

**For the Board's Review and Affirmation  
Draft Operational Interpretations of  
Sources of Authority & Accountability**

As you know, the Core Team (Linkage Working Group plus Clyde Grubbs) has been working to develop operational definitions of our five Sources of Authority and Accountability. The Core Team has been working with Unity Consulting for the past 9 months per the contract we signed in November of last year, with the following project deliverables:

1. A theoretical, theological, and historical framework for linkage with non-congregational Sources that:
  - Identifies why the non-congregational Sources are named as sources
  - Identifies the theological underpinnings for these Sources.
  - Clarifies how these Sources “speak” as sources (through living people? through other means than living people? How do we “hear” both? What unique perspectives does each Source offer?)
2. A regular practice of connecting with non-congregational Sources that:
  - Takes trustees from testing the practice to having it be a regular, reliable part of their trustee work.
  - Includes a process for orienting new trustees to the practice.

We're providing you with a document that summarizes our work on the first deliverable: Draft Operational Definitions of the Sources of Authority and Accountability, including the board policies they respond to and a matrix of key concepts we worked to incorporate into these Operational Definitions. In October, we'll be asking for your affirmation that these Operational Definitions are good enough to take us to the next phase of our project—testing these definitions and our developing linkage practice guidelines with linkage around ENDS after the October meeting.

**Your Homework for the October Meeting**

Think about the board's recent explorations of the Doctrine of Discovery or the definition of a congregation. Pick one of these topics and imagine using these operational definitions to guide you in linkage around that topic with our Sources.

1. How do these operational definitions influence your thinking about linkage with our Sources around this topic?
2. Are these Operational Definitions helpful and appropriate? Do they aim our understanding of these Sources and our linkage with them in the right direction?
3. What big picture concepts, if any, are missing from these definitions?

In October, we'll ask for your feedback on these three questions. Please focus on big picture concepts and ideas rather than word-smithing in your responses. We're not aiming to make these perfect—we're aiming to make them good enough, effective enough to move on to testing them. We expect they'll continue to change and evolve after the testing phase and beyond. We look forward to your responses.

In faith,

The Core Team  
Catherine Cullen  
Clyde Grubbs  
Linda Laskowski  
Pat Manley  
Caleb Raible-Clark

## **Draft Operational Interpretations of Sources of Authority & Accountability**

### **Our Member Congregations**

As the legal owners of our Association of Congregations, our Member Congregations are the board's most direct source of authority and accountability. Through our UUA bylaws the board's relationship with member congregations is not just legal and fiduciary, but also covenantal so that our UU religious heritage underpins this relationship. We formally link to Member Congregations through their elected and called leaders including their delegates to General Assembly. In this way, we honor our congregations' democratic process, connecting to the leaders elected and called to represent their congregations. Member Congregations are currently the primary instruments of the Association's mission, offering a comprehensive range of perspectives to their role as owner. In linking with this Source, we intentionally hear those perspectives through such methodologies as surveys, focus groups, issues forums, interviews, and through their resolutions and debates in GA plenary sessions and mini-assemblies.

### **Current and future generations of Unitarian Universalists**

Reminding us of our obligation to all Unitarian Universalists, and calling us to the future of Unitarian Universalism, current and future generations of Unitarian Universalists complements and expands the authority and accountability we receive from our member congregations. At any time "current generations" of Unitarian Universalists includes 4-5 actual generations from children to seniors. Nonetheless, the board's most significant focus for this source of authority and accountability are youth and young adults because they are the generation most likely to:

- Be at the forefront of cultural movement and technological change.
- Offer, by their less inhibited, group-centered, idealistic, exploring approach to life, vivid expressions of UU ideals and the quality of our beloved community.
- Represent, by virtue of their procreative power, how our heritage might be lived in next generations.

The Board will intentionally link with youth and young adults through caucuses or other formal gatherings at GA, regional or district events, and/or campus organizations, as well as through social media.

Former or lapsed Unitarian Universalists are also part of this Source. They represent our "wandering children" who hold untapped wisdom and potential insights from their experiences into beloved community. We will link with them through surveys, both one-off and longitudinal, and through focus groups.

### **The heritage, traditions and ideals of Unitarian Universalism**

This Source reminds us that ours is a living tradition in which revelation is not sealed, grounds us in what it has meant to be a Unitarian Universalist in both its strengths and failings, and helps us to evolve that understanding for the future. We link to this Source through our study of:

- The collective voice of our movement and its history as recorded in the minutes, the resolutions and the actions of the UUA Board, the Administration, the board and administration of the organizations that preceded the UUA, and the General Assembly.
- The writings of our historical figures, ministers, denominational leaders, and UU historians
- The works published by Beacon Press, particularly those that take controversial positions in the public square that live up to our ideals.
- Our hymnals.
- Our bylaws.

- The actions of those who are trying to live up to our heritage, traditions, and ideals.

In linking with this Source, we will select elements from among these voices that are most instructive and articulate how our faith's heritage, traditions and ideals speak to the question at hand.

### **The vision of Beloved Community**

This Source calls us back to our covenant and principles, our best selves, and our community and forward into an aspirational vision of how we would like to be together. The voices of the vision of Beloved Community include justice-seekers, justice-makers, and the oppressed speaking to us through stories about their lives, their work, and their successes and failures in building and living Beloved Community. We hear these stories:

- Directly in our visits with justice-seekers, justice-makers and the oppressed.
- In sermons and sacred texts from all faith traditions that remind us of love, connectedness, relationship and community.
- Through the arts including literature, poetry, theater, music, and stand-up comedy.

In linking with this Source, we will systematically and intentionally choose a variety of ways to hear these stories to make sure this Source informs our board's work.

### **The Spirit of life, love and the holy**

The Spirit of Life, Love and the Holy is the most personal of the Sources and also the most universal and accessible. It is the Source that links the Board to what gives life – to what is greater than us – to what is ultimate. This Source speaks to us through direct experience, spiritual texts and teachings of world religions, science and reason, the arts and literature, and in acts of reconciliation, wholeness, and love. We will link to this Source both as individuals through applying our individual spiritual practice in contemplation of the question at hand, and collectively as a Board in group meditative reflections, story-telling, experiences of witness, worship, and through other means.

**Sections of UUA Board policy relevant to the Linkage Project and the draft interpretations of Sources**

**3.0 Global Governance Commitment**

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.

The Board will inspire, direct and hold accountable the administration and itself through the careful establishment of broad written policies reflecting Unitarian Universalist values and perspectives.

Our Sources of Authority and Accountability are defined as:

1. Our member congregations
2. Current and future generations of Unitarian Universalists
3. The heritage, traditions, and ideals of Unitarian Universalism
4. The vision of Beloved Community
5. The Spirit of life, love, and the holy

**3.2 Board Job Description**

As informed and elected leaders of our Association of member congregations, the UUA [Unitarian Universalist Association] Board of Trustees assures organizational performance by creating, communicating, and monitoring organizational systems and performance, in accord with established Board policy.

Accordingly, the Board has responsibility to:

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.

### **Matrix Showing Key Concepts Worked Into the Operational Definitions**

To develop the key concepts we wanted to incorporate into the draft interpretations, we first had conversations around five questions about each of the five Sources:

1. What are the voices for this Source?
2. How do they speak?
3. What are their perspectives?
4. What type of power do they have?
5. What are the theological and theoretical underpinnings of this Source?

The matrix on the next five pages shows each question on a separate page and the key concepts we developed to include in the interpretations for each Source. We offer it as background material to the interpretations themselves.

	<b>Congregations</b>	<b>Current and Future Generations of UUs</b>	<b>Heritage, traditions and ideals of UUism</b>	<b>Vision of Beloved Community</b>	<b>Spirit of Life, love, and the holy</b>
<b>Voices</b>	<ul style="list-style-type: none"> <li>• Called and elected leaders</li> <li>• General Assembly delegates</li> <li>• Congregation-designated spokespersons</li> </ul>	<ul style="list-style-type: none"> <li>• Youth</li> <li>• Young adults</li> <li>• “Wandering Children”</li> </ul>	<ul style="list-style-type: none"> <li>• Historical figures in Unitarian Universalism</li> <li>• Ministers, denominational leaders, Unitarian Universalist historians and theologians who interpret and evolve our understanding of our heritage, traditions and ideals.</li> </ul>	<ul style="list-style-type: none"> <li>• Voices that call us to our better selves</li> <li>• Voices of compassion and empathy</li> <li>• Martin Luther King Jr. and other prophetic voices global vision of justice and equality, a society based on community.</li> <li>• Voices of the oppressed</li> <li>• Justice-seekers</li> <li>• Justice-makers</li> </ul>	<ul style="list-style-type: none"> <li>• Our Unitarian Universalist Principles and Sources</li> <li>• Our own voices when we are at our very best</li> </ul>

	Congregations	Current and Future Generations of UUs	Heritage, traditions and ideals of UUism	Vision of Beloved Community	Spirit of Life, love, and the holy
<b>How they speak</b>	<ul style="list-style-type: none"> <li>• one-on-one conversations</li> <li>• surveys</li> <li>• interviews</li> <li>• focus groups -- this approach puts loud voices into larger perspective</li> <li>• General Assembly votes</li> </ul>	<p><b>Youth --</b> congregational and district level through cons, youth caucuses and other programs at GA, district and regional level in conversations with district leaders through social media</p> <p><b>Young Adults --</b> through CAYAN, new umbrella organization, in campus groups, with Young Adult observer of the Board and through UUA staff connections, through social media</p> <p><b>“Wandering Children”</b> -- through surveys, focus groups, and one on one conversations; from activities that have trustees consider actions as if they were already in future</p>	<ul style="list-style-type: none"> <li>• The writings of our historical figures</li> <li>• The writings and speaking of the ministers, denominational leaders, and UU historians who interpret and evolve our understanding of our heritage, tradition and ideals.</li> <li>• The works published by Beacon Press, particularly those that take controversial positions in the public square that live up to our ideals.</li> <li>• Our hymnal.</li> <li>• Our bylaws.</li> <li>• The actions of those who are trying to live up to our heritage, traditions, and ideals.</li> </ul>	<ul style="list-style-type: none"> <li>• Stories from justice-seekers, justice-makers and the oppressed about their lives and their work, of their and our successes and failures in building and living beloved community. We can find these stories in the arts (literature, poetry, theater, music, stand-up comedy), in sermons and sacred texts, anywhere someone is trying to highlight injustice and call us to our better selves.</li> <li>• Our principles</li> </ul>	<ul style="list-style-type: none"> <li>• Texts and teachings of the world religions.</li> <li>• Direct experience and individual intuition of wonder, mystery, gratitude, and the unity of creation, especially as revealed through meditative, reflective, worshipful preparation.</li> <li>• Science and reason.</li> <li>• The arts, including music and poetry.</li> <li>• Acts of reconciliation, acts of wholeness, acts of love</li> <li>• The Spiritual</li> </ul>

	Congregations	Current and Future Generations of UUs	Heritage, traditions and ideals of UUism	Vision of Beloved Community	Spirit of Life, love, and the holy
<b>Perspective</b>	<ul style="list-style-type: none"> <li>• Both beneficiary of services and “moral owners” of Association</li> <li>• Bring reality -- what’s happening on the ground</li> <li>• Experiences, with regional and local distinctions</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Youth and Young Adults</b> -- they live with the consequences of what we do today. Youth are more likely to work together as part of a team, they are likely to be more idealistic, less jaded, they use the power of social media</li> <li>• <b>“Wandering children”</b> -- there are two groups here -- birth or longtime UUs and those who do not have a connection to a congregation – [why did they leave? what exhausted them?]</li> </ul>	<p>Ours is an evolutionary faith. We stand in a stream of history that is legitimately reinterpreted for our use and understanding today.</p>	<ul style="list-style-type: none"> <li>• Aspirational, something on the horizon, a vision of how we would like to be.</li> <li>• The I-Thou relation that Buber describes</li> </ul>	<ul style="list-style-type: none"> <li>• Are varied and sometimes contradictory and yet, if we can step back far enough and open ourselves to see it, this Source gives the perspective of the whole.</li> <li>• Name our ultimate concern (James Luther Adams)</li> <li>• Can be accessed continuously if we keep our minds open to learn that new bit of insight, that new bit of grace.</li> </ul>

<p><b>Power</b></p>	<ul style="list-style-type: none"> <li>• Direct power, through UUA Bylaws</li> <li>• Primary source of funding</li> </ul>	<p><b>Youth</b> -- symbolic power, representing the future, they are consultative in decision-making, they use consensus more often</p> <p><b>Young adults</b> -- procreative power; organizational skills and technical skills of the day; very big time pressures; need the company of other young adults; they influence their peers and listen to each other</p> <p><b>Wandering Children</b> -- withholding power, withholding money, experience, and wisdom; potential insights from their experiences; insight into the Beloved Community</p>	<ul style="list-style-type: none"> <li>• To remind us that we're situated in a living tradition.</li> <li>• To give us authority to speak as Unitarian Universalists, once we're grounded in our history.</li> <li>• To make us uncomfortable about aspects of our past about which we are not proud.</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Back</i> to our covenant, our best selves and our community.</li> <li>• <i>Forward</i> to a future vision in which we are moved to change.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide moral guidance and persuasion.</li> <li>• Make space for a variety of theological beliefs.</li> <li>• Hold us accountable to the transforming power of love.</li> <li>• Put people in a reverential state, thus changing the quality of attention they bring.)</li> </ul>
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<p><b>Theological, Theoretical Underpinning</b></p>	<ul style="list-style-type: none"> <li>• Covenantal relationship underlines theological relationship</li> <li>• UUA is Association of Congregations</li> </ul>	<ul style="list-style-type: none"> <li>• Building of human capital</li> <li>• Heritage of what we pass on</li> <li>• Your children are not your children, they are themselves</li> <li>• Sustainability of any system requires the continuity they provide</li> <li>• Wandering Children are wanderers who are keepers of wisdom and insight</li> </ul>	<ul style="list-style-type: none"> <li>• Our understanding that we have the power to decide in community, that in which we will have faith, that which is sacred to us.</li> <li>• Historical, sociological and communication theory and methods used to understand our heritage, traditions and ideals.</li> <li>• Legal theory used to develop our bylaws.</li> </ul>	<ul style="list-style-type: none"> <li>• Love</li> <li>• Our principles</li> <li>• Quantum physics, relativity, and other scientific principles about our connectedness.</li> <li>• Religious teachings about how we treat each other and the importance of community (Golden Rule, Jesus' teachings)</li> </ul>	<ul style="list-style-type: none"> <li>• The understanding of God's love as inclusive and transforming</li> <li>• Reconciliation and wholeness: seeing the Spirit of Life, Love and the Holy as reconciliation to bring together things that appear to be opposed to find sense of wholeness.</li> <li>• Each individual has the capacity to have a "direct experience of the holy" (Emerson) without the necessity of mediators.</li> <li>• "Who or what is in charge?"</li> </ul>
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