicable, and then did not fill out the second one.

Other issues/learnings/opportunities

1. Need to insure the GA Planning Committee is aware of and has input into any further activity on this, preferably by including some of their members in the Off-site Planning Team.

2. What are the by-laws requirements for off-site delegates? This is being reviewed by counsel.

3. Is there a way to provide equal access to microphones other than a physical proxy? [Note that this is currently an issue for those with limited mobility as well.] Should we limit off-site delegates to only one line at a time?

4. What would be the cost/benefit of an audio or video link rather than the proxy reading a statement?

5. Off-site delegates provided an easy way to collect signatures for Actions of Immediate Witness: what suffices for an electronic signature?

6. What kind of technology is needed for voting? Can it be linked to the streaming video site? At what point does all voting become electronic? Is a registered device substantially different than a voting card in terms of security?

7. Do mini-assemblies lend themselves to streaming video and off-site participation? What is the cost/benefit of making these available to off-site delegates, or should this be reserved only for those who choose to be physically present?

8. Who is likely to take advantage of off-site delegate status? Are we reaching a segment of our delegates that are unlikely to attend otherwise, such as those with family needs (elder or childcare), those with limited incomes, or limited mobility? Or will this simply tap into those who might have come anyway, giving them a much less rich GA experience? How likely is the availability of off-site delegate status to reduce the number of on-site delegates?

9. Need to distinguish between on and off-site delegates in follow-up surveys.

10. Need to insure that participants in any subsequent trials understand pre and post activities apply to everyone, not just the person in their congregation who asked them to be part of the trial. May need to separate "leader" vs. "everyone" instructions.

<u>Off-site GA Delegate Planning Team</u>

Rev. Randy Becker	UU Fellowship of Key West
Christopher Wulff	Continental UU Young Adult Network
Mark Steinwinter	UUA Staff
Tim Brennan	UUA Staff
Lew Phinney	UUA Board
Linda Laskowski	UUA Board

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