

## **Shared Narrative on the Non-Congregational Sources of Authority and Accountability**

### **What is a Source of Authority and Accountability?**

The Unitarian Universalist Association (UUA) Board of Trustees governs on behalf of the Sources of Authority and Accountability. Policy 3.0 states that “The purpose of the Board, on behalf of the Sources of Authority and Accountability, is to ensure that the Unitarian Universalist Association (a) achieves appropriate results for appropriate persons at an appropriate cost, and (b) avoids unacceptable actions and situations.”

This means that the board needs to stay in close communication and connection with these Sources of Authority and Accountability. Policy 3.2.1 details the board responsibility to:

3.2.1 Create and maintain linkage between the Board and the Sources of Authority and Accountability defined in Policy 3.0.

- a. Linkage shall mean
  1. Formal, intentional dialogue with the Sources of Authority and Accountability for the purpose of understanding the Sources’ values and the benefits the Association should produce
  2. Connections with the Sources of Authority and Accountability that ensure the board governs accountably on their behalf.
- b. No task shall have a higher priority.
- c. In linking with any particular Source, the Board will listen to multiple voices.
- d. The Board will collaborate with communities and organizations outside the Board in identifying the voices invited to speak on behalf of these Sources.
- e. The Board will report on its linkage activities with these Sources, identifying not only the methodology but also the values discerned, and the impact of those values on Board actions.

Policy Governance® insists that for most organizations a board should identify its moral ownership (Sources of Authority and Accountability) beyond its legal owners. In going from a clear acknowledgement that the board governs on behalf of the Sources of Authority and Accountability to defining or naming them a board would ask itself questions such as:

- Whose are we?
- Whose voices need to be heard as the board discerns and articulates our Association’s mission, and ends?
- Who should influence what our future will hold?
- Who cares about the future of our Association and the differences it’s called to make in the world, beyond the benefits they receive from it?
- Who deserves to hear about the Association’s progress in order to validate the effects of its work?

## **How does the UUA board define its Sources of Authority and Accountability?**

According to Policy 3.0:

Our Sources of Authority and Accountability are defined as:

- Our member congregations
- Current and future generations of Unitarian Universalists
- The heritage, traditions, and ideals of Unitarian Universalism
- The vision of Beloved Community
- The Spirit of life, love, and the holy

## **About this Shared Narrative:**

Recently, the UUA Board engaged Unity Consulting to assist a team of trustees in helping to better define its non-congregational Sources of Accountability and Authority and to help the Board develop a linkage practice to faithfully connect with and hear those Sources. A first step in this project was to describe the Board's shared narrative for how these Sources came to be named and the Board's current understanding of the meaning and relevance of these non-congregational Sources. During the latter half of January, 2012 eight current and 16 former trustees (those present at the time the Sources were named) either participated in teleconferences or submitted reflections in writing on this topic. The remainder of this document summarizes the shared narrative derived from these conversations and reflections.

## **What's the history of naming these as Sources?**

The UUA Board named its five Sources of Authority and Accountability as part of its transition to Policy Governance. They drafted the original set at their October 2008 board meeting, and then adopted a slightly revised version at their January 2009 board meeting. Through their reflections on stakeholders and how they differ from Sources of Authority and Accountability in their governance role, through reflection on what was important to them and what motivated their deliberations, the board came to understand that they were accountable to values as well as our member congregations. More than a checklist of identity groups, the Sources and the religious, poetic language used to express them, were intended to reflect the spirit, ideals, and dreams of and for Unitarian Universalism.

## **What's our current understanding of the meaning and relevance of these Sources?**

Overall, trustees say that the relevance of the non-congregational Sources has deepened for them. Most say that the Sources remind them of how the UUA, as an organization, is more than our congregations, and is accountable to something larger, and that the non-congregational Sources name that accountability effectively, in that they:

- Connect the board to values that need to inform its decision-making.
- Enable trustees to make potentially unpopular decisions that will be in the best interest of the Sources as a whole in the long run.
- Provide balance and perspective the board needs to make effective decisions.

A rich diversity of meanings of the Sources has developed as well:

- **Current and future generations of Unitarian Universalists**  
Trustees talked about how the board makes decisions that affect future Unitarian Universalists; that they are stewards of an institution for the future. Some trustees remember this being identified as a Source specifically to call to mind our youth and young adults; others were drawn to the way it called to mind the concept of being accountable to seven generations; for others this Source called to mind all those who are currently outside our faith but might yet come to Unitarian Universalism.
- **The heritage, traditions, and ideals of Unitarian Universalism**  
For some, this Source called to mind how we are uniquely Unitarian Universalist and made sure that our unique heritage was honored in the board's work. Others were reminded by this Source that Unitarian Universalism is an evolutionary faith, that we're standing in the stream of history that moves forward. Another said that we remain relevant to the extent we learn lessons from the past including those which make us uncomfortable.
- **The vision of Beloved Community**  
Many saw this Source as the articulation of our aspiration for what we and the world could be, an articulation of a direction we want to move in the world and of heaven on Earth. Some saw this Source as an articulation of values such as justice, compassion and equity. Some asked the question "Beloved Community for whom?" in thinking about this Source.
- **The Spirit of life, love, and the holy**  
Many trustees saw this as the board's attempt to define a connection to something larger than ourselves, beyond ourselves, or to God, that could be articulated and experienced in many different ways.

A minority viewpoint, but strongly held by the people that expressed it, is that the non-congregational Sources muddy the clarity that Policy Governance® was supposed to bring to governance. On at least one call this discomfort was centered in not knowing how to link with these non-congregational Sources or in having a more restricted definition of the practice of linkage. In naming accountability to groups with whom it's difficult to imagine linking directly (particularly "The vision of Beloved Community" and "The Spirit of life, love, and the holy"), these people felt the board made it more difficult to be effectively accountable or to derive effective authority for its actions. One trustee also said that connection to these other Sources should come through the connection to our member congregations. The challenge this viewpoint identified in linkage reinforced the importance of this process to develop a theoretically and theologically grounded linkage practice to the non-congregational Sources.