

Final Report of the Social Witness Process Review Panel April 2004

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The Review Panel thanks former Moderator Diane Olson for convening and leading our group for our first year, and current Moderator Gini Courter for her continued support. We also want to acknowledge the contributions to our work of UUA staff members Taquiena Boston, John Hurley, and Susan Leslie, and the many individuals who gave us feedback along the way.

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I. INTRODUCTION

Since 1961, the procedure used by the Unitarian Universalist Association of Congregations for taking stands on social justice issues (hereafter called the social witness process) has changed several times. From 1961 to 1986, the UUA had General and Business Resolutions. General Resolutions became policy after a two-year process that included congregational review. Several Business Resolutions addressed topics of social witness. Copies of all social witness statements issued by the Association can be reviewed at www.uua.org/actions. The Association adopted its last General Resolution in 1997. Our current Study/Action Issue process is relatively new, having been adopted at the 1996 Indianapolis General Assembly and implemented at the 1997 GA in Phoenix. A task force chaired by Patsy Sherrill Madden developed this new process.

In 1987, the Resolution of Immediate Witness made its debut. Ten years later, in 1997, Resolutions of Immediate Witness became Actions of Immediate Witness, though the process remained essentially the same. Actions of Immediate Witness are proposed and voted on at the same General Assembly. They deal with issues that are time-sensitive. Since they are not subject to congregational review, they are not considered policy of the Association—just the viewpoint of the General Assembly itself. They must be passed by a two-thirds vote. A task force on the Actions of Immediate Witness Process, chaired by Brad Brown, developed a series of recommendations following the 1999 General Assembly. One major recommendation, reducing the number of Actions of Immediate Witness admitted to the Final Agenda from 6 to 4, was defeated at the 2000 General Assembly.

In the fall of 2002, the Social Witness Process Review Panel was gathered by UUA Moderator Diane Olson. Our group was formed to address expressed dissatisfactions (elaborated below in Section II) with the current process. Our hope was to explore how best to help congregations and the Association develop a public voice, and equip individuals, congregations, and UU organizations for effective action.

During the course of our work, Diane Olson resigned from the office of Moderator. With the encouragement of current Moderator Gini Courter and the UUA Board, we continued our work with different panel members playing the role of convener and recorder at different times. Our initial conference call occurred in October 2002. In the eighteen months that followed, we had four face-to-face meetings and more than 10 conference calls. We also worked together at the 2003 General Assembly to survey GA delegates and conduct a hearing for those who wished to comment on our task and the social witness process.

We spent hours on phone interviews with representatives of other religious organizations to learn about their social witness processes. We dedicated a day for a very helpful in-person meeting with Washington representatives of the American Baptist Churches-USA, the Religious Action Center of Reform Judaism, and the United Church of Christ. Some of our recommendations were inspired in part by their best practices.

In January 2004, we released a preliminary report entitled “The Direction We Are Going” to encourage early feedback from a variety of stakeholder groups and interested UUs. As a result of that feedback, we reviewed our recommendations, affirming some, amending some and dropping others.

Our final recommendations propose changes in both the Study/Action Process, including Statements of Conscience; and the Actions of Immediate Witness Process. We also recommend a new component, which we call Public Policy Statements.

II. THE PROBLEMS WE WERE ASKED TO SOLVE

To help readers understand how the Review Panel came to our conclusions, this section reviews our understanding of the problems we were asked to solve, and who defined these problems.

A. GA participants would like guidance for their social justice work from the current process and are not getting it.

The Review Panel' was convened by Moderator Diane Olson shortly after she read the evaluation forms from General Assembly 2002. Participants revealed that they were confused by the debate process, frustrated that amendments to statements took all of the body's time, and uncertain that the process had anything to do with their congregation's social witness work. Indeed, surveys from the 2003 General Assembly bore this out (see the attached Survey Summaries for the full results):

- When asked how their participation in the current social witness process at General Assembly affects their local congregation's programs, 56% said it had very little or no effect, with only 5% saying it had a considerable effect.
- When asked to what extent plenary debate on Study/Action Issues clarifies how their congregation can do effective work on the issue selected, only 33% ranked its effect as "considerable" or "somewhat considerable." 28% reported it average, and 39% below average.
- When asked to what extent plenary debate on Study/Action Issues **should** clarify how their congregation can do effective work, 69% ranked it as "considerable" or "somewhat considerable."
- When asked what the primary purpose of the social witness process should be, 89% felt that it is "To provide congregations nationwide with vehicles to collaborate and rally around common issues." 67% ranked it most important, and 22% high importance.

Clearly, congregations come to GA to learn to be more effective in their social witness work, and they don't feel that the current process helps them to do so.

B. Most congregations do not get involved with the current process.

Currently, participation in the Congregational Directives Survey (known informally as the parish poll) hovers around the 20% mark. That is to say, only about 20% of the congregations participate in this phase of the social witness process. Understanding that the Study/Action Issues which come to GA may receive less than majority support (because they are selected from a large group of applicants), a statement may arrive with only a fraction of our congregations having actively supported it!

Even among those congregations committed enough to the larger movement to have delegates attend General Assembly, involvement is not high. Using a grading scale with 5 representing 'very high' and 1 representing 'completely inactive,' participants were asked: How would you rank your congregation's current participation in the social witness process, including the proposal of the Study/Action Issues, voting in the Congregational Directives Survey, submitting comments, and discussing how your delegates might vote at GA? Their answers broke down as follows:

- 4% ranked it 5 (very high);
- 9% ranked it 4 (high);
- 19% ranked it 3 (average);
- 43% ranked it 2 (below average), and
- 24% ranked it as 1 (completely inactive).

This means that 67% of congregations ranked their participation in the social witness process as below average.

When asked about key factors for their non-participation, and invited to check all that applied:

- 38% said they're too busy with local concerns
- 33% said they don't know about it
- 17% said they don't care about denominational business
- 10% said the process is too complicated
- 1% said they don't think the UUA should make statements about social justice.

C. The current system is frustrating for UUA staff in their program work on behalf of the Association.

The staff whose work is most related to the social witness process also have their share of frustrations, including that:

- Long, detailed, complex statements are not useful with either the media or with policy advocacy work.
- Statements of Conscience vary radically, both in topic and content, from one year to the next, with no glance to the past. Advocacy work, to be effective, takes a number of years in order for staff to learn the nuances of the issues, produce UU-centered materials or find existent ones which are appropriate for our congregations, gain credibility in coalitions, and build relationships which will allow success. This is simply not possible when the topic is prison reform one year and globalization the next—staff members experience the trajectory of statements as “random.”
- While the statements are useful in providing the outer parameters of public stands which staff members are able to make, because they do not involve any discussion of how it fits into existing work the statements do not set priorities or strategic direction. In the words of former GA Office Director Barbara Prairie, “A question to consider is whether GA should initiate particular social action, or put a cap on it. Our current system appears to do the latter...” This in turn is frustrating to delegates, who ask, as one did during a 2003 open hearing on the Commission on Social Witness process, “If we don't have staff and resources to act on Statements of Conscience, why should we develop them at all?”

D. The current system is frustrating to the volunteer leaders who serve on the Commission on Social Witness.

The volunteer UUs who comprise the commission have, over a number of years, felt that the demands on them at General Assembly make it impossible for them to be effective in their work. A hardworking and dedicated group, they bemoan the lack of involvement by congregations and the lack of implementation by the UUA staff, but still willingly endure the innumerable stressful hours of work which they are required to carry out at each General Assembly in order to allow the process to function. But then they are frustrated by the response of delegates that, in the words of one person at an open hearing on the Commission on Social Witness process, “I am troubled by the lack of transparency of the Commission on Social Witness process at GA. It seems like too much of the work is done behind closed doors between public meetings.”

II 1/2. ONE PROBLEM WE WERE NOT ASKED TO SOLVE

During the course of our work, at the initiation of President Sinkford and the UUA General Assembly Planning Committee, a conversation about the meaning and purpose of the General Assembly has begun. The outcome of this conversation is not clear as we complete this phase of the work on our social witness processes. We do recognize that since one of the purposes of General Assembly is to give voice to our congregations' social witness concerns, and since the Association invests substantial time to the social witness process at General Assembly, therefore any conversation about the meaning and purpose of GA must necessarily take these recommendations into account. We have also tried to anticipate possible new directions for the purposes of General Assembly. Our recommendations are ones that could work within the context of the present structure for business at GA. However, they could also work with an annual General Assembly model which would alternate major time devoted to formal business issues with major time devoted to program, training, and networking for congregation leaders.

While our Panel was not charged with making recommendations for the structure and content of the General Assembly, and we have not included any such recommendations within the body of our report, we encourage the Planning Committee, the Board, and the staff to consider the possibility of rotating through a business and then a program/training focus in alternate years.

III. SUMMARY OF OUR RECOMMENDATIONS

A. The Study/Action Process, including Statements of Conscience

The Review Panel proposes this definition:

The purpose of the Study/Action Process is to provide the Unitarian Universalist Association of Congregations with a shared agenda, whereby energy, ideas, and resources are rallied around a common issue. The end result will be a deeper understanding of our religious position on the issue, a clear statement of Association policy as expressed in a Statement of Conscience, and a greater capacity to take effective action.

The Panel recommends the following changes in the Study/Action Process (please see attached table "*Side-By-Side of the Current and Proposed Study/Action Process*" for a graphic representation):

1. The entire Study/Action Process would be extended to encompass four General Assemblies with three years of work between them, rather than the current model which spans three General Assemblies with two years of work between them. Our recommendations envision that GA would alternate between business and program as follows:
 - GA 1 would select the issue;
 - GA 2 would be for study and skills building;
 - GA 3 would consider the Statement of Conscience (and select a new issue); and
 - GA 4 would be about implementation.

A new Study/Action Issue would be selected every two years, not every year as in current practice.

2. In addition to congregations and districts, proposed Study/Action Issues could be submitted by associate members organizations, sponsored organizations, independent affiliates and UUA staff.
3. The maximum number of Study/Action Issues that the Commission on Social Witness could place on the Tentative Agenda for consideration by congregations would be reduced from ten to seven.
4. The "Congregational Directives for General Assembly Action" survey, through which the tentative agenda is considered, would be renamed the "Congregational Poll." The number of proposed Study/Action Issues admitted to the General Assembly agenda would be reduced from five to three. A quorum of 25% of congregations participating in the poll would be required. If the quorum is not met, a new issue would not be selected at General Assembly.
5. The Study/Action Issue selection process at General Assembly would not change, although the Commission on Social Witness and staff would encourage delegates to discuss and vote on the issue in terms of the grounding, fit, and opportunity the issue has for their congregation and the Association.

6. Following this first General Assembly, the Commission on Social Witness would form a Study/Action Issue Resource Panel, consisting of five to seven knowledgeable people who would guide Unitarian Universalist involvement on the selected study topic. This panel of experts on the issue would assist with study and implementation, including:
 - Gathering ideas and resources;
 - Arranging for programs at subsequent General Assemblies;
 - Preparing a report on the issue (that would not be voted on); and
 - Preparing a draft Statement of Conscience that would be considered by congregations and potentially the GA.
7. At the second GA, various programs, workshops, and hearings are held on the issue, organized by Commission on Social Witness, Resource Panel, and staff. The Resource Panel would meet immediately after GA to start drafting its report and the Statement of Conscience. The report would be an in-depth consideration of the issue that explores our history and theology. It would not be amended or voted on by General Assembly, just presented. The Statement of Conscience, consisting of a short (2-3 paragraphs) narrative, position statement, and concise calls to action, would be subject to debate and approval.
8. A congregation-based affirmation of the draft Statement of Conscience would be added to the process. Prior to the third GA, the draft text of the Statement of Conscience would be placed on the Congregational Poll. In order to be considered at GA, it would need to be approved by a 2/3rds vote. Again, we propose a quorum requirement (participation from at least 25% of certified member congregations) in order for the draft Statement to advance to General Assembly. Failure would refer the draft back to the Commission on Social Witness. The Review Panel believes that this quorum should be consistent for all GA business.
9. At the third GA, the amendment work on the Statement of Conscience would occur in working groups, replacing our current mini-assemblies. We envision multiple small group processes for discussion of the broad themes of the Statement of Conscience and hearing concerns that could result in amendments. These small group discussions would feed into a crafting session for a final version of the Statement of Conscience. This version would be presented to the entire GA, along with a report on the discussion and changes made. It would not be amendable on the GA floor, just debated and voted on with a two-thirds vote required for approval.
10. If a Statement of Conscience fails to attract two-thirds of the delegates' votes, but has more than 50%, a motion to recommit the draft text to the Commission on Social Witness would be in order. Having the Study/Action process extend over three years and four GAs allows for the fourth GA in the cycle (during which we would ideally have focused on implementation) to be available as a failsafe in the event that a Statement of Conscience is referred for an additional year of study. The Commission on Social Witness may redraft the text and place it on the Tentative Agenda for the Fourth GA.
11. If a Statement of Conscience is approved at the third General Assembly, a major component of program time at the fourth GA would be devoted to implementation. In cases where a Statement of Conscience required a fourth year for approval, there would be less programming at the subsequent GA (the fifth GA) on implementation.

B. ACTIONS OF IMMEDIATE WITNESS

The Review Panel proposes this definition:

An Action of Immediate Witness is a public statement and call to action on a social justice issue that is too timely and specific to be addressed in the Study/Action Process. Because they are never considered by congregations, Actions of Immediate Witness are not Association policy, just the expressed opinion of that particular General Assembly.

The Panel recommends the following changes to the Action of Immediate Witness process (please see attached table "*Side-By-Side of the Current and Proposed Action of Immediate Witness Process*" for a graphic representation):

1. Actions of Immediate Witness can be submitted by individual delegates present at General Assembly, and also congregations, districts, UUA associate member organizations, sponsored organizations, independent affiliate organizations, and UUA staff. The current criteria (timeliness, specificity, narrowness of focus) would be expanded to include grounding, fit, and opportunity. Factual documentation would be required.
2. Actions of Immediate Witness could be submitted by congregations or organizations by June 1 preceding the General Assembly. Individual proposals would not be eligible for early submission. If the proposals were factually accurate and met all other criteria, they would be exempt from the petition process at GA. Actions of Immediate Witness could also be proposed at General Assembly as in the current model.
3. At General Assembly, the Commission on Social Witness would determine which proposals met the established criteria and place all of them on the tentative agenda. Each delegate would vote for six, and the six proposals receiving the most votes would be admitted to the Final Agenda. They would be considered in order according to which proposal received the most votes.
4. As with the Statement of Conscience process described above, the amendment work on the final draft of the Actions of Immediate Witness would happen in GA working groups replacing our current mini-assemblies. The Commission on Social Witness would no longer edit the texts of Actions of Immediate Witness. The General Assembly would not consider amendments, but would debate and vote up or down the texts recommended from the working group process, with a two-thirds vote necessary for approval.
5. The Panel recommends that a procedure be developed for reviewing/sun-setting old Actions of Immediate Witness.

C. PUBLIC POLICY STATEMENTS

The Review Panel proposes this definition:

A Public Policy Statement is a clear and concise summary of the UUA position on a given issue.

To discern the UUA's position on a given issue, Association staff, UUs, or the general public must comb through all of the relevant statements. To greatly simplify this process, and give both staff and the public a clear presentation of the Association's position, the Panel has proposed a new level of social witness process and statement.

1. We recommend the creation of UUA Public Policy Statements, which would be living documents based on positions taken by our General Assembly. They would be drafted, approved, and amended through staff, Board, and occasionally General Assembly action.
2. Public Policy Statements would be based on positions already taken by the General Assembly. They would begin with a few paragraphs of narrative text that would form a historical and theological context, followed by a section of concise statements summarizing our positions on particular social issues that cluster under this theme.
3. Public Policy Statements would be reviewed and affirmed only by the Board of Trustees, since they are rooted in previous positions already voted by the General Assembly with a two-thirds majority necessary for approval. Staff could also propose changes to an existing Statement in order to respond to emerging issues, provided that the amendments are in accordance with existing policy. All approved Statements and amendments would be reported to General Assembly.
4. If staff brings to the Board a new Public Policy Statement or proposes an amendment to an existing Public Policy Statement which the Board feels is not rooted in or justified by previous General Assembly statements, the Board has two options:
 - a. It can decline to approve the draft Public Policy Statement or amendment, referring it back to staff for further work (or submission as a Study/Action Issue or Action of Immediate Witness); or
 - b. It can refer the Public Policy Statement or amendment directly to the General Assembly. The text would not be subject to amendment, just debate and an up-or-down vote with two-thirds required for approval.

IV. FULL EXPLANATION OF RECOMMENDATIONS WITH RATIONALE

A. Study/Action Process, including Statements of Conscience

The Review Panel proposes this definition:

The purpose of the Study/Action Process is to provide the Unitarian Universalist Association of Congregations with a shared agenda, whereby energy, ideas, and resources are rallied around a common issue. The end result will be a deeper understanding of our religious position on the issue, a clear statement of Association policy as expressed in a Statement of Conscience, and a greater capacity to take effective action.

Each General Assembly selects one Study/Action Issue (SAI) for two years of congregational study, action, and reflection, possibly resulting in a UUA Statement of Conscience being adopted. In *A Proposer's Guide to Social Witness*, the Commission on Social Witness explains:

Each year, the Commission on Social Witness receives proposals from congregations and districts for Study/Action Issues, each hoping theirs will be selected and will eventually result in a UUA Statement of Conscience. The Study and Action Process was created to uphold our principles and to engage Unitarian Universalists in the articulation of conscience on pressing social justice issues. The process is initiated by congregations and districts and ends with the delegates at General Assembly.

Statements of Conscience are not defined by the bylaws or rules of the Association. In *A Proposer's Guide to Social Witness*, the Commission on Social Witness states, "Adopted Statements of Conscience shape the meaning of contemporary Unitarian Universalism, empower the Washington Office on Advocacy to lobby our positions in pending legislation, and serve congregations and other UU groups in local efforts." To date, the following SOCs have been adopted:

- 1999 – Beyond Religious Tolerance: The Challenges of Interfaith Cooperation Begins with Us
- 2000 – Economic Injustice, Poverty, and Racism: We Can Make A Difference
- 2001 – Responsible Consumption is Our Moral Imperative
- 2002 – Alternatives to the War on Drugs
- 2003 – Economic Globalization

Review Panel Recommendations

Please see the attached table "Side-By-Side of the Current and Proposed Study/Action Process" for a graphic representation of our recommendations.

1. Frequency of Initiation

Current Process: A new Study/Action Issue is selected every year.

Proposed Change: A new Study/Action Issue would be selected every other year.

Rationale: This change responds to many voices calling for slowing down the process so congregations, districts, and others have more time to fully engage each issue, and staff have more time to provide effective resources and support. The Study/Action Process would also include a fourth year that would focus on implementation of the newly adopted UUA Statement of Conscience.

2. Who Can Propose a Study/Action Issue

Current Process: Only congregations and districts can propose Study/Action Issues.

Proposed Change: In addition to congregations and districts, a Study/Action Issue could also be proposed by:

- Associate Member Organizations: UU Service Committee, UU United Nations Office, and UU Women's Federation;
- Sponsored Organizations: YRUU (Young Religious Unitarian Universalists) and C*UUYAN (Continental Unitarian Universalist Young Adult Network);
- Independent Affiliate Organizations: Such as Unitarian Universalists for a Just Economic Community; Unitarian Universalists for Drug Policy Reform; the UU Seventh Principle Project; and many others; and
- UUA Staff: Advocacy & Witness, Identity-Based Ministries, and others.

Rationale: The number and quality of proposals varies widely from year-to-year, and prevents groups with a high level of interest in the process from participating. The Review Panel believes that allowing the above-named groups to participate will increase the diversity and quality of options, and promote buy-in, rather than frustration, from these key stakeholders—many of who respond to congregational interests and offer significant resources for implementation. In the GA 2003 surveys, support for allowing these additional groups to propose Study/Action Issues was strong, ranging from 58% for Independent Affiliates to 78% for Sponsored Organizations.

3. Maximum Number of Proposed Study/Action Issues on the Tentative Agenda

Current Process: The Commission on Social Witness can place up to **ten** proposed Study/Action Issues on the tentative agenda for General Assembly.

Proposed Change: The Commission on Social Witness can place up to **seven** proposed Study/Action Issues on the tentative agenda for General Assembly.

Rationale: The Review Panel felt that reducing the maximum from ten to seven would help congregations have more productive conversations about the proposals.

4. From Tentative Agenda to Final Agenda

Current Process: Congregations are sent the tentative agenda and asked to select up to **five** proposed Study/Action Issues to be considered at General Assembly. This process is called the "Congregational Directives for General Assembly Action" survey.

Proposed Change: Congregations are sent the tentative agenda and asked to select up to **three** proposed Study/Action Issues to be considered at General Assembly. We propose renaming this process the "Congregational Poll." Also, we propose a quorum requirement (participation from at least 25% of certified member congregations) in order for the tentative agenda to become the final agenda, and thus considered at General Assembly. If the quorum is not met, a new Study/Action Issue will not be selected.

Rationale: The Review Panel felt that reducing the maximum from five to three would help congregations have more productive conversations about the proposals and lead to deeper, more meaningful consideration at General Assembly. The Review Panel recommends a quorum to recognize the importance of this process, and bring it in-line with the guidelines recommended by the UUA Congregational Services Staff Group in the Congregational

Handbook (see <http://www.uua.org/cde/handbook/>). The Panel believes that this quorum would also mobilize proponents of a particular proposal to organize other congregations to support it. [Note: the Panel would like to see a 25% quorum requirement for all General Assembly business, not just social witness-related items, but that is beyond the scope of our charge.]

5. Consideration at General Assembly

Current Process: In plenary, delegates select one issue (out of up to five) as the Study/Action Issue for the next two years.

Proposed Change: In plenary, delegates select one issue (out of up to three) as the Study/Action Issue for the next two years. As started at GA 2003, the Commission on Social Witness and UUA staff would encourage delegates to focus on which proposed Study/Action Issue offers the best grounding, fit, and opportunity for adding the Unitarian Universalist voice to the public debate:

- **Grounding:** Does it have authentic and deep UU roots? Does it link to current identity and theology of UUs?
- **Fit:** Is there a match between our resources, aspirations, and ability to make a real difference?
- **Opportunity:** Is there a likelihood that we can be a respected participant in the public dialogue on this issue?

Rationale: By articulating criteria for Study/Action Issue selection, we hope to shift the conversation in ways that respond to what, according to the surveys done at GA 2003, participants want to get out of it. While 80% of respondents believe that “the plenary debate on Study/Action Issue selection [should] offer... a better sense of UU identity and history,” only 64% felt that was happening now. An even wider gap is clear in “how much the plenary debate on Study/Action Issue selection [clarifies how individuals and congregations] can do effective work on the issue selected:” 69% think it should, and only 33% think that it is happening now.

6. Following the First General Assembly

Current Process:

- a. Immediately following General Assembly, a preliminary Study/Action Issue Resource Guide is mailed to all congregations. A final Study/Action Resource Guide is mailed to all congregations by the First Friday in October.
- b. The Resource Guide is created by staff with input from the Commission on Social Witness.
- c. Congregations and districts are encouraged to submit feedback on the issue by March 1.

Proposed Change:

- a. Immediately following General Assembly, a preliminary Study/Action Issue Resource Guide would be made available (though not necessarily mailed) to all congregations. A final Study/Action Issue Resource Guide would still be mailed to all congregations in the fall.
- b. Also, following this first General Assembly, the Commission on Social Witness would form a Study/Action Issue Resource Panel, consisting of five to seven knowledgeable people who would guide Unitarian Universalist involvement on the selected study topic. Resource Panel members, a majority of whom would be Unitarian Universalists, would have special knowledge or interest in the topic under consideration and/or grounding in Unitarian Universalist theology, history, and polity. The Commission on Social Witness, in collaboration with the Advocacy and Witness Department, would facilitate the work of the Resource Panel.

The Resource Panel will meet two or three times - once in the fall following the First GA, then again at the Second GA, and possibly once again to review comments on the draft Statement of Conscience. At its initial meeting after the First GA, the Resource Panel would help frame the issues associated with the topic and identify additional resources for inclusion in the final Study/Action Issue Resource Guide. Although much of its work would be through email and conference calls, the Review Panel recognizes that this proposal has substantial budgetary implications.

- c. In addition to congregations and districts, feedback would also be accepted from UUA associate member organizations, sponsored organizations, independent affiliate organizations, and UUA staff. The Commission on Social Witness would share this feedback with the Resource Panel.

Rationale:

- a. We propose eliminating the requirement that a preliminary guide be mailed immediately after General Assembly (as opposed to posted on the web) to reduce the impact on staff time and budget, and because too few congregations are active enough in the summer to justify the time and expense.
- b. We propose the creation of a Resource Panel in order to provide an official structure for those who know most about the issue to help the Association develop resources and policy around it. Currently, all this work falls on the Commission on Social Witness and staff, who may (but often do not) have any expertise on the given topic. Having a group of experts dedicated to the task would, we believe, lead to a deeper, more effective end product than is currently possible.
- c. We believe that all groups allowed to propose Study/Action Issues should be allowed to submit official feedback (see Number 2 on page 11 for that rationale).

7. The Second General Assembly

Current Process: The Commission on Social Witness holds a workshop on the issue, presenting the result of feedback and soliciting more. A new Study/Action Issue is also selected.

Proposed Change: Significant programming time would be dedicated to the Study/Action Issue, drawing on the work of the expert panel and with an emphasis on what activities congregations, districts, and other UU groups have undertaken. A new Study/Action Issue would **not** be selected. The Review Panel envisions GA Two to be a “program” rather than “business” GA. This would require a substantial change in the culture and business of General Assembly that is beyond our charge to envision. No new Study/Action would be selected.

Rationale: A single hearing is not sufficient to “provide congregations nationwide with vehicles to collaborate and rally around common issues,” as 89% of survey respondents think it should. The rationale for not selecting a new Study/Action Issue is explained in Number 1 above (see page 10).

8. Following the Second General Assembly

Current Process:

- a. The Commission on Social Witness prepares a draft Statement of Conscience (form undefined), which is mailed to all congregations by the first Friday in October. Current Statements tend to range from three to four pages in length.

- b. Congregations and districts are encouraged to submit feedback on the issue by March 1.

Proposed Change:

- a. We recommend defining the written end product of this process more concisely. We envision two distinct parts. The first, in the form of a report, would be a longer, narrative document that provides general background information on the issue and analysis of how it intersects with Unitarian Universalism. The second part, the Statement of Conscience itself, would be less of a report and more of a “call to action.” It would start with a brief narrative summarizing why the issue should be addressed by Unitarian Universalists, continue with a position statement, and then lay out recommended actions in a list of concise statements. Only the Statement of Conscience language would eventually be subject to debate, amendment, and adoption. The report would simply be submitted. The Study/Action Issue Resource Panel and Commission on Social Witness would work collaboratively on both products, with the Resource Panel taking the lead on the report and Commission on Social Witness taking the lead on the Statement of Conscience.
- b. In addition to congregations and districts, feedback would also be accepted from UUA associate member organizations, sponsored organizations, independent affiliate organizations, and UUA staff.

Rationale:

- a. The Review Panel believes that clearly defining the written end product of the Study/Action Process will be helpful to all involved. We believe that the end product should include both a deeper examination of the issue and a concise call to action, and that it has not worked to achieve both aims in the same document. In particular, we hear many complaints that current Statements of Conscience are too long.
- b. Again, we believe that all groups allowed to propose Study/Action Issues should be allowed to submit official feedback (see Number 2 on page 11 for that rationale).

9. From Tentative Agenda to Final Agenda

Current Process:

- a. The Commission on Social Witness edits the draft Statement of Conscience based on this feedback and places it on the tentative agenda for General Assembly.
- b. The tentative agenda is mailed to all congregations, but no action is needed for the draft to be admitted to the final agenda of General Assembly.

Proposed Change:

- a. The Commission on Social Witness, with input from the Resource Panel, edits the draft Statement of Conscience based on this feedback and places it on the tentative agenda for General Assembly.
- b. The tentative agenda is mailed to all congregations on the renamed “Congregational Poll.” We recommend that congregations vote on whether or not the draft Statement of Conscience should be placed on the final agenda, with a requirement that more than two-thirds must agree in order for it to advance. Again, we propose a quorum requirement (participation from at least 25% of certified member congregations) in order for the tentative agenda to become the final agenda, and thus considered at General Assembly. Failure would refer the draft Statement back to the Commission on Social Witness.

Rationale:

- a. The Review Panel recommends involving the Resource Panel in drafting the Statement of Conscience for the same reasons we favor having a Resource Panel (See number 6 above for that rationale).
- b. We believe that having congregations vote on whether or not to send the draft to General Assembly recognizes that congregations should have a greater say in the social witness process. We also believe that it will increase participation in the Congregational Poll, because it raises the importance of decisions made through it. Although 60% of survey respondents thought that the Statement of Conscience Process “allows sufficient opportunity for congregational and district input,” the fact that only 13% reported being involved in the process suggests that changes are necessary.

10. The Third General Assembly

Current Process:

- a. A mini-assembly (currently lasting three hours) is held to debate the substance of the proposed Statement of Conscience. Amendments are offered during the mini-assembly, but not voted upon (although non-binding advisory votes are sometimes taken).
- b. Following the mini-assembly, the Commission on Social Witness meets to consider all amendments and develop a final version of the Statement which is considered at plenary.
- c. Amendments not incorporated into the final version of the Statement may be offered during plenary debate. Passage requires a two-thirds vote.

Proposed Change:

- a. The mini-assembly process will be replaced by a working group process that moves away from large-group parliamentary procedure towards smaller, informal conversations. While the Review Panel is not recommending a specific format, we envision it working something like this: People interested in discussing the proposed Statement of Conscience would gather in a room or series of rooms. Each group would be led by a moderator who has been recruited and trained by the Commission on Social Witness. Following a brief presentation to the whole group, small groups would be formed to have in-depth discussion and propose changes. Each small group would report on its conversations and suggestions and also elect a representative for the drafting team.
- b. Following the working group meeting, the drafting team—supported by the Commission on Social Witness—would meet to consider the recommendations and develop a final version of the Statement which would be considered at the plenary.
- c. The final language which would appear before the General Assembly would not be subject to amendment, just debate and an up-or-down vote with two-thirds required for approval.
- d. If the vote on passage of the Statement of Conscience falls short of the two-thirds margin, but is more than fifty percent, a motion to recommit the draft text to the Commission on Social Witness would be in order. The Commission on Social Witness may redraft the text and place it on the Tentative Agenda for the fourth GA.

Rationale:

- a. The Review Panel believes that working groups, by giving more people a meaningful voice, will result in deeper, more productive conversation, and make this aspect of the Statement of Conscience process significantly more compelling to delegates. We believe that it will require a significant cultural shift, but one that it is for the best and consistent with the emphasis on small group ministry happening throughout the Association. Also, because the length and scope of the Statement of Conscience are clearly defined, these discussions will be easier.
- b. Placing responsibility for drafting a final version in the hands of Commission on Social Witness alone puts enormous pressure on that group, and has led to great frustration with the lack of transparency. We believe that placing responsibility for drafting a final version in the hands of delegates chosen by delegates makes the process more open and accountable. This team would still need support from the Commission on Social Witness, although having the length and scope of the Statement of Conscience clearly defined will make these deliberations much easier than what the Commission must do now.
- c. The Review Panel believes that the limited plenary time available is best spent discussing the overall merits of the Statement of Conscience and its impact on the UUA and the world. While only 18% of survey respondents felt that “No Amendments should be considered in plenary; that should be settled elsewhere;” and 52% felt “Only amendments proposed in a mini-assembly should be allowed in plenary,” the Panel feels strongly that the process of considering amendments during plenary creates incredible frustration and takes time away from the larger, and in our opinion more important questions.
- d. The Review Panel felt that it was important to have a clearly-defined deferment option. Our recommendation gives flexibility to the Commission on Social Witness to bring the issue back if they see fit.

11. The Fourth General Assembly

Current Process: The UUA staff is required to report on the implementation of Statements of Conscience, with particular emphasis on the most recent one. There may be programs related to the Statement, but none are required.

Proposed Change: The focus of this fourth GA would be on implementation of the recently adopted Statement of Conscience, with multiple workshops and plenary presentations showcasing what congregations, districts, the UUA, and other UU groups have done. In cases where a Statement of Conscience required a fourth year for approval, there would be less programming at the subsequent GA (the fifth GA) on implementation.

Rationale: The lack of a clear vehicle for congregational implementation has been a major criticism of the current process. This has been especially frustrating for UUA staff, who are viewed as having this responsibility, yet have no additional resources with which to do so and no proportional workload reduction. The Review Panel believes that having a fourth General Assembly to focus on implementation will ensure that the end result of the Study/Action Process is not simply a piece of paper, but an Association of Congregations with a new (or renewed) commitment to a particular justice issue with the skills and inspiration to make a difference. The Review Panel believes that this Fourth General Assembly will help foster the recognition that it is congregations—not staff—who make up the Association, and thus bear primary responsibility for implementation. Indeed, this is the only way the process can truly be effective.

B. Actions of Immediate Witness

The Review Panel proposes this definition:

An Action of Immediate Witness is a public statement and call to action on a social justice issue that is too timely and specific to be addressed in the Study/Action Process. Because they are never considered by congregations, Actions of Immediate Witness are not Association policy, just the expressed opinion of that particular General Assembly.

The Action of Immediate Witness process gives General Assembly delegates the opportunity to address urgent social justice issues they deem important through a democratic process initiated at GA. Because Actions of Immediate Witness are statements from the delegate body temporarily assembled, the Actions of Immediate Witness passed at GA are the least authoritative of all our statements. The distinction is in procedure. While Study/Action Issues are initiated by congregations or districts and go through an extended period of study and action, there are no parallel opportunities for Actions of Immediate Witness. Actions of Immediate Witness are initiated by individuals and move through the creation and adoption process in the course of a single GA. Therefore, Actions of Immediate Witness do not have the authority of the UUA overall, only the General Assembly that adopted them.

Challenges of the Current Process

- Many delegates feel that the plenary is not sufficiently empowered regarding which Actions of Immediate Witness (six maximum) make it to the plenary floor. The Commission on Social Witness is seen as having too much power in determining this. Delegates want a more transparent process that gives them more power of choice.
- The current process doesn't permit solid fact checking, allowing an Action of Immediate Witness to reach the plenary floor with no documentation.
- Most delegates do not attend any of the mini-assemblies.
- There is commonly delegate confusion about the amendments proposed during the mini-assemblies. Many delegates understand that all these amendments should somehow be included in the draft proposed on the plenary floor. They are increasingly frustrated that the allotted debate time doesn't always allow for the consideration of each of the unincorporated amendments.
- According to the surveys, 72% think that the plenary debate on Actions of Immediate Witness should "offer...a better sense of UU identity and history," but only 58% think it does now. Even more significantly, 77% believe that the plenary debate should "clarify how [they] can do effective work on the Actions of Immediate Witness that are approved," and only 40% think that it does now.
- Actions of Immediate Witness are often unrelated to other public witness work done in our denomination.
- There is no structure for reviewing or sun-setting outdated Actions of Immediate Witness.

Review Panel Recommendations

Please see the attached table “Side-By-Side of the Current and Proposed Actions of Immediate Witness Process” for a graphic representation of our recommendations.

1. Criteria

Current Process:

- Immediate relevance
- Clearly defined and focused, addressing a single, specific topic or circumstance
- Too narrow in focus to merit the extended study/action time warranted by a SAI

Proposed Change: The current criteria for Actions of Immediate Witness (timeliness, specificity, narrowness of focus) should be expanded to include:

- **Grounding:** Does it have authentic and deep UU roots? Does it link to current identity and theology of UUs?
- **Fit:** Is there a match between our resources, aspirations, and ability to make a real difference?
- **Opportunity:** Is there a likelihood that we can be a respected participant in the public dialogue on this issue?

Rationale: The Review Panel has heard considerable feedback from individuals who are frustrated that Actions of Immediate Witness are judged by the importance of the issue in a general sense, rather than whether or not (and why) the Unitarian Universalist Association should be speaking on it. The Review Panel believes that these new criteria will change this, and significantly improve the plenary debate. According to the surveys, 72% think that the plenary debate on Actions of Immediate Witness should “offer...a better sense of UU identity and history,” but only 58% think it does now. Even more significantly, 77% believe that the plenary debate should “clarify how [they] can do effective work on the Actions of Immediate Witness that are approved,” and only 40% think that it does now.

2. Who Can Propose

Current Process: Although the UUA By-laws do not specify who can propose, the informal rule has been that it must come from an individual member of a Unitarian Universalist congregation who is present at GA.

Proposed Change: We recommend a stated policy that would allow proposals to come from individual delegates present at General Assembly, and also congregations, districts, UUA associate member organizations, sponsored organizations, independent affiliate organizations, and UUA staff.

Rationale: As with Study/Action Issues, the Review Panel believes that allowing the above-named groups to participate will increase the diversity and quality of options, and promote buy-in, rather than frustration, from these key stakeholders—many of who respond to congregational interests and offer significant resources for implementation. The Panel also believes that it is important to be consistent across different parts of the process.

2. How They are Proposed

Current Process:

- a. Actions of Immediate Witness can be proposed at every General Assembly.
- b. Actions of Immediate Witness can only be proposed at General Assembly. Each proposal must be signed by 150 delegates from at least 25 congregations in at least five districts.
- c. No documentation of cited facts is required.

Proposed Change:

- a. No change: Actions of Immediate Witness can still be proposed at every General Assembly.
- b. The Review Panel recommends that Actions of Immediate Witness could be proposed in two ways:
 - 1) Early submission. Actions of Immediate Witness could be submitted by congregations or organizations by June 1 preceding the General Assembly. Proposals from individuals would not be eligible for early submission. Within the first week of June, the Commission on Social Witness would determine if the proposal met the stated criteria and notify the sponsors of their decision. Part of this Commission on Social Witness consideration would be consultation with UUA staff as to the grounding, fit, and opportunity of the proposed Action of Immediate Witness. This early submission would exempt said proposal from the need for petition signatures.
 - 2) Regular submission, according to the present system.
- c. Documentation of all cited facts is required for all proposals.

Rationale:

- a. Although the other recommendations of the Review Panel make it possible to alternate between “Business” and “Program” General Assemblies, we believe that it is important to still have a vehicle for immediate response to pressing issues.
- b. Advanced submissions would allow more consultation between sponsors, Commission on Social Witness, and staff, which the Review Panel believes would result in proposals that are stronger, more accurate, and more congruent with the proposed criteria. Having some sense of what might be adopted would also help the UUA staff plan for subsequent advocacy and media activities. The Panel believes that exempting early proposals from the need for petition signatures is an appropriate incentive for early submission. To ensure that all proposals have some degree of congregational/organizational support, we believe that proposals from individuals should not be exempt from the petition process. The Panel does not believe that any changes are necessary to the current petition process that happens at General Assembly.
- c. Given the little time available for verification, documentation is necessary for it to be done effectively. The Review Panel believes that this requirement appropriately sets the bar a little higher. Given the importance of the decisions being made, the Panel feels that this standard (on par with that of any academic research paper) is justified.

3. Admission to the General Assembly Agenda

Current Process: The Commission on Social Witness considers all properly-submitted Actions of Immediate Witness that meet the criteria, and selects not more than six for possible admission to the Final Agenda. The Commission may edit them and may combine two or more proposals on related subjects. After a presentation in plenary, delegates vote whether to admit

that proposed Action of Immediate Witness to the Final Agenda, with a two-thirds majority required.

Proposed Change: We recommend that the GA delegates, rather than the Commission on Social Witness, choose the six Actions of Immediate Witness that would move to the final agenda. The Commission on Social Witness would determine which met the established criteria, and place all of them on the tentative agenda. Each delegate would vote for six, and the six proposals receiving the most votes would be admitted to the Final Agenda.

Rationale: This addresses the concern of many that the Commission on Social Witness has wielded undue power in determining which proposed Actions of Immediate Witness advance to the final agenda. While the Panel concurred that four would be preferable, we honor the sentiment of the delegates on this issue, as registered in the GA 2003 survey, wherein 65% of the respondents indicated that the maximum number should be six or more.

4. How they are Amended

Current Process: For each Action of Immediate Witness admitted to the Final Agenda, there is a mini-assembly in which delegates can discuss the issue and propose amendments. Following the mini-assembly, the Commission on Social Witness meets to consider all amendments and develop a final version of the Statement which is considered at plenary. The Commission also makes a prioritized list of unincorporated amendments that could be proposed during plenary.

Proposed Change: As with Statements of Conscience, the mini-assembly process would be replaced by a working group process that moves away from large-group parliamentary procedure towards smaller, informal conversations. These small groups would lead to drafting teams that would develop final versions of the Actions of Immediate Witness. For a more detailed description of working groups, please see Proposed Change Number 10 on page 15.

Rationale: The Review Panel believes that working groups, by giving more people a meaningful voice, will result in deeper, more productive conversation and make this aspect of the Actions of Immediate Witness process significantly more compelling to delegates. We believe that it will require a significant cultural shift, but one that it is both for the best and consistent with the emphasis on small group ministry happening throughout the Association. Also, placing responsibility for drafting final versions in the hands of Commission on Social Witness alone puts enormous pressure on that group, and has led to great frustration with the lack of transparency. We believe that placing responsibility for drafting final versions in the hands of delegates chosen by delegates makes the process more open and accountable. These teams would need support from the Commission on Social Witness. For clarity and consistency, the Panel believes that the Statement of Conscience and Action of Immediate Witness processes should be as similar as possible.

5. How They Are Adopted

Current Process:

- a. In plenary, each proposed Action of Immediate Witness is considered in alphabetical order according to its title.
- b. Amendments can be proposed in order from the prioritized list after a period of time (usually 10 minutes).
- c. A two-thirds vote is required for adoption.

Proposed Change:

- a. Actions of Immediate Witness would be considered in order according to which proposal received the most votes for admission to the agenda.
- b. No amendments would be in order.
- c. A two-thirds vote would still be required for adoption.

Rationale:

- a. Because patience and attention decrease as the plenary goes on, the Review Panel believes that it is wise to consider the proposals with the most support first.
- b. As with Statements of Conscience, the Panel believes that the limited plenary time available is best spent discussing the overall merits of each proposal, and its impact on the UUA and the world. While the Panel neglected to include this question in our GA 2003 survey (an oversight on our part), anecdotal feedback suggests strong support for our recommendation. Also, the Panel believes that this recommendation will help address the problem that 77% of respondents believe that the plenary debate should “clarify how [they] can do effective work on the Actions of Immediate Witness,” but only 40% think that it does now.
- c. The Panel feels that a two-thirds vote is an appropriate standard.

6. Reviewing/Sun-setting old Actions of Immediate Witness

Current Process: There is no process for reviewing or sun-setting old Actions of Immediate Witness.

Proposed Change: The Review Panel recommends that a review process be developed.

Rationale: How long is an Action of Immediate Witness in effect? Should they expire? The Review Panel believes that these questions should be answered, but did not have time to consider a procedure for doing so.

C. PUBLIC POLICY STATEMENTS

The Review Panel proposes this definition:

A Public Policy Statement is a clear and concise summary of the UUA position on a given issue.

Currently, the UUA has four kinds of statements that inform our officers' and staff's ability to represent our views on social issues: previously passed General Resolutions (pre-1997), Statements of Conscience, Actions of Immediate Witness, and Resolutions by the Board of Trustees. Previously passed General Resolutions and Board of Trustees Resolutions were often issue-specific and are often dated in reference and context. Statements of Conscience are created by longer processes of study and action that are not responsive to fast-moving social and political developments. Actions of Immediate Witness are intended to provide a GA-based option for quick response to a single issue or political development that is too narrow or time-bound to be appropriate as a Study/Action Issue, and are by definition time-limited. All statements are available at www.uua.org/actions.

Deficiencies in the Current Situation

- To discern the UUA's position on a given issue, Association staff, UUs, or the general public must comb through all of the relevant statements. The process is time-consuming and frustrating, particularly for staff who must do so regularly.
- Very few people other than staff have the energy to review our statements in such depth, which means that very few UUs or members of the press or general public know the Association's position on any given issue.
- There is no process for reviewing or sun-setting old statements. While the staff generally considers newer statements to supercede older ones, there is no formal policy.
- There are frequently times when the Association cannot get involved in very current, important issues because the existing statements are outdated or otherwise unclear.

Review Panel Recommendations

1. Creating Public Policy Statements

Current Process: Public Policy Statements do not currently exist.

Proposed Change: The Review Panel proposes the creation of UUA Public Policy Statements (PPS). Each would begin with a few paragraphs of narrative text that would form a historical and theological context, followed by a section of concise points summarizing our existing positions (drawn from past statements) on the particular social issues that cluster under this theme. The staff would draft the initial Public Policy Statements by synthesizing existing statements on the issue, largely along the lines of existing categories, such as:

Aging	Civil Liberties	Health and Hunger
Agriculture	Corporate Responsibility	International Relations
Bisexual, Gay, Lesbian and Transgender Rights	Criminal Justice	Peace and Disarmament
Children and Youth	Draft Resistance	Racial Justice
	Economic Justice	Religious Freedom
	Energy and the Environment	Reproductive Health
	Equal Opportunity	Women's Rights

Rationale: The Review Panel believes that the problems outlined above warrant a new kind of Social Witness statement, and in particular the problem that it is difficult for Association staff, UUs, and the general public to readily discern the position of the Association on a given issue. The Review Panel believes that having a process that is clear, dynamic, and simple will be a great asset to the Association.

2. Modification and Approval

Current Process: None.

Proposed Change: The staff would propose new Public Policy Statements, or amendments to existing statements, to the Board of Trustees, with a two-thirds majority necessary for approval. All approved Statements or amendments would be reported to General Assembly. If the staff proposes a new Statement or amendment which the Board feels is not sufficiently grounded in previous General Assembly statements, the Board has two options:

- a. The Board can decline to approve the draft Statement or amendment, referring it back to staff for further work. The staff might then (1) plan to do further work and return to the Board; (2) determine that the issue is more appropriate for either the Study/Action Issue Process or the Immediate Witness process and submit it; or (3) drop it.
- b. The Board can refer the proposed Statement or amendment to the General Assembly. The staff would not have this authority. The Review Panel presumes that this would happen rarely, and only in circumstances where the Board believes that the staff proposals exceed the boundaries of previous General Assembly statements and the issue is urgent enough that referral back to staff is inappropriate. The text would not be subject to amendment, just debate and an up-or-down vote with two-thirds required for approval.

Rationale: Most Public Policy Statements or amendments will stem from positions already approved by the General Assembly. Therefore, the Review Panel proposes that approval should come from the Board of Trustees rather than sending them back to the General Assembly. The Panel believes that this recommendation appropriately recognizes the role of the Board within the Association, and avoids overwhelming the General Assembly with more business. However, the Panel believes that the Board should have the option of placing a new Public Policy Statement or amendment on the agenda of General Assembly if it sees fit. The Panel recommends eliminating amendments in plenary for the same reasons outlined above in the Study/Action Process and Actions of Immediate Witness Process: the conversation should be on the substance, not the specifics.

IV. POSSIBLE TIMETABLE FOR CONSIDERATION

- April 2004 With the Moderator's consent, this report is being sent to the UUA Board of Trustees for review at the April 2004 Board meeting. We presume that the Working Group on "Living our Faith" would take responsibility for managing the Board's ongoing process of consideration. The Review Panel recommends that the Board seek feedback on the report (in addition to the GA hearing) before acting on its recommendations. Also, the Review Panel hopes the Board will review this feedback for themes related to the meaning and purpose of the General Assembly.
- GA 2004 The Board of Trustees will hold a hearing on the report, which is already scheduled.
- 2004 –2005 Depending on the process and timeline for feedback, the Board would consider the formal recommendations in either October 2004 or January 2005 (or perhaps both). At some point the UUA's legal counsel would need to prepare language for the necessary by-law and rule changes. Since this is the third major revision of the social witness process since 1986, the Review Panel encourages the Board, legal counsel, and staff to minimize the by-law changes that would be made necessary by further changes to the process by making the by-law language simple and flexible. The procedural details of the process should be articulated elsewhere.
- April 2005 This meeting is the last opportunity for the Board to place recommended changes on the agenda for General Assembly 2005.
- GA 2005 General Assembly would consider any proposed changes to the social witness process.
- GA 2006 If changes are approved, the new processes would first be used in the 05-06 year, including the Congregational Poll in the spring of 2006, and at the 2006 General Assembly.

SIDE-BY-SIDE OF THE CURRENT AND PROPOSED STUDY/ACTION PROCESS (INCLUDING STATEMENTS OF CONSCIENCE)

	CURRENT	PROPOSED
	<p>Proposed Study/Action Issues can be submitted by Congregations and Districts.</p> <p>CSW places up to 10 on the Congregational Directives for GA Action Survey.</p> <p>Congregations vote for five. The top five are considered at General Assembly.</p>	<p>Proposal Study/Action Issues can be submitted by congregations, districts, UUA associate member organizations, sponsored organizations, affiliate organizations, and UUA staff.</p> <p>CSW places up to 7 on the renamed Congregational Poll.</p> <p>Congregations vote for three. A quorum of 25% of congregations must participate for the poll to be valid. The top three are considered at General Assembly.</p>
GA 1	Delegates in plenary select one.	Delegates in plenary select one, with additional emphasis placed on the criteria of grounding, fit, and opportunity.
	<p>Immediately following General Assembly, a preliminary Study/Action Issue Resource Guide is mailed to all congregations. A final Study/Action Resource Guide is mailed to all congregations by the First Friday in October.</p> <p>Comments on the Study/Action Issue are due March 1.</p>	<p>Immediately following General Assembly, a preliminary Study/Action Issue Resource Guide would be made available (though not necessarily mailed) to all congregations. A final Study/Action Issue Resource Guide would still be mailed to all congregations in the fall.</p> <p>The CSW starts to gather the Study/Action Issue Resource Panel.</p> <p>Comments on the Study/Action Issue are due March 1.</p>
GA 2	The CSW holds a hearing on the issue to receive further comments.	Various programs, workshops, and hearings are held on the issue, put on by CSW, expert panel, and staff. CSW and expert panel meet to start drafting report and Statement of Conscience.
	<p>CSW required to mail draft of SOC to all congregations by First Friday in October.</p> <p>Comments on draft are due March 1. CSW redrafts and places on agenda for General Assembly.</p>	<p>Draft SOC made available to all congregations.</p> <p>Comments on draft are due March 1. With input from the Resource Panel, the CSW redrafts and places on congregational poll.</p> <p>A 2/3rds vote by a quorum of congregations (25%) is necessary for the SOC to be voted on at GA. Failure refers the issue back to the CSW.</p>
GA 3	A Mini-Assembly is held on the draft SOC. All amendments must be proposed in the mini. Afterward, the CSW meets to redraft the SOC and prioritize unincorporated amendments. On the plenary floor, amendments are in order after 10 minutes, and can only be made in prioritized order. An SOC must be approved by a 2/3rds margin. It can also be referred for one additional year of study by a simple majority.	Programs and workshops are held on the issue. Working groups are held on the draft. Representatives from the working groups are selected to develop a final version of the SOC. If the SOC passed the congregational poll, than it would be considered on the plenary floor without possibility of amendment, with a 2/3rds vote necessary for approval. If the vote is less than 2/3rds but more than a simple majority, it can be referred for one additional year of study. If it's less than a simple majority, it simply fails.
	The final version is made available to congregations.	The final version is made available to congregations.
GA 4		<p>An implementation guide is made available to all congregations in the fall.</p> <p>The CSW, expert panel, and staff plan programs on implementation, including the sharing of best practices and skills building. Also known as the "So What" GA.</p>

Key: CSW=Commission on Social Witness
SOC=Statement of Conscience

SIDE-BY-SIDE OF THE CURRENT AND PROPOSED ACTIONS OF IMMEDIATE WITNESS PROCESS

CURRENT	PROPOSED
<p>Criteria</p> <ul style="list-style-type: none"> • Immediate relevance • Clearly defined and focused, addressing a single, specific topic or circumstance • Too narrow in focus to merit the study/action process • Factual documentation not required. <p>Who can propose: Any member of a Unitarian Universalist congregation who is present at GA</p> <p>Submission: By 5:00 PM on Saturday to the GA Office. Along with the text, sponsors must submit petitions with at least 150 signatures of delegates from at least 25 different congregations in at least five different districts.</p>	<p>Criteria</p> <ul style="list-style-type: none"> • Current criteria (timeliness, specificity, narrowness of focus) expanded to include grounding, fit, and opportunity. • Factual documentation required. <p>Who can propose: In addition to individuals, Action of Immediate Witness could be submitted by congregations, districts, UUA associate members, sponsored organizations, independent affiliates, and UUA staff.</p> <p>Priority Submission Deadline: June 1st. Actions of Immediate Witness could be submitted by congregations or organizations (not individuals) by June 1 preceding the General Assembly. This early submission would exempt said proposal from the need for petition signatures, pending review by the Commission on Social Witness for consistency with other criteria and for factual accuracy.</p> <p>Regular Submission: By 5:00 PM on Saturday to the GA Office. Along with the text, sponsors must submit petitions with at least 150 signatures of delegates from at least 25 different congregations in at least five different districts.</p>
<p>How an Action of Immediate Witness Gets on the GA agenda</p> <p>The Commission on Social Witness selects up to six proposals that meet the criteria for possible admission to the GA Final Agenda. The Commission may edit them and may combine two or more proposed Actions of Immediate Witness on related subjects. The delegates vote to admit each proposal to the agenda, with a two-thirds majority required for admission.</p>	<p>How an Action of Immediate Witness Gets on the GA agenda</p> <p>The Commission determines which submissions meet the criteria, and all that do will be put before the GA plenary. Each delegate will vote for six, and the six proposals receiving the most votes would be admitted to the Final Agenda.</p>
<p>Further Discussion and Amending</p> <p>For each Action of Immediate Witness admitted to the Final Agenda, there is a Mini-Assembly, where delegates can propose amendments to the proposed text.</p> <p>The Commission on Social Witness then meets to incorporate the proposed amendments and prioritize any unincorporated ones for possible adoption by the delegates in the Monday plenary. These amended proposals are available to delegates to read before Monday's plenary.</p>	<p>Further Discussion and Amending</p> <p>As with the Study/Action Process, the amendment work on the final drafts would happen in GA working groups replacing our current mini-assemblies. Meeting and working groups are held; representatives from the working groups are selected to develop a final version. The Commission on Social Witness would no longer edit the texts of Actions of Immediate Witness.</p>
<p>Voting</p> <p>Action of Immediate Witness are debated, with amendments being in order after a certain time and only in prioritized order. A two-thirds vote is required for adoption.</p>	<p>Voting</p> <p>Actions of Immediate Witness are debated, based on the final version created by the drafting team, without possibility of amendment. A two-thirds vote is required for adoption.</p>

Social Witness Review Panel Survey Summaries

From surveys taken of delegates at General Assembly 2003 in Boston, MA

General Information

I. ENGAGEMENT

- A. How would you rank your congregation's current participation in the social witness process, including the proposal of Study/Action Issues, voting in the Congregational Directives Survey, submitting comments, and discussing how your GA delegates might vote at GA? (n=1579)

5 (very high) 4%
 4 9%
 3 19%
 2 43%
 1 (completely inactive) 24%
 N/A -%

If your congregation has participated, please respond to the following two questions. If your congregation has not participated, please skip to Item D.

- B. To what extent has your participation in the social witness process affected your local programs and agenda? (n=1080)

5 (considerably) 5%
 4 12%
 3 24%
 2 40%
 1 (not at all) 16%
 N/A 2%

- C. Please rate your congregation's quality of experience with the process. (n=1034)

5 (very positive) 6%
 4 15%
 3 41%
 2 27%
 1 (very negative) 2%
 N/A 9%

- D. If your congregation has not participated, what are the key factors? Please check all that you consider very significant. (n=1362)

- We don't know about it (456) . 33%
- We're too busy with local concerns (522) 38%
- We don't care about denominational business (238) 17%
- The process is too complicated (130) 10%
- We don't think the UUA should make statements about social issues (16) 1%

II. CLARITY of PURPOSE

Please rate the following potential outcomes of our Social Witness process on their importance to you.

- A. To provide congregational input to UUA social justice staff about setting priorities and developing resources (n=1586)

5 (very important) 51%
 4 34%
 3 11%
 2 3%
 1 (not important) 9%
 N/A -%

- B. To provide congregations nationwide with vehicles to collaborate and rally around common issues (n=1590)

5 (very important) 67%
 4 22%
 3 7%
 2 2%
 1 (not important) 8%
 N/A -%

- C. To produce internal statements, giving our faith community a deeper sense of identity and history (n=1567)

5 (very important) 46%
 4 35%
 3 13%
 2 3%
 1 (not important) -%
 N/A -%

- D. To produce statements for the media, elected officials, and the general public that articulate our values to the wider world (n=1562)

5 (very important) 46%
 4 32%
 3 16%
 2 5%
 1 (not important) 8%
 N/A -%

Study/Action Issues (SAIs)

This process stipulates that only congregations and districts can propose SAIs. By December 15 each year, the five-member Commission on Social Witness typically receives about 10-15 proposals, from which it selects up to ten to place on the Congregational Directives Survey distributed to congregations in early March. Congregations return this survey by April 15. Results indicate which five proposals will be considered at that year's General Assembly.

I. UNDERSTANDING of PROCESS

A. How well do you understand the SAI process that unfolds at General Assembly? (n=1577)

5 (*completely clear*) 19%
 4 36%
 3 28%
 2 14%
 1 (*completely confused*) 3%
 N/A -%

B. How accessible do you find the process? (n=1562)

5 (*totally accessible*) 12%
 4 34%
 3 32%
 2 18%
 1 (*totally inaccessible*) 3%
 N/A 1%

II. HOW THEY GET TO GA

Please rate the extent to which you believe the following changes would make the process more effective.

A. An increased number of submissions from congregations and districts (n=1520)

5 (*considerably*) 10%
 4 19%
 3 22%
 2 27%
 1 (*not at all*) 19%
 N/A 3%

B. Having more than ten issues from which to choose on the Congregational Directives Survey (n=1530)

5 (*considerably*) 2%
 4 4%
 3 13%
 2 33%
 1 (*not at all*) 45%
 N/A 2%

C. Allowing UUA Departments (such as Advocacy & Witness, Identity-Based Ministries) to propose SAIs (n=1530)

5 (*considerably*) 12%
 4 28%
 3 25%
 2 15%
 1 (*not at all*) 17%
 N/A 3%

D. If you don't think the proposal process is representative of our larger body of faith, please note which entities, in addition to congregations and districts, should be allowed to propose SAIs (check all that apply): (n=1001)

- UUA Departments: Advocacy & Witness, Identity-Based Ministries, and others (635) 63%
- UUA Sponsored Organizations: YRUU (Young Religious Unitarian Universalists) and C*UUYAN (Continental Unitarian Universalist Young Adult Network) (786).... 78%
- UUA Associate Member Organizations: UU Service Committee, UU United Nations Office, and UU Women's Federation (721) 72%
- Independent Affiliate Organizations, such as Unitarian Universalists for a Just Economic Community; Unitarian Universalists for Drug Policy Reform; the UU Seventh Principle Project; and many others (585) 58%
- UUA Board of Trustees (384) 38%

III. THE DEBATE AT GA

After open debate at a plenary session, delegates now select one of the up to five SAIs for study and action over the next two years.

A. To what extent does the plenary debate on SAI selection offer you a better sense of UU identity and history? (n=1526)

5 (*considerably*) 33%
 4 31%
 3 22%
 2 11%
 1 (*not at all*) 3%
 N/A -%

Study/Action Issues (SAIs) Continued

B. To what extent should the plenary debate do this? (n=1518)

5 (<i>considerably</i>)	46%
4	34%
3	13%
2	4%
1 (<i>not at all</i>)	1%
N/A	1%

C. To what extent does the plenary debate on SAI selection clarify how you and your congregation can do effective work on the issue selected? (n=1512)

5 (<i>considerably</i>)	12%
4	21%
3	28%
2	27%
1 (<i>not at all</i>)	12%
N/A	1%

D. To what extent should the plenary debate do this? (n=1497)

5 (<i>considerably</i>)	37%
4	32%
3	17%
2	8%
1 (<i>not at all</i>)	4%
N/A	1%

IV. FREQUENCY of PROPOSALS

The current Study/Action process permits one new issue to be selected each year. After one year of study and action, during which time congregations and districts are encouraged to submit comments to the Commission on Social Witness, the Commission prepares a draft Statement of Conscience. In the second year of study and action, comments are encouraged on the draft itself. The CSW incorporates these comments into a final draft that it proposes to the General Assembly. If approved by a 2/3rds vote, the statement becomes UUA policy. A Statement of Conscience could also be rejected or tabled for another year of study and action. This replaces the General Resolutions process (pre-1996), which allowed three statements to be approved each year. The change was made to provide a longer, more focused process that would allow greater depth of study and a stronger foundation for action. Discussion continues regarding the pros and cons of the frequency with which SAIs are proposed

For each of the following items, please check the single option that indicates your opinion.

A. In terms of frequency with which a new Study/Action Issue is chosen, do you favor: (n=1486)

3 SAIs per year	17%
1 SAI per year (<i>current</i>)	67%
1 every 2-3 years	14%
1 every 4-6 years	-%

B. In terms of length for study and action, before an SAI moves into a Statement of Conscience, do you favor: (n=1480)

1 year	21%
2 years (<i>current</i>)	71%
3-4 years	7%
5-6 years	-%

Statements of Conscience (SOC)

The Statement of Conscience replaced the resolution, which had been shorter in length and formal in tone. An SOC emerges from a two-year process of a study and action. It reflects commentary submitted by congregations and districts to the Commission on Social Witness (CSW), which holds a GA mini-assembly to further inform delegates and to receive proposed amendments and then presents the draft SOC for plenary debate and voting. After the plenary debate and the incorporation of adopted amendments, an SOC is usually approved. Adopted SOCs shape our faith identity, empower the Washington Office on Advocacy to lobby our positions in pending legislation, and serve congregations and other UU groups in local efforts.

I. UNDERSTANDING of PROCESS

A. How well do you understand the Statement of Conscience process that unfolds at General Assembly? (n=1089)

5 (<i>completely clear</i>)	18%
4	38%
3	26%
2	14%
1 (<i>completely confused</i>)	4%
N/A	-%

B. How accessible do you find the process? (n=1085)

5 (<i>totally accessible</i>)	11%
4	32%
3	33%
2	20%
1 (<i>totally inaccessible</i>)	2%
N/A	1%

Statements of Conscience (SOC) Continued

II. CONGREGATIONAL INPUT

Currently, congregations and districts are invited to submit written general comments on a Study/Action Issue by the March 1 after initial adoption of the SAI. They are invited to offer their oral commentary at a hearing at the subsequent GA. The CSW draws on these comments to prepare a draft Statement of Conscience. During the second year, congregations and districts are invited to provide specific written comments on the draft SOC by the following March 1. The CSW draws upon this commentary to prepare a second draft SOC. At the subsequent GA, delegates can propose amendments to this draft.

- A. Do you believe that this process allows sufficient opportunity for congregational and district input? (n=1065)

5 (yes)	32%
4	28%
3	22%
2	13%
1 (not at all)	2%
N/A	2%

III. GA PROCESS

Prior to the final plenary debate on the SOC, a mini-assembly is held in which delegates are invited to discuss the issue in-depth and propose amendments. Amendments not proposed during a mini-assembly cannot be offered in plenary.

- A. Have you ever attended a mini-assembly on the SOC? (n=1084)

Yes	24%
No	76%

- B. If Yes, did you feel that it was a productive forum for deliberations? (n=325)

5 (yes)	27%
4	29%
3	19%
2	8%
1 (not at all)	2%
N/A	16%

- C. Should the mini-assembly preceding plenary debate of the draft SOC be: (n=938)

- A time only to further inform delegates about the content of the SOC 14%
- A time to further inform delegates of SOC content AND to receive amendments 61%
- A time only to receive amendments delegates should know the content 22%
- Mini-assemblies are a waste of time 2%

- D. To what extent does the plenary debate on the SOC offer you a better sense of UU identity and history? (n=1047)

5 (considerably)	19%
4	32%
3	26%
2	17%
1 (not at all)	4%
N/A	2%

- E. To what extent should the plenary debate do this? (n=1042)

5 (considerably)	36%
4	37%
3	18%
2	6%
1 (not at all)	2%
N/A	1%

- F. To what extent does the plenary debate on the SOC clarify how you and your congregation can do effective work on implementation? (n=1045)

5 (considerably)	6%
4	18%
3	28%
2	33%
1 (not at all)	13%
N/A	2%

- G. To what extent should the plenary debate do this? (n=1040)

5 (considerably)	31%
4	35%
3	18%
2	10%
1 (not at all)	4%
N/A	1%

Statements of Conscience (SOC) Continued

H. With regard to amendments, please check one of the following: (n=985)

- No Amendments should be considered in plenary; that should be settled elsewhere (175). 18%
- Only amendment proposed prior to GA should be considered (eliminating mini-assembly) (106) 11%
- Only amendments proposed in a mini-assembly should be allowed in plenary (current) (518) 52%
- Any amendment should be allowed in plenary (186) 19%

IV. IMPLEMENTATION

I. That you know of, has your congregation ever done work to implement a State of Conscience? (n=1002)

Yes	35%
No	64%

Actions of Immediate Witness

An Action of Immediate Witness permits the General Assembly to address issues that are too time-sensitive and singular in focus for a Study/Action Issue. To be considered on the GA agenda, a proposed AIW must be submitted to the Commission on Social Witness by 5:00 p.m. Saturday, with signatures from at least 150 delegates representing at least 25 congregation and 5 districts. The CSW selects up to six of the proposed AIWs according to the criteria of immediacy, focus, and receptivity to being addressed by our congregations and affiliate organizations. Mini-assemblies are held on each of the six, during which time amendments are received. AIWs are then debated on the plenary floor, with up to 30 minutes allowed for each. Passage requires a two-thirds vote. Up to six AIWs may be passed at each GA.

Unlike the Statement of Conscience, an AIW does not carry the authority of UUA policy but represents the will of the specific GA delegate body that adopts it. Adopted AIWs are used by congregations in local efforts and empower the Washington Office of Advocacy to speak with the authority of a particular GA.

The following questions address the logistics and quality of content and the process of considering proposed AIWs at GA. For each of the following questions,

please check the response or circle the number that best describes your opinion.

I. UNDERSTANDING of PROCESS

A. How well do you understand the Action of Immediate Witness Process that unfolds at General Assembly? (n=834)

5 (<i>completely clear</i>)	27%
4	47%
3	18%
2	7%
1 (<i>completely confused</i>)	1%
N/A	-%

B. How accessible do you find the process? (n=838)

5 (<i>totally accessible</i>)	20%
4	44%
3	24%
2	9%
1 (<i>totally inaccessible</i>)	1%
N/A	1%

II. QUALITY of CONTENT

A. What should the maximum number of Actions of Immediate Witness be that might be passed at any single GA? (n=825)

Two	6%
Four	29%
Six (current policy)	59%
More than six	6%

B. To what extent does the current AIW process (the initial presentations on the plenary floor, the mini-assemblies, the final debate) allow you to trust that the content of any single AIW contains accurate information? (n=827)

5 (<i>considerably</i>)	13%
4	30%
3	33%
2	20%
1 (<i>not at all</i>)	3%
N/A	1%

C. To what extent would you support a requirement that AIWs be submitted prior to GA – June 1, for example – to allow for fact checking? (n=826)

5 (<i>strongly supports</i>)	39%
4	23%
3	15%
2	13%
1 (<i>not at all</i>)	11%
N/A	-%

Actions of Immediate Witness Continued

III. GA PROCESS

Prior to the final plenary debate on the AIWs, mini-assemblies are held in which delegates are invited to discuss the issue in-depth and propose amendments. Amendments not proposed during a mini-assembly cannot be offered in plenary.

A. Have you ever attended a mini-assembly on an AIW? (n=826)

Yes	27%
No	73%

B. If Yes, did you feel that it was a productive forum for deliberation? (n=250)

5 (yes)	32%
4	27%
3	19%
2	9%
1 (not at all)	2%
N/A	10%

C. Should the mini-assembly preceding plenary debate of the AIWs be: (n=739)

- A time only to further inform delegates about the content of the AIW 8%
- A time to further inform delegates of AIW content AND to receive amendments 79%
- A time only to receive amendments 11%
- Mini-assemblies are a waste of time 1%

D. To what extent does the plenary debate on AIWs offer you a better sense of UU identity and history? (n=785)

5 (considerably)	21%
4	37%
3	22%
2	14%
1 (not at all)	4%
N/A	1%

E. To what extent should the plenary debate do this? (n=803)

5 (considerably)	35%
4	37%
3	18%
2	7%
1 (not at all)	2%
N/A	1%

F. To what extent does the plenary debate on AIWs clarify how you and your congregation can do effective work on the AIWs that are approved? (n=805)

5 (considerably)	9%
4	31%
3	30%
2	22%
1 (not at all)	7%
N/A	1%

G. To what extent should the plenary debate do this? (n=778)

5 (considerably)	40%
4	37%
3	13%
2	5%
1 (not at all)	3%
N/A	1%