

International Unitarian/Universalist and Free Church Collaboration

A New Vision

~ Concluding Recommendations ~

September 2021

from

International Council of Unitarians & Universalists

AND

Unitarian Universalist Partner Church Council

Contents

- Introduction** 2
- 1. The Work of the Group** 3
 - A Note on Terminology* 3
- 2. Consultation Feedback** 3
 - What We Learned* 4
 - Critical Questions to For Global North/West* 4
- 3. Vision, Mission, and Action** 4
- 4. Implementation** 5
 - Dissolution* 5
 - Transition* 5
 - Accountability* 6
- 5. Decolonization of the Money** 6
 - Observations from our Consultation Conversations* 6
 - Evaluating Funding Structures* 7
 - Starting the Conversation* 7
- 6. Concluding Recommendations** 7
- Appendix** 8
 - Membership of the International U/U Collaboration Group* 8
 - In Gratitude* 8
 - Past Reports* 8
 - Job Descriptions* 9
 - Leadership and Design Team 9
 - Transition Consultant 10
 - Transitional Director, International U/U Collaboration 10

Introduction

We are at a place of possibility for a new world of International Unitarian/Universalist cooperation and collaboration. The report we have prepared is by no means the end of the story. This is not a merging of present organisations; it is a conscious effort to reach for new, inclusive directions. We are convinced that now is a unique, unusual, and ideal opportunity for international U/U and Free Church partners and friends to experiment with new forms of relationship, learning, collaboration, and action.

We encourage groups, committees and partnering teams to discuss this report together. We know any time of transition can be difficult. There will be confusion, concerns, and excitement for what is emerging.

This report proposes that the new organisation starts with a Leadership and Design Team, composed of up to 12 members, convened and facilitated by a Transitional Director for International U/U Collaboration, and charged with envisioning and implementing a new organisational framework. This framework will emphasize equity, mutuality, inclusion, active listening, and respect for our differences and our commonalities. Aware of a legacy of both idealism and inequity, we know that our future must and can be bravely different.

Our present circumstances are both challenging and opportune. Let us seize this occasion to invent ourselves anew! This report calls for us to continue our journey and to take another step forward. We trust we can count on you to join us on this journey.

Shelley Adams
Rev. Alicia R. Forde
Rev. John Gibbons
Derek McAuley (Co-chair)
Rev. Morgan McLean (Co-chair)
Rev. Fred Muir

September 2021

1. The Work of the Group

The last eighteen months have been a period of discernment and challenge for both the ICUU and UUPCC Boards and for the International U/U Collaboration Group. We began this journey in early 2020 with the active support of the Unitarian Universalist Association. We were hopeful that we would be able to envision a new future for global collaboration based on our shared values.

The International Collaboration Group has met every two weeks during this period to explore and develop this thinking. Our first report “A New Vision” was presented to ICUU and UUPCC in October 2020 and proposed a new single organisation. This was supported by both organisations and subsequently the Group continued its dialogue. As has been acknowledged, this has not been an easy process; indeed it should not have been, given the significant issues under discussion.

In April 2021 an “Update” was produced for consultation. This set out our shared learnings, our aspirations for the future and some possible organisational models. We reached out to individuals and organisations for differing views and perspectives, asking *“Who are the architects of our faith’s future in the global arena? How is power being shared?”* The developmental process that we propose will enable voices that were not, or were only partially, heard during this process to influence the future direction and structures of any new organisation. We deeply value equity, mutuality, and the sharing of power. One way to model/advance this is by ensuring that the process is intentionally inclusive.

A Note on Terminology

Occasionally during our discussions the issue of terminology was raised. In our view there is no one term that encompasses all the groups or individuals under our largest tree of “Unitarianism.” We use the abbreviation U/U to encompass both the terms Unitarian and Unitarian Universalist. Each country has experienced its own unique development of religious traditions, including merging with groups. It is important to note that “Free Church” is included in our discussion because it represents traditions in several of our communities and also keeps an open door to liberal religious communities with whom we have much in common and with whom closer relationships could be developed.

2. Consultation Feedback

In the last six months, two outreach projects gave shaping data and direction to our work and this report.

An online survey containing seven questions was taken by seventy-eight stakeholders. Respondents to the survey were from fourteen countries. A significant majority affirmed that a new international organisation is needed. Likewise, a large majority agreed this collaborative work needs to recognize and reflect a shared faith identity and diverse theologies. Aspirational words like “hopeful,” “encouraging,” and “thanks” were the most common remarks accompanying responses to these replies. Expressions of concern named “clarity,” “transparency,” and “complexity.” A majority of respondents agreed on a collaborative project that was independent of any current organisation, yet an entity that would be open and promote working relationships with established and new faith groups.

In addition to the survey, eighteen stakeholder conversations (usually on Zoom) were held with UUPCC and ICUU members and with seminary leaders, funding agencies, service organisations, ministers and two UUPCC congregations. Ninety-three people participated in these conversations facilitated by IU/UCG members. These conversations revealed many of the same kinds of responses gathered from the survey’s

questions, but given the conversational format the responses went into greater depth and detail. Using the notes taken by each facilitator, the conversations revealed:

- Anxiety regarding the continuation of services: organizing, trips, money transfers.
- Desire for greater mutual partnerships and deeper collaborative efforts and programs.
- Recognition that accessibility to funding, decision-making, and agenda-setting is a power/justice issue.
- Hope for engaging and expanding the reach of the global U/U FC movement.
- Appreciation for the legacy of the UUPCC & ICUU.

What We Learned

- In general, global north/west participants focused on process issues: goals, accountability, means and ends.
- In general, global south/east participants focused on relationships and cultural competence: sustaining deeper partnerships, addressing power imbalances in all its forms (e.g. money, language, U/U Free Church legacy), sustainability issues.
- Decolonizing wealth and “toxic charity” are challenges that must be addressed.
- Accessibility is power: A new international vision must bring all voices to our work, especially those of the marginalized whose absence have left us incomplete.
- Cultural competence must be a shaping and guiding value: understanding one's own culture and ethnicity, a willingness to learn about the cultural practices and worldview of others, a positive attitude toward cultural differences, willingness to accept and respect these differences.
- For many, our U/U faith invites us to be in covenantal relationships with each other. One significant key to faithful covenantal and cross-cultural relationship is the ability and willingness to repair hurt and harm when it occurs.

Critical Questions to For Global North/West

- How willing are we to be students and learners?
- Are we ready to engage with the ways faith/religion is practiced in the global south/east?
- Are we capable of examining, reimagining, and restructuring what it means to share resources toward a shared faith-based mission and purpose, in order to undo historic colonialist and imperialist systems?
- How can those coming to our faith community with curiosity and fluid religious identity be welcomed by the wider U/U global community, and accompanied as they form their faith identity without hegemonic influence?

3. Vision, Mission, and Action

We have reaffirmed our Vision as set out in our last report. We are not creating a mission statement, which is often mere words. We are setting forth a vision for a new way relating to each other in global Unitarian/Universalism with a clear focus for early actions.

Our vision includes a broader, more inclusive, and equitable partnership that can be adaptive and flexible to changing circumstances.

Our consultation has reinforced the need for:

- Mutual partnerships of all kinds
- Theological and Spiritual development
- Capacity building and organisational development
- Engagement across and within Unitarian/Universalist communities
- Exploration of cultural and power dynamics

As priority areas of work the focus of the new organisation should be on:

- Partnership development - in new and creative ways
- Training lay and professional leaders with culturally adaptive and accessible programs
- Supporting existing and emerging groups towards sustainability
- Exploration of mutually supportive justice-based initiatives

4. Implementation

In the April 2021 “Update Report,” options for future organisational structures were presented. The preferred option for many consultees was a collaborative project. The aspirations and the questions raised are reflected in the organisational model being recommended as the way forward and into a future organisation:

ICUU and UUPCC dissolve, with a few bigger U/UU national bodies forming a collaborative “project,” transferring all activities to them using a Memorandum of Understanding (MOU). The bodies participating in the MOU would have resources and capacity to administer and oversee the staffing, finances, and organisational/legal requirements necessary to fulfill the joint mission of the “project.”

Dissolution

We recommend that the ICUU and UUPCC dissolve, allowing for a time of transition and the emergence of a new international project. Upon dissolution, in accordance with the Articles of Incorporation and the Memos of Understanding with the Unitarian Universalist Association, all assets of those two organisations will go to the UUA. The UUA has agreed to use those assets to support the transitional emergence of a new system of international U/U relationships. The UUA has committed to continue funding this international work at the same level they were the UUPCC and ICUU.

Transition

A Transitional Consultant will be hired for a 3-month project with the newly formed Leadership and Design Team to establish group culture and norms, support the work of the group, and facilitate their process for hiring a Transitional Director.

The Leadership and Design Team will create an organisational framework for a new international Unitarian, Unitarian Universalist, and Free Church organisation, currently referred to as International U/U Collaboration. The Leadership and Design Team will be formed by up to 12 members from diverse

communities and constituencies, and will work in a covenant of mutual accountability with a Transitional Director (a position they will hire) and international U/U groups. There is a 12-month commitment and positions may be extended in the creation of a new structure. Each member will receive \$550 compensation in recognition of commitment and support for participation, including time away from existing jobs, childcare, and technology access.

In identifying members of the Leadership and Design Team a balance will be sought between those with experience of global U/U activities and those offering different perspectives, some from outside the community but sympathetic to our values and aims, with an acute awareness of the danger that we simply recreate past systems.

The Transitional Director will be a project manager, with primary responsibility for the needed tasks, and the facilitator of cooperative leadership to create an organisational structure defining international Unitarian/Universalist relationships for the 21st century. They will need to bring international and cultural sensitivity and expertise to their work with the Leadership and Design Team as well as U/U and Free Church individuals and groups.

It should be emphasised that this process is not about simply a merger of the two existing organisations. This was not supported by the consultation nor by the IU/UCG.

Accountability

Transitions require careful management. We recommend that the existing IU/UCG remain as an advisory body to the Leadership and Design Team and provide a degree of accountability during this period of change. IU/UCG members have agreed to continue to serve.

5. Decolonization of the Money

The previous report identified that the issue of money needed to be explored in our discussions. U/Us around the globe are generous with their financial and other resources. UUs in the USA as well as others in the global north/west tend to possess more financial wealth than other groups. Funds - often substantial - come mainly from the USA and the UK to support U/U congregations and groups around the globe. We concluded that the structures for how this money is distributed have not been critically evaluated in order to make relationships more equitable among the international U/U community. We also acknowledge that national cultures, even within the global north/west as well as the global south, have radically different approaches to money and fund-raising.

Individuals and groups, both on the giving and receiving end of financial gifts, have found challenges around money.

Observations from our Consultation Conversations

- Cultural differences and unclear expectations around acknowledging gifts, asking for support, and communicating afterwards
- Unrealistic expectations from the giver that they receive better treatment because of their gifts
- Hosting international guests can be a financial burden on the host, and honest conversation is needed about those costs.
- Some individuals and groups have more knowledge, personal connection, or easier access to funding sources.

- American UUs have sometimes had a louder voice, rather than an equal voice.
- Some receivers of gifts use the funds for their basic living needs, and to question or change gifts could have serious impact.
- Some U/Us living outside of North America and Western Europe have used connections with those U/Us living in those places to leverage power.

Evaluating Funding Structures

Reimagined funding structures should encourage:

- More systematic, deliberately designed distribution of funds.
- Those receiving funds to be the ones to identify the needs, and ultimate use, of gifts.
- Transparent processes for applying for and receiving funds.
- Clear expectations of communication and accountability with use of funds.
- Access to travel funds to allow for greater participation in relationships and collaboration.

Starting the Conversation

We suggest that existing formal and informal partnerships have frank conversations about money. Start by asking “What would the Partnership or relationship look like without the sharing of financial gifts?” This is an area for further exploration and development by the Leadership and Design Team.

6. Concluding Recommendations

In conclusion the IU/UCG recommends:

1. That ICUU and the UUPCC take all necessary steps to dissolve by 31 December 2021.
2. That ICUU and the UUPCC support the formation of a Leadership and Design Team to take forward the proposal in this report, with support from a Transitional Consultant and a Transitional Director as well as the IU/UCG acting in an advisory role.
3. That the UUA, as the ultimate custodian of any outstanding funds of the ICUU and UUPCC, commit to use these funds to support this proposal.
4. That conclusions in this report surrounding the importance of how funding is structured and discussed be considered by all those currently involved in Partnerships and existing international U/U relationships, and in the thinking of the new Leadership and Design Team.
5. That all those currently involved in international collaboration work, individually or representing a national organisation or an individual congregation, commit to engaging with the developmental processes, bringing their distinctive and unique contributions.
6. That all those currently involved in international collaboration work, individually or representing a national organisation or an individual congregation continue to offer the same level of financial support to ensure a successful transition and emergence of a new way forward.
7. Existing international U/U relationships be supported during this time of transition by national organisations.

Appendix

Membership of the International U/U Collaboration Group

International Council of Unitarians and Universalists (ICUU):

Shelley Adams

Rev. Sara Ascher (Until 30 June 2021)

Derek McAuley (Co-chair)

Unitarian Universalist Partner Church Council (UUPCC):

Rev. Roger Bertschausen (until 31 July 2020)

Rev. John Gibbons

Rev. Morgan McLean (Co-chair)

Rev. Fred Muir (from 28 May 2020)

Unitarian Universalist Association International Office:

Rev. Alicia R. Forde

Robert Kipp (Administrative support)

In Gratitude

We would acknowledge our thanks to Rev. Sara Ascher and Rev. Roger Bertschausen for their contribution to the earlier work of the International U/U Collaboration Group and to Robert Kipp of the UUA International Office for his excellent administrative support. We would like to thank everyone who has participated in our discussions over the last eighteen months and the Boards of ICUU and UUPCC for their support. The Report and its recommendations are, however, solely of the International U/U Collaboration Group.

We believe that international U/U relationships transform individuals and communities. We give thanks to all those who will join us, and the generations to come who will continue to deepen the connection of Unitarian and Unitarian Universalism and Free Churches around the globe.

Past Reports

A New Vision, September 2020

<https://icuu.net/2020/11/23/a-new-vision>

A New Vision: Update, April 2021

<https://icuu.net/2021/04/22/new-vision-update-report-2021>

Job Descriptions

Leadership and Design Team

The composition and work of the group should reflect and be shaped by a new anti-colonial, anti-imperial, diverse and welcoming 21st century outlook that emphasizes listening and power sharing. The goal of the Leadership and Design Team is to create an organizational framework for a new international Unitarian, Unitarian Universalist, and Free Church organization, currently referred to as International U/U Collaboration.

The Leadership and Design Team will be formed by up to 12 members representing diverse communities and constituencies, and will work in a covenant of mutual accountability with the Transitional Director and international U/U groups.

There is a 12 month commitment and positions may be extended in the creation of a new structure. Each member receives \$550 compensation in recognition of commitment and support for participation including time away from existing jobs, childcare, and technology access.

Responsibilities:

Emergent Leadership

- Mentor and coach each other in finding anti-imperial and welcoming ways of working.
- Demonstrate curiosity, act as sounding board, offer honest advice and unique perspective
- Model the intercultural, multi-language approach desired for the future

Communication and Liaison

- Communicate to constituents regularly and clearly
- Seek representative communication from international U/U groups
- Assist relationship building with key stakeholders
- Serve as liaisons to U/U groups for communication

Creation of International U/U Collaboration

- Provide a vision for a new way of implementing the new organisation's mission.
- Work with the Transitional Director to co-create the organizational structure of International U/U Collaboration.
- Build on the work of the International U/U Collaboration Group using notes, reports, and recommendations
- Explore additional existing programs of international work of current U/U communities for opportunities of learning and further collaborations
- To identify the process and undertake the appointment of new leadership for the new organisation
- Assist with information gathering
- Perform required tasks as needed

Qualities Desired

- Ability to think in new and creative ways

- Agility and humility working with others outside one's own cultural context/heritage
- Comfort with the unknown, openness to discernment
- Thinking that bring both breadth and depth in approaching the work
- Commitment to transparency

Additional Requirements

- Comfort meeting online and use of online tools
- Stable internet connection (to be secured by the compensation provided)
- Knowledge of and ability to work in the English language

Transition Consultant

3 month position, 1 November 2021 - 31 January 2022

This consulting position will work with the newly formed Leadership and Design Team to establish group culture and norms, support the work of the group, and facilitate their process for hiring a Transitional Director.

The Leadership and Design Team is accountable to the international constituents (national U/U bodies and individual U/Us) involved in this work.

The UUA is the fiscal agent.

Skills and experience

- Organisational development and consulting skills
- Intercultural awareness

Transitional Director, International U/U Collaboration

12 month position

31 January 2022 – 31 January, 2023

The Transitional Director will be a project manager, with primary responsibility for the needed tasks, and the facilitator of cooperative leadership to create an organizational structure defining international Unitarian/Universalist relationships for the 21st century.

They will need to bring international and cultural sensitivity and expertise to their work with the Leadership and Design Team as well as U/U and Free Church individuals and groups.

This position's reporting structure is one of mutual accountability with the Leadership and Design Team through a shared covenant. The Transitional Director and the Leadership and Design Team are, in turn, accountable to the international constituents (national U/U bodies and individual U/Us). The Transitional Director will work with the UUA's International Office Director, who will be a member of the Leadership Cooperative, for financial accountability.

Project Management

- Convene and provide administrative support to the Leadership and Design Team
- Define and embody the larger meaning of the work
- Hold the group accountable to a manageable timeline
- Keep implementation on track
- Individually execute appropriate tasks
- Facilitate group dynamics with attention to power and privilege
- Undertake financial accounting
- Identify and contract with consultants for expertise as needed

Facilitate the Work of the Leadership and Design Team

- Create a covenant to define how they will move forward together and with transparency outside of the group
- Provide resources for exploring innovative ideas for the future
- Engage new and emerging voices
- Facilitate discussion regarding direction and strategy setting
- Understand resources from previous work of the UU Partner Church Council and the International Council of Unitarians and Universalists, communicate with previous stakeholders as needed.
- Create the organizational infrastructure for International U/U Collaboration based on their stated values and mission, including leadership and staff, and membership.
- Secure access to funding for International U/U Collaboration

Skills and Experience

- Comfort meeting online and use of online tools
- Intercultural and international competence
- Knowledge of and ability to work in the English language
- Knowledge of another language used within the UU community is desirable
- Organisational and administrative skills
- Appreciation of the qualities and dynamics of the Unitarian and UU global community
- Integration of decolonial approaches