



All Souls Church Unitarian

Transformation Team

A Report from the All Souls Board of Trustees

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It is not a given that we are where we want to be, just because some diversity is present in the church. The magnitude of the break in community trust is directly connected to the magnitude of the opportunity for change. It is time for us to define how our community shares this ministry.

We are a work in progress and we will do the learning we need to do, while we work, and worship and live together. Life is the classroom that can teach us how to succeed. So, we begin again in love.

Paula Cole Jones

All Souls Church's Multicultural Commitment: A Brief Historical Overview, December 2018

INTRODUCTION

In December 2017, the All Souls Congregation became one of the first churches in the Unitarian Universalist Association to adopt and affirm the 8th Principle:

Journeying towards spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions.

Just a month later, however, conflict hit the church, with the end of Rev. Susan Newman-Moore's ministry at All Souls. That conflict had a clear racialized impact that caused and resurfaced pain for many congregants, and it raised serious questions about how well church systems aligned with the 8th Principle. In response, the Board of Trustees voted in April 2018 to create an ad hoc committee – **the Transformation Team** – charged with advising and assisting the Board on staffing, accountability, and governance changes to align the institutional framework of the church with the 8th Principle.

For the next several years, the Team, under the leadership of initial **co-chairs** Paula Cole Jones (co-chair, April 2018 – January 2020) and Ken Ambrose (co-chair, April 2018 – August 2018), and then Pamela Sparr (co-chair, October 2018 – November 2021) and Derek Robinson (co-chair, January 2020 – November 2021), made numerous recommendations to help the church live up to the 8th Principle.

The Team regularly met as a whole, and its members included Board-appointed representatives from various communities within All Souls. The Team also included several distinct **work groups**—Governance & Accountability; Trust & Reconciliation; and Anti-Racism, Anti-Oppression/Diversity. A background on those groups, their formation, and their initial recommendations is available in the Transformation Team's initial December 2018 report to the Congregation, which is part of our church archives and was distributed to the Congregation in December 2018.

Much has changed at church and in the world since those initial recommendations in December 2018. This report draws together the **individual voices** of several people involved with the Team to **summarize their work** and **this chapter** in All Souls' journey towards building a Beloved Community. Specifically, this report includes:

- Reflections from Pamela Sparr, who co-chaired the Transformation Team with Derek Robinson.
- A summary of the work of the Trust & Reconciliation Work Group, prepared by Kyla Dixon and Peter Montgomery, who led that group.
- A summary of the work of the Governance & Accountability Work Group and Governance Task Force (another ad hoc Board committee), prepared by Neil Manzullo, who was a member of both groups.

- An appendix with a history of All Souls’ multicultural legacy, prepared by Paula Cole Jones in December 2018 as part of the Team’s initial report to the Congregation.

Since this **report focuses** on the work of the **Team**, which was a **Board committee** and made recommendations primarily to the Board, the report’s focus **cannot cover** the plethora of **actions** and **cultural shifts** that took place **elsewhere** in the church’s ministries and programs throughout the past few years to embody the 8th Principle. The Board knows, however, that staff members and congregants have spent countless hours on that work, and **welcomes opportunities to celebrate it**. Living into a new principle, living through church conflict, and living through a pandemic—all while keeping All Souls Church a place that we can come to worship and learn and express our joys and woes—is not easy, but the staff have managed to do just that.

The Board is also **deeply grateful** for the work of Executive Director Traci Hughes-Trotter, Reverend Kathleen Rolenz, and now Reverend Bill Sinkford. They have been partners in helping the Board navigate the pandemic and its strains while also taking needed steps to implement recommendations from the Transformation Team. From the pulpit, Reverend Rolenz and Reverend Sinkford also repeatedly discussed both the conflict that sparked the creation of the Transformation Team, as well as past conflicts related to race. An open acknowledgment of conflict was a key recommendation from the Team’s Trust & Reconciliation work group, and their openness, as well as lay-led “Transformation Sundays” and Reverend Rob Hardies’ own openness during his tenure, gave the congregation space to understand and grow from the pain of past conflict.

The **journey** called for by the 8th Principle **continues**. At the **Congregational level**, the Congregation has just adopted new Church Goals that in many ways embody the 8th Principle, and we must now pursue those Goals with our time, talent, and treasure. At the **Board level**, the Board has adopted large-scale governance reforms that attempt to weave the 8th Principle into how we govern, and we must now live into those promises. At the **staff level**, a new team—the 8th Principle Advisory Team—has been created to help realize the 8th Principle through the concrete programs of the church, and we must support them and the other programs and activities of the church so that this church, one of the homes of the 8th Principle, can thrive. And, beyond All Souls, at the **Associational level**, as we prepare this report, the Unitarian Universalist Association is considering a large scale re-write of the Association’s principles to capture the values of the 8th Principle. We are glad to be with All Souls on that journey.

*All Souls Board of Trustees
December 2022*

TIMELINE

This report covers the work of several different work groups, committees, and teams, and many of them have overlapping names. This timeline covers the work of the groups mentioned in this report; it cannot cover the breadth of the 8th Principle work going on at All Souls.

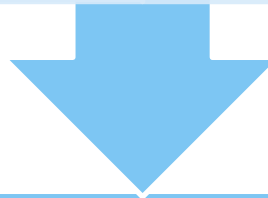
Early Work: Team and its Work Groups

Board creates
Transformation
Team (Apr. 2018)

AR/AO Work Group
(2018)

Governance Work
Group (2018-19)

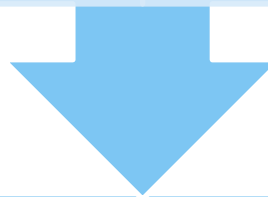
Trust &
Reconciliation Work
Group (2018-19)



Middle Period: Team and Board Work

Transformation Team continues its
work

Board creates Governance Task Force
(2019-21)



Recent Work: Wrap-Up and 8 Team

Transformation Team wraps up its
work (Nov. 2021)

8th Principle Advisory Team created
(Nov. 2021)

REFLECTIONS ON LEADING THE TEAM

Appreciations

In reflecting on the impact and legacy of the Transformation Team, it is important to begin by acknowledging the deep debt of gratitude we owe its founders and members. We want to first lift up the vision, commitment, tremendous energy, and time Paula Cole Jones has given to this church in terms of setting in motion various processes to help us heal, as well as to deepen our understanding and practice of the 8th Principle. Paula worked with Board members Tracy Zorpette and Ken Ambrose to birth the Team, and then became its first co-chair.

It takes special people to say “yes” to a volunteer position in a highly charged environment, with a hurting congregation and significant breaches of trust in many directions. Further, for most of these volunteers, their Team membership meant even more time and effort devoted to All Souls because they were representing specific groups in which they were active at All Souls – and so took on double commitments. These commitments grew even heavier with the pandemic and the extra weight Covid created for their church responsibilities on top of all their other ones. The Appendix on page 34 lists all who officially were a part of the Team at some point in its life from April 2018 to its conclusion in November 2021.

ADORE (A Dialogue on Race and Ethnicity), the 8th Principle Task Force, the Committee on Right Relations, and the Committee on Ministry, as well as the committees and groups represented on the Team, all played important roles at various stages and places in our work to date and deserve our congregation’s appreciation as well.

Critical Tasks

The Team strove to help rebuild trust among members of the congregation, between the congregation and the Board, and between members of the congregation and the ministerial staff. In addition to attending to broken trust and hearts, we were charged to advise the Board on the content and processes for structural repair and change. It meant we played a strategic advisory role – sometimes in a proactive way, and at times, reactive – at the request of the Board. Among other things, this meant helping to identify and possibly establish new practices of transparency, accountability and governance. It meant working with staff, Board members and lay leaders to identify how to embody the 8th Principle at the center of all aspects of how we “do church.”

Accomplishments & Lessons

We began our work in 2018 by focusing on acknowledging the conflict and the pain, identifying and addressing the harm done, listening to the concerns of the congregation and organizing to address concerns. A discussion of the vital, very skillful work led by the Trust & Reconciliation workgroup appears later in this report. This included:

- 1) numerous private confidential listening sessions with disaffected members;
- 2) the creation of lay-led Transformation Sunday services with after-service listening sessions; and
- 3) carefully constructed truth-telling and reconciliation conversations (individual and group).

Additionally, Team co-chair Paula Cole Jones introduced the practice of “A Community of Communities” and facilitated two Saturday gatherings to engage in deep listening to congregants’ needs, feelings, and ideas related to healing and positive next steps. These were critical preliminary steps supporting the Trust & Reconciliation work group’s process. The Community of Communities approach also tested a new way of better discerning needs and opinions among different segments of our congregation – particularly those which are significant but may be in the numerical minority or otherwise unnoticed.

What we came to see as Phase 2 of our work – more significantly rebuilding relationships, developing new structures and processes, and learning new skills and ways of relating -- began to take the majority of our time and attention in 2020. This involved regular meetings with staff, 8th Principle educational and skill assessments, as well as advising the Board on ministerial transition planning and Executive Team restructuring. The Board created its own Governance Task Force in 2019 to process the insights and recommendations from the Governance Work Group’s detailed 2018 report. Their extensive deliberation began to bear fruit after 2020 and is continuing to do so now. (An excellent review of the governance work follows later in this report.)

A few Team actions warrant specific mention as they resulted in important turning points and lessons:

Educational Assessment. In 2020, we recognized the need for and conducted a baseline 8th Principle educational assessment. This involved private one-on-one conversations using a questionnaire we developed with 11 staff and lay leaders of a variety of committees and groups at All Souls. We had several goals for this:

- 1) Identify what kinds of active conversations, education and training had already been done or is being done related to the 8th Principle at All Souls.
- 2) Better understand where different communities are in terms of their understanding of what anti-racist, anti-oppressive practice means for their efforts as well as what skills and sensibilities they feel they need;
- 3) Identify where and what kind of spiritual support or practical coaching could be helpful; and
- 4) Identify assets inside All Souls (people and tools) which can help us to live out the 8th Principle.

Upon consulting with various long-standing lay leaders involved in education and racial justice at church, it appears that ***this was the first time in living memory that the church had engaged in a comprehensive racial-justice focused educational assessment.***

Several leaders participating in this project expressed their appreciation for having a safe space in which to share their insights, concerns, frustrations, and needs in a non-judgmental setting. Our conclusions and recommendations based on these conversations were shared with Reverend Sinkford,

and were used to inform the development of further Anti-Racism, Anti-Oppression Adult Spiritual Development offerings, as well as fed into staff processes related to their own professional development.

- ▶ **We advise that this kind of educational and skill assessment be done regularly as a way of tracking our progress, and enabling staff and lay leaders to keep current as to congregant needs and best practices.**

Our Educational Assessment was designed to compliment another key project – an 8th Principle **Organizational Assessment** (OA) with the Board, Board Committees, staff and lay leaders. The Organizational Assessment used Paula Cole Jones’s 7 Levels of Readiness[®] tool to look at specified phases of 8th Principle practice as it applies to organizational functioning. The Team as a whole participated in our own OA training and assessment. The Board worked through the Assessment in October 2020, and Team members led Young Souls as well as the Adult Spiritual Development and Religious Education committees through their own processes. Various All Souls committee leaders received an initial orientation at a February 2021 Church Council meeting.

- ▶ **Many leaders appreciated having help identifying concrete practices and steps to put some shape to their commitments to live into the 8th Principle. Coaching on this will be an important part of the new 8th Principle Advisory Team’s work.**

Structural and Transition Planning Recommendations. Perhaps our most immediately and significantly consequential actions took the form of recommendations and other advice to the Board. In February 2019, we recommended that the Board establish a co-equal multiracial executive team that answers to the Board. Neil Manzullo, our Board president, discusses this major structural change in his report that follows. In October 2020, along with the 8th Principle Task Force, we recommended that the Board delay the search process for one or two called ministers. After consulting the congregation, it concurred – first for one year, and recently, in response to a financial shortfall, for another.

On two different occasions, we also recommended immediately hiring a contract minister of color to test a co-ministry model. While the church has hired ministers of color under different arrangements, the church has not yet tested a co-ministry model. When the Board formed a Ministerial Search Committee in the spring of 2022, it charged that committee with finding “the best minister or ministers for All Souls,” allowing the search to include a consideration of the possibility of a co-ministry model. As part of this process of advising the Board, we produced a short briefing paper for the Board on key concepts related to ministerial arrangements.

- ▶ **It is important for parishioners to understand that at this point in our church’s history, the Team feels that a co-equal multi-cultural ministry team is a vital, necessary step to address**

many kinds of structural staffing inequities that arise by having a sole senior minister of any identity. We have made important strides by having the Executive Director and Senior Minister co-equal, collaborate more deeply, and jointly report to the Board, but we have this additional structural step to take. It is extremely fortuitous that we have Reverend Sinkford with us who has direct experience of such organizational arrangements.

We also worked with All Souls Board members, the Executive Director, Interim Senior Minister Kathleen Rolenz, the Minister for Social Justice, the Moderator, leaders of the Leadership Development & Nominating Committee, the Committee on Right Relations, and 8th Principle Task Force to develop a **collective map and multi-year timeline of 8th Principle initiatives underway** in which to situate ministerial hiring, and the various policy, educational and multi-cultural change processes occurring. Our hopes were that by creating this **collective road map**, all our efforts can be more cohesive, synergistic and transparent to church leaders and the congregation as well as provide some needed structure for our ministers as well as lay leaders. Our hope was that this process would also help the Team determine our priorities for 2021 and beyond.

This grouping of leaders had two very constructive conversations. We produced a list of key actions as well as the beginnings of a timeline. As 2021 evolved, it became clear that the composition and structure of the Team as a Board Committee was not necessarily the best fit for the next steps in our journey as a church to advance the 8th Principle. Additionally, the ongoing pandemic had overtaxed most of our Team members and slowed progress on many fronts. The map is now in the hands of the new 8th Principle Advisory Team. One of the co-chairs, Reverend Keithan, was a part of the roadmap conversations, as was Derek Robinson, a Transformation Team co-chair who will help provide background and offer much-needed continuity as a member of this new team. Current Board president, Neil Manzullo, and past Board vice president Cathy Tortorici were involved in these conversations as well, so brought the work into the Board.

Outcomes

We rarely did our work completely alone. Thus, below are outcomes where we were heavily involved, either alone or more likely, in collaboration:

- 1) Noticeable improvement in the congregation's trust and respect for the Board of Trustees.
- 2) At least some members who felt very hurt and otherwise disaffected as a result of the departure of Reverend Susan Newman-Moore have felt heard, and some have been restored in additional ways.
- 3) A new formal church commitment to a co-equal, collaborative Executive Team.
- 4) A slowing down of our ministerial search which enables us to do more governance and self-change work to better prepare ourselves for the kind of future we want. This also enables the Committee on Right Relations to get further along in their transformative justice work and reconsideration of our congregational covenant before.
- 5) The 8th Principle began to get firmly rooted in All Souls culture.

- 6) Ministers, lay leaders and congregants experience new processes for gathering input from, and new attention paid to the spiritual needs of congregants who are Black, Brown, Indigenous, Asian Pacific Islander, and people of color.

Observations, Recommendations and Hopes for the Future

As the Team disbanded a year ago, the reflections below are solely my own, based on my experience as co-chair.

Shared Ministry: Shared ministry refers to an underlying religious practice/philosophical approach to the functioning of a spiritual community, where all members of that community are involved in ministry. Often congregants, and sometimes ministers, are unclear about what this concept means, why it is needed, and where it is happening at church. ***The last 4-5 years have provided us with a stark object lesson of what it looks like and why shared ministry needs to be a cornerstone of how our church works and its culture.***

The incredible amount of love, emotional intelligence, talent, time and energy poured into the transformation process by Team members and members of related work groups and allied committees – all lay people – was essential in helping our congregation begin to heal. At times we could create spaces of trust and safety when clergy could not. At times, we were uniquely positioned to be able to offer the kind of consolation needed. At times, we could offer creative ways of doing something that would help the church get out of old ruts. Our practices and recommendations helped turn a tragic situation of dysfunction into a necessary learning and change process that can bring us closer to the kind of right relationships, the Beloved Community, we all yearn for. Shared ministry is a spiritual practice and practical arrangement we need in hard times and good ones.

Institutional Change: As many of our Board presidents will note, as well as Leadership Development & Nominating Committee members, few congregants have a passion for institutional maintenance or change work – particularly in troubled times. Cathy Tortorici and Neil Manzullo worked so hard on the Governance work group. It was hugely useful when they then agreed to run for the Board. This meant that they could immediately put to work the expertise and insights they gained and more easily connect with the Team. Similarly, it was extremely helpful that two Board members who served as liaisons to the Team, Nadine Ramos and Libbie Buchele, took on Board leadership roles – again, more easily bringing Team ideas and insights into the Board’s discussion and decision-making. We owe a deep debt of gratitude to all who served on the Board these past 5 years, and particularly these 4 individuals. ***I do not know if we would have had the positive outcomes that we now have, if there had not been this interplay between the Team and the Board. Similarly, while few congregants enjoy getting into the weeds re: having opinions on bylaw and other policy changes, this work is critical in creating the kind of institutional structure that will better serve our vision.***

Consultation Processes: The Team and its workgroups employed many different consultation processes – large and small listening circles, restorative justice conversations, “Community of

Communities” gatherings, Church Council meetings, “expos” in the Sanctuary where people could wander to talk about different subjects at different stations with lay leaders, and after-Service reflection circles. ***As we wrestle with how to be a “hybrid” congregation and one with well-functioning, vibrant processes for consulting and accountability, having multiple process options and skilled staff and lay facilitators ready to assist in making them happen is crucial. Getting people ready to serve in these capacities is not difficult – it just takes attention.***

Accountability Processes: Hosting various types of consultation sessions can also provide another layer for much-needed accountability work. ***An important item for the church’s “to do list” is to work with the new 8th Principle Advisory Team to establish a rigorous and manageable system to track how we are moving forward on specific goals and targets re: embodying the 8th Principle, and where we are falling short. This requires a basic current joint work plan covering what staff, lay leaders and the Board will take the lead on, and better and more mechanisms to report the results to the congregation, staff and lay leaders.*** The work plan needs to include a clear description of what we’re trying to accomplish and, critically, how we’re trying to do it as well as a clear plan (including sequence, roles, and responsibilities) for the work, so that (a) steps of the work build logically on each other, (b) we’re not duplicating effort or getting in each other’s way, and (c) the work is sustainable because we’re not trying to do everything at once.

Underlying accountability processes are covenants of right relationship as well as work plans. While there has been progress among staff and clergy in establishing covenants amongst themselves, and amongst Board members, we have yet to develop a new covenant for ministers in relationship to the congregation. This was one of the gaping holes identified by the crumbling of church life in 2017-2018. This is part of the work of the Committee on Right Relations, and will need to be carefully orchestrated in relationship to our search process. Again, this is an area where Reverend Sinkford can be helpful in advising us.

Education, Skill-Building & Soul-Building: Our assessments and listening sessions surfaced some very major needs among congregants. Two of the most fundamental were:

- 1) ***The inability of many congregants to be able to envision and articulate what the 8th Principle means concretely in their own lives or the life of All Souls.*** We know we have achieved traction when the majority can comfortably, easily, honestly, and with some degree of excitement, talk about this. We are not there yet. How is this kind of change going to happen?
- 2) ***The need to center spiritual growth in the transformation process.*** Related to question #1, it is not clear that the typical congregant understands why this is a matter of spiritual growth, or what that might mean. It is not clear that many lay leaders feel able to assist with this. If they are comfortable at all, this comfort is more in the realm of helping with practical changes, with informational and educational enrichment, and *perhaps* some emotional/psychological work. How do we articulate what the soul dimension is? In addition to powerful, enlightening Sunday services, what else needs to happen?

While the new 8th Principle Advisory Team will be focusing its attention on crafting and launching a comprehensive educational and coaching plan, volunteers should not be expected to chart this all out, organize the curricula, and find all the volunteer facilitators and coaches. Both of the above questions,

as well as many pieces of the road map would benefit from us having a full-time Director of Religious Education—a person with the **experience, vision and talents to plan and support our educational activities and to help us work synergistically with other staff to weave personal growth and enhancing practical competency into all aspects of church programming.**

Conclusion

All Souls is treading new ground in living into our aspiration of being a healthy, authentically multi-cultural spiritual community dedicated to Unitarian Universalism’s 8th Principle. Given the paucity of complete models for us to use as guidance (although there are important examples of certain aspects of “doing church” which we can and should learn from), we realize we are going to have to make the road by walking it.

Creating cultural and structural change in any organization is messy and complex, particularly in a congregation which operates with a relatively flat hierarchy and a strong wish for collaborative leadership and “shared ministry.” Facilitating this kind of comprehensive change is not something many people are trained to do or enjoy. This requires deep emotional intelligence and care to support and nurture staff and congregants. It requires comprehensive process and systems thinking to facilitate the needed change. It requires flexible, trusted, effective systems of communication, consultation, decision-making and accountability. Finally, it requires grace, trust in the unknown and each other, flexibility, humility, and willingness to evolve as the process unfolds.

Blessings on the new 8th Principle Advisory Team, staff, and all our congregants helping to lead this work! It has been an honor to learn and grow through serving the church as the Transformation Team’s co-chair.

*Pamela Sparr
Transformation Team Co-Chair (October 2018-November 2021)*

TRUST & RECONCILIATION

Overview

The Transformation Team’s Trust and Reconciliation Work Group (“the Work Group”) formed in late 2018 and began a process of **deep listening** and **witnessing** with fellow congregants. The initial phase of work in early 2019 included over **50 individual interviews**, led to a report summarizing findings, and **Transformation Sunday Services** where some of the impacts of the conflict were named publicly and were brought to the entire congregation.

The Work Group consisted of thirteen members who worked together in the winter and spring of 2019, holding over 50 individual interviews, facilitating three restorative circles, and coordinating Sunday services with other Transformation Team and church leaders. This Work Group dissolved in 2019 and left its work to the **Committee on Right Relations**, which has hired a consultant team to support the process of infusing transformative justice practices throughout the church. In **2023**, a community of practice groups will begin meeting and the work of building out and engaging in **transformative justice** practice will enter its next phase of work.

Below are some of the key findings from the interview process and a few more details about actions taken by the Work Group. A fuller report of our findings can be [viewed here](#).¹

Interview Process: January - March 2019

Members of the Work Group **interviewed** more than 50 members of the All Souls community who were strongly affected by circumstances surrounding the 2018 departure of Rev. Susan Newman-Moore. Some interviewees were contacted by members of the Work Group; others responded to an invitation the Work Group extended to the congregation.

The Work Group’s **goal** was not to try to take a representative survey of the views of the congregation or any particular community within it, but to **listen** to the **concerns** of those who to varying degrees have lost trust in the church or its leaders or are dealing with disappointment in how the community responded in a moment of conflict.

Themes from Interviews

In consultation with the interviewees, members of the Work Group **identified themes** and **concerns** that called out for the attention of the clergy, board, and members of the congregation. Among them:

¹ Memo re Trust & Reconciliation Conversations,
https://docs.google.com/document/d/1Bs9Ujn65TyD6druTCOLfE_vWrJslq7pAFxxkhxxnNXM/edit

- A need to **acknowledge**, not ignore or dismiss, different kinds of pain that people are holding, and to create multiple opportunities for people to have their concerns raised and addressed.
- A need for greater **transparency** from church leaders, and in particular Rev. Hardies, about what happened, lessons learned, and changes being made to prevent similar harms in the future.
- A need for a recognition that the legal process and separation agreement have made it **harder** for members of the congregation to **have** their **questions answered** and concerns resolved.
- A need for congregational consideration of the **Covenant of Right Relations** and how it can be more effectively embodied and applied in time of conflict without silencing any voices.
- A need for open grappling with the ways that **white privilege** and **white supremacy** are present in our **governance structure**, operating **procedures** and congregational **culture**, and the impact they have on Black people and other people of color.
- A need for ongoing, **long-term strategies** for maintaining congregational focus on implementing the 8th Principle and continuing congregational engagement around the building of beloved community and repairing it when necessary.

Action Steps from Interviews

Based upon the identified themes, the Work Group recommended a set of actions for itself and the Transformation Team, and for Rev. Hardies, the Board of Trustees and other church leaders, and members of the congregation. Among the **recommendations**:

- Create multiple opportunities for people to engage in facilitated **restorative small-group conversations**, including people of color, those who wish to engage directly with Rev. Hardies, and those who wish to explore questions of covenant and beloved community.
- Dedicate multiple **Sunday worship** services to themes of transformation, trust and reconciliation, and use them to name the pain that is being held, call for transformative change, and offer opportunities for reflection and reaction.
- Have the Board be as **transparent** as possible about steps taken during the conflict, about its evaluation and expectations of Rev. Hardies' leadership on reconciliation and transformation
- Make **structural changes** designed to make church **operations** and leadership structures more accountable and equitable.
- Build congregational **capacity** for having **challenging conversations**, dealing constructively with conflict, and recognizing and dismantling racism and other oppressions in ourselves and our institutions.

Accomplishments as of November 2019

Specific steps were **taken** in 2019 in response to the needs identified and recommendations made by the Work Group:

- Rev. Hardies engaged in the Trust and Reconciliation process through one-on-one conversations with members of the Trust & Reconciliation work group and the congregation,

facilitated **small-group conversations** grounded in principles of restorative justice, and open-hearted sharing from the pulpit.

- The Board assigned two liaisons to meet and work with the Transformation Team.
- The Transformation Team and Trust & Reconciliation **Work Group**, in collaboration with clergy and worship leaders, **prepared and led Sunday worship services** in May, June, and September 2019 that **dealt openly** with the aftermath of the **departure of Rev. Susan Newman-Moore** and offered the congregation opportunities to consider ways that we can collectively address challenges we face in fulfilling our commitment to the 8th principle and our mission to create multicultural beloved community.
- The Transformation Team and Trust & Reconciliation Work Group held two Saturday **listening sessions** for All Souls members and friends impacted by the conflict, as well as open facilitated conversations following the May and June worship services. A Sunday listening circle offered people an opportunity to engage on the idea of a covenant.

*Kyla Dixon & Peter Montgomery
Trust & Reconciliation Work Group, Co-Chairs*

GOVERNANCE & ACCOUNTABILITY

Since the creation of the Transformation Team, **two significant groups** have shaped governance and accountability reforms at All Souls: the Governance Work Group and the Governance Task Force. These two groups recommended numerous reforms that the Board has adopted during the past few years. Those reforms have focused on understanding the Board's governance role, incorporating the 8th Principle into our governance structures, effectively monitoring the Executive Team, and making the Board demonstrably accountable to and transparent with the Congregation.

The Governance Work Group

The Transformation Team included several work groups, and **Cathy Tortorici led** one focused on governance and accountability. Membership shifted over time, but more than a dozen people regularly participated in the work group's meetings. Beginning in the spring of 2018, the group met weekly for most of 2018, and it produced a lengthy **report** to the **Congregation in November 2018**, which was distributed at the Annual Meeting as part of the Transformation Team's report. Based on the group's own research and a review of the thousands of comments collected early in the transformation process from congregants, the report included **numerous recommendations** for improving the **governance and accountability** structures of the church. The group continued to meet until mid-2019, refining its recommendations, and working with Paula Cole Jones to discuss with the Board the idea of having a co-equal Executive Team at All Souls.

The Governance Task Force

Building on the work of the Governance Work Group's recommendations, the Board created a Governance Study Team (later re-titled the Governance Task Force) in April 2019. Led by **Erika Landberg** and **Bob Jayes**, other members included former Board presidents, governance experts, and Transformation Team Governance Work Group representatives—Brenda Barbour, Barbara Corprew, Tom Fox, Neil Manzullo, Cathy Tortorici, and Chuck Wooldridge.

The group's **charge** was to evaluate All Souls' policy governance framework and recommend specific changes to it and the bylaws based upon *Governance and Ministry* by Rev. Dan Hotchkiss and the 8th Principle. The Task Force reviewed a variety of prior studies on All Souls' governance system and worked for approximately two years, producing recommendations for the Board, including recommending the creation of an entirely new set of policies focused on the church's Anti-Racism, Anti-Oppression commitment, which were adopted in the spring of 2021.

Clarity about Roles

During the past several years, the Board has focused on **understanding** the **roles** of various groups in the church, such as the Congregation, Board, and staff. The first **recommendation** of the Governance Work Group was to **clearly define** the **role** of the Congregation in church operations and to **eliminate**

conflicting governance systems, and a primary recommendation of the Governance Task Force was that the Board engage in education and training on governance.

In order to more clearly understand its role, the Board has committed to a practice of **governance orientation** and training, **refreshed** its **board handbook and manual**, participated in **educational sessions** for the Congregation about how governance works at All Souls, posted **information** on the church **website** about church structures and responsibilities, published information in the **weekly bulletin** about governance and roles, and attempted to understand where and how the Board will lead (through writing policies and Church Goals that reflect our values, and monitoring those policies) and where it will follow (through respecting the administrative and programmatic decisions made by church staff, as long as they are in compliance with our policies). The Board is also currently engaged in a **comprehensive review** of the church's **bylaws**, which will hopefully continue to more clearly define the roles of the different groups within the church.

Following the Governance Work Group's recommendation to **regularly review** the church's Policy **Governance Framework**, the Board has made major edits to that Framework, and set up a process for it to be regularly reviewed. While the Framework had only been updated three times since 2011, the Board **updated** it **seven times** between August 2020 and May 2022, including **major changes** that more clearly defined the role of the Executive Team and integrated the 8th Principle into our decision-making and monitoring. The Board also refreshed the terms of reference for its Governance Committee, so the committee is clearly charged with **reviewing** the governance **framework** at least **annually**.

One aspect of seeking clarity about roles has been navigating the church's shift to a **new structure for the Executive Team**. On the recommendation of several Transformation Team members to pursue an Executive Team structure based upon co-equality, collaboration, and multiculturalism, the church hired a new Executive Director in the spring of 2019 and made that position **co-equal** with the role of the Senior Minister. In the spring of 2022, when the Board created and charged a Ministerial Search Team, it also specifically allowed that Team to use its judgment in searching for non-traditional structures, such as exploring the option of co-equal senior ministers rather than just one senior minister.

During the past several years, the Board has submitted **bylaws changes** to the Congregation to adapt to this new co-equal structure, prepared in collaboration with the Executive Team **extensive revisions** to its policy **governance framework** to accommodate the structure, gone on **retreat** to discuss it, worked with the Executive Director to draft **contracts** for the interim ministers that would further this structure, and been in **dialogue** with the Executive Team about what is and is not working. A history of this change and its practical impacts is [available](#) on the church website² and the Board continues to work to make this change successful.

² The Development of a Co-Equal Executive Team at All Souls, <https://all-souls.org/wp-content/uploads/2022/04/2022-04-Co-Equal-Executive-Team-v3.pdf>.

Effective Monitoring

Starting in the fall of 2020, the Board **re-committed to monitoring** the church's compliance with its policies. While the Governance Work Group had **recommended** that the Board create a **separate team**, apart from the Board, which would focus on monitoring, part of the work of the Governance Task Force was coming to **understand** that the **Board's core job** in our governance system is fulfilling two critical **monitoring** roles: acting as a **fiduciary** and monitoring the financial health of the church, and monitoring our **compliance** with church **policies** and progress towards Church Goals.

To work towards being an effective monitor, the Board and Executive Team collaborated on a **template for receiving monitoring reports** on church policies and **refreshed** the language of many church **policies**. The Board and Executive Team have also begun to **annually** set a **schedule** for receiving **monitoring reports**, and during the past two years the Board has **received regular, substantive reports** on each of its existing sets of core policies (Staff & Volunteer Treatment, Protection of Assets, Financial Management, and Communication) and a new set of policies (Anti-Racism, Anti-Oppression Commitment). The Board also established a practice of conducting a **survey of staff** each year to check to make sure that staff members think the church is in compliance with its policies on the treatment of staff. This monitoring has revealed many areas of compliance, and some of non-compliance, and the Board and Executive Team have worked together to bring the church towards compliance.

This monitoring has allowed the Board to make sure the church is meeting many of the specific governance recommendations from the Transformation Team's Governance Work Group:

- For instance, the Work Group had recommended that the church set a policy requiring **annual reviews** for all staff members. In fact, there already was such a policy, but the church had not been following it. Monitoring allowed the Board and Executive Team to collaborate to make sure this policy was followed, and the Executive Team has conducted annual performance reviews of staff for the past two years.
- The Work Group also recommended that the church establish a **policy on pay** for staff that tracked UUA salary guidelines. In fact, there already was such a policy, but the church had not been following it in all respects, and the Board had not been receiving compliance reports on this policy. Monitoring allowed the Board and Executive Team to work together to bring salaries closer to where they need to be in order to equitably compensate our staff.

The church's monitoring work is not done. Significantly, now that the church has fresh Church Goals, the **Board must learn how to monitor** the church's **progress towards** those **Goals**, and the Board and Executive Team are in discussion this church year about what qualitative and quantitative data to look at to monitor this progress.

The Board and Executive Team also **must continue** to engage in the **practice of monitoring**. In his 2017 report on governance at All Souls, Rev. David Pyle recommended that we "regularize the monitoring reporting and stick to it unless the need for a change is relatively high." The Board has now worked with the Executive Team to monitor policies for two years, and conducts an annual orientation focused

on monitoring. This regularization has lessened the work of gathering, and sharpened the quality of, monitoring data, but may fall away if not regularly practiced.

Church Goals and Strategic Planning

The Governance Work Group **recommended** that the Board establish a **process** for future **strategic planning**, and determine who is responsible for this planning work.

Following that recommendation, the Board led a major project in Church Year 2021-22 called *Imagining Our Future*. This project involved the voices of approximately 300 congregants, children, and staff members, and the Board gathered over 1,000 pieces of data about those individuals' proudest moments with the church and wishes for the future of the church. Building on that feedback, the Board drafted, and the Congregation overwhelmingly approved, [seven new Church Goals](#).³ These **Church Goals** are one of the **ultimate expressions of Congregant control** over the church: the Congregation sets our focus through Church Goals, which drive our programs, staffing, and budget for a period of approximately five years.

The Board also **established** a **process** for next steps in strategic planning. The **first step** is for the Executive Team to take the broad values in the Church Goals and **"interpret"** what they mean for us spiritually and practically. This church year, the Executive Team is working with staff, the Board, and the Congregation to do just that.

The **second step** in strategic planning will begin in earnest next church year (2023-24). In his book *Governance and Ministry*, Rev. Dan Hotchkiss recommends that a board and executive agree on an annual "vision of ministry" which will guide a church's work for that church year. In his 2018 analysis of All Souls' governance system, Rev. David Pyle recommended the Board consider this book's recommendations for a collaborative system of governance.

The Board agreed in May 2022 to a **governance reform** that implements a version of that annual "vision of ministry" proposed by Rev. Hotchkiss: the Executive Team is now required to submit in September of each year **"an annual plan of priorities, which incorporates voices from across the Church, to pursue Church Goals."** In the past, the church had tried to put together five-year strategic plans, but the new requirement is to have a rolling, annual plan, based upon collaboration and listening to the Congregation. **The church now must learn to live into this new policy**—it was adopted just after the approval of new Church Goals, and the first year to test whether it will work will be Church Year 2023-24.

³ All Souls' Mission and Goals, <https://all-souls.org/about-us/mission-goals/>.

8th Principle Governance Reforms

A large focus of the Board's work has been to try to understand what the 8th Principle means for our governance system, and one of the specific charges of the Governance Task Force was to make recommendations to change that governance system based on the 8th Principle.

During Church Year 2020-21, the Governance Task Force engaged in a year-long project to wrap the 8th Principle into our governance system. That process involved interviews with current and former staff, research into the governance systems of not just other churches but also progressive food co-ops and school boards, and extensive drafts and engagement with the congregation and staff. The result was a large swath of governance reforms that the Board adopted in April 2021.

Those governance reforms included an entirely **new** set of executive limitations **policies** (which are policies that constrain the discretion of the Executive Team and church) focused on our **Anti-Racism, Anti-Oppression Commitment** and that **require**, among other things:

- **monitoring** of how well the 8th Principle is being embedded into all levels of the church;
- orienting staff and volunteers on how to **perform** their **duties** in line with the **8th Principle**;
- assessing **vendors** based upon a matrix of values such as paying fair wages;
- lifespan opportunities for congregants to **develop** anti-racist, anti-oppressive, **multicultural skills**;
- **accessibility guidelines** for both virtual and in-person church programming; and
- **designing church programming** through a consideration of the spiritual needs of congregants who are Black, Brown, Indigenous, Asian Pacific Islander, and people of color.

In June 2022, the Executive Team delivered its first monitoring report on these new policies, revealing both compliance and non-compliance, which is expected as the church learns to live into these newly-defined commitments.

The governance reforms also included an **expansion** of the executive limitations **policies** that govern the **treatment of staff**, such as:

- ensuring that staff have not just **annual performance reviews**, but timely, candid, and constructive **feedback** and **positive reinforcement**;
- providing **mentoring** opportunities for all staff, particularly those who are Black and Brown;
- ensuring the church has a prompt, safe, and effective **conflict resolution** process; and
- **compensation** in line with UUA guidance.

The Board and Executive Team's work on monitoring, discussed above, has allowed the church to move closer to being in line with these policies.

Finally, the governance reforms contained many **policies focused on the Board itself**, both in how it can incorporate the 8th Principle and how it can govern well, including:

- **orientation** on both governance and the use of the **8th Principle**;

- being **honest** about what the Board and Trustees do not know when **navigating issues** regarding **race** and reaching out to experts for advice;
- structuring work to address, eliminate, and prevent actions, decisions, and outcomes that result from and perpetuate racism and other oppressions;
- seeking out, listening to, and valuing **congregational input**;
- planning ahead through the use of an **annual monitoring calendar**; and
- **monitoring the Board itself**—how our performance compares not just to our own policies but to the 8th Principle itself.

The Board has taken steps to live into these reforms, but still has work to do. For instance, the Board has not yet had the chance to figure out how to monitor our own performance against the 8th Principle, a key governance reform.

Transparency

A primary recommendation from the Governance Work Group was that the Board demonstrate “a **firm commitment to transparency** between the Congregation – Board – ministers – Church staff.” Following up on many recommendations from the Governance Work Group to communicate more with the Congregation and report out actions to the Congregation, the Board has taken several steps to improve transparency:

- The Board published comprehensive **Annual Reports** in Church Year 2020-21 and 2021-22. The Board itself and several Board Committees have annual reporting obligations to the Congregation, and these Annual Reports fulfill those obligations—informing the Congregation what we have spent our money on, what our endowment distributions will be, whether the church is in compliance with its policies, what has been happening with Church Goals, etc.
- During the past several years, the Board has had to make several **big decisions** about the future of the church—whether to extend the interim period for a third year, who to place on a Ministerial Search Committee, what should go into Church Goals. In making these decisions, the Board has **extensively engaged** the **Congregation** in the **decision-making** process. For instance, to construct a Ministerial Search Committee, the Board and supporting volunteers placed phone calls or individual emails to every single member of the church to ask them who they thought should be on that Search Committee, and then the Board asked the Congregation to vote on a ballot to advise the Board on the creation of this committee.
- During the past several years, the Board has also considered several large-scale **governance changes**—the 8th Principle governance reforms mentioned above, an ongoing comprehensive review of our bylaws, and the drafting of new Church Goals. With all these changes, the Board has provided **extensive opportunities** for **congregants** to **engage** with them and **provide input** while the changes were still in “draft” form.
- **Minutes** are generally timely approved and published, and the Board **publishes** its **entire “Board packet”** in “the Realm” (a password-protected area of the church website available to church members), except for the slim and occasional amount of material that’s considered in confidential “executive session.” Board members review these packets to prepare for Board meetings, and the packets contain monitoring reports, monthly executive team reports, financial information, and more. While congregants do not often attend Board meetings, they

are welcome to do so, and the Board has fully included **participation from congregants** (e.g., the Search Committee and Membership Secretary) **in meetings** relevant to their interests.

- **Key governance documents**—minutes, the current bylaws, the current policy governance framework, decisional documents about changes to those documents, and more—are available on the public church **website**.

Conclusion

The Board and Executive Team have worked to establish many good practices and policy changes during the past few years, but **governance and accountability work is not done at All Souls**. The past three years have seen rapid changes to the church, which were not anticipated in 2018 and 2019 when the governance groups mentioned above convened and started making recommendations.

In navigating those changes, and in navigating changes to the composition of the executive leadership at All Souls that have come from the presence of three different Senior Ministers, the Board has tried to **stabilize our understanding of what our job is**. That work has taken many shapes, but two overall aspects are important:

- Understanding that **one of the few core elements of the Board’s work is to be the church’s accountability body**, specifically in terms of appropriately holding our executives accountable. That means **trusting them** to make decisions that are theirs and recognizing that they have wide discretion to use their creativity and skill and knowledge to lead the church, but also **requiring** regular, comprehensive **monitoring information** to which a policy governance board is entitled. No other group is positioned as well as the Board to monitor whether the church follows its policies, and the Board must hold tightly to this role.
- Understanding that **we are accountable to the Congregation**, and that we must demonstrate that accountability. When we make big decisions, we need to, as much as possible, have two-way communication with the Congregation prior to those decisions to secure buy-in, and then we must clearly report out on the decisions we have made and the ways we have lived up to the job the Congregation has given us. Much good work has been done on this during the past two years, but it’s too easy to internally mull over a decision, and then make it, and then not take the next step—telling the Congregation about what has happened, and why, and what it means for their lives, and how their input was considered.

Finally, speaking personally, since this report is a collection of individual voices as well as a report on what various groups have accomplished, let me say that the governance work I took part in starting in early 2018 has been one of the highlights of my life. As a member of the Transformation Team, Governance Work Group, Governance Task Force, and Board of Trustees, I have been blessed to find friendship, challenge, and mentorship. The words “governance” and “accountability” are wickedly boring, but what they have meant in practice for me is this: being in conversation with people of wisdom about our shared values. That’s a gift.

Neil Manzullo

*Transformation Team, Young Souls Representative
Governance Work Group and Task Force, Member
Board of Trustees, President*

8TH PRINCIPLE ADVISORY TEAM

With input and consent from both the Transformation Team and the 8th Principle Task Force, the 8th Principle Advisory Team (the 8 Team) was created following a resolution of the Board in November 2021. The Team is **accountable to the Executive Team** but **required to submit reports to the Board** on a regular basis as well. It is intentionally a “**hybrid**” team, with one **staff** person and one **congregant** serving together as **co-chairs**. The co-chairs determined the size and composition of the team, and opted for an even number of eight members as an implicit rejection of the conventional wisdom that groups must have odd numbers to avoid tie votes. The 8 Team met for the first time in September 2022 with the following membership:

1. Bill Rice, Co-Chair, Congregant
2. Claudia Leibler, Congregant
3. Derek Robinson, Congregant
4. James Ploeser, Staff
5. Jen Hayman, Staff
6. Peter Montgomery, Congregant
7. Rev. Rob Keithan, Co-Chair, Staff
8. Sweta Haldar, Congregant

The Board Resolution calls on the team to perform three broad types of work: practical, advisory, and strategic:

- **Practical work** means work that involves steps taken to implement the 8th Principle in the operations of the church, such as coaching and educating lay committee members on how to implement the 8th Principle in their group.
- **Advisory work** means helping the Executive Team, Board, and other groups think about what transformation needs may exist at the church and acting as an honest partner to give advice on that work.
- **Strategic work** means helping church groups and people identify what similar transformation work is going on at the church. This will help avoid overlap and help connect and align groups with similar focuses.

The resolution also specifies that the 8 Team will look to the Transformation Team’s comprehensive road map as a source for ideas about the particulars that they may want to focus on at any given point.

In the coming year, the 8 Team will focus its work in these three arenas:

First, by **building relationships** and **developing capacity** as a Team. As new people working on a new team on emotionally charged issues, developing trust and comfort with each other is critical. Developing capacity also includes reviewing the incredible work done by previous groups, with a particular focus on the Transformation Team’s comprehensive road map.

Second, via the creation of a **Core Curriculum**. One of the **greatest needs** related to implementing the 8th Principle at All Souls, and living out our calling to love and justice generally, is **training**. The challenging task of replacing the oppressive characteristics of white supremacy culture with more liberating values and practices requires ongoing education that is powerful, well-organized, and widely accessible. While All Souls has offered many excellent courses and workshops over the years, they have been offered by many different groups working mostly or entirely independently. **The time has come for All Souls to take a more comprehensive and collaborative approach that encourages consistency and accessibility while reducing duplication.** The end result will be an All Souls Core Curriculum for spiritually grounded, justice-centered, leadership development. It will be offered mostly in a modular format, with different groups in the church taking responsibility for different content areas, so that no single group or ministry is overwhelmed by the burden.

Third, via the **Transformative Justice process**. All Souls is embracing exciting work to incorporate Transformative Justice principles and actions as part of our community life—in committees and groups, gatherings, worship, and more—as we build our Beloved Community. This work comes from the recognition that **our existing church covenant and conflict resolution process need to change in order to better address and handle conflict that includes differences in identity and power.** It is an important way we can deepen our implementation of the 8th Principle in very concrete ways. A "community of practice" is forming that will be part of deep-dive learning and practice sessions (meeting six times from January-March 2023) and will inform how the practices become part of our larger congregational life. In addition to the goal of changing congregational culture, this work specifically intends to lead to an update of the church covenant and new processes for engaging conflict. Three members of the 8 Team will participate in the community of practice in order to learn more and coordinate future actions with the Committee on Right Relations.

The above actions cover the “practical” and “strategic” aspects of the Team’s charge, as the Core Curriculum and Transformative Justice process are (1) about training and concrete skills; and (2) are highly collaborative. The third area of the 8 Team’s work is advisory. The 8 Team will also be responsive to requests from the Board, Executive Team, and/or Search Committee for input or support related to the 8th Principle.

*Rev. Rob Keithan
The 8 Team, Co-Chair*

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ALL SOULS CHURCH'S MULTICULTURAL COMMITMENT: A BRIEF HISTORICAL OVERVIEW

Note: written by Paula Cole Jones, the founding co-chair of the Transformation Team, the following section was a part of the Transformation Team's December 2018 Preliminary Report to the All Souls Congregation.

This year All Souls Church (ASC) finds itself undeniably in need of institutional change. Why we are in need of change can best be understood from a perspective that is wider than the complications that have been experienced in the past year. How far into the church's past should we cast the lens in order to make sense of our current predicaments and opportunities? This is a brief overview of the evolution of one congregation's commitment to build a Beloved Community that is based on multicultural equity. This overview does not delve into the details of any specific minister, rather, it attempts to show that our commitment to racial justice and inclusion has taken work and we take it seriously.

The reach back into the church's history will begin with Rev. A. Powell Davies' arrival at ASC in 1943, but this is not by any means the beginning of the story. We start with Davies for three reasons:

1. The longest living members of the church were here during Rev. Davies' ministry.
2. Davies envisioned All Souls as a multicultural church.
3. The congregation and Davies addressed issues of racial justice and inclusion in concrete ways, "by their actions."

One of the stories that best illustrates this commitment and progressive social justice stance in the church and the Washington, DC community concerns desegregating a long-standing church tenant. The 1954 passage of *Brown vs. the Board of Education* was a turning point in the church's ability to begin removing the structures of legalized racial segregation. An all-white Metropolitan Police Boys Club ("Boys Club") resided in the church building. The new legislation gave Davies and the church the legal authority to insist that the Boys Club integrate or leave the premises. They refused to integrate and left the church. In its place, All Souls, working with the Unitarian Service Committee, established the first integrated Boys Club in the city of Washington, DC. One can find more ASC examples of these early efforts at racial justice and inclusion. People of color began to join/attend the church during Rev. Davies years as the minister because the church was beginning to demonstrate its commitment to Beloved Community.

All Souls continued to address matters of racial justice and to be a place in the city where racially integrated groups met in the next ministry of Rev. Duncan Howlett who began in 1958. Rev. Howlett served as the church fought against poverty and through the riots following Rev. Dr. Martin Luther

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King, Jr.'s assassination in 1968. In his wisdom, Rev. Howlett advised the Board of Trustees that it was time to call an African American minister.

In 1969, the church called Rev. David H. Eaton, a native Washingtonian and the first African American to serve as minister of the church. The church was on the forefront of racial justice and inclusion during Rev. Eaton's ministry. When Rev. Eaton first came to the church, the membership was about 95% white. He worked with the Board to develop and put resources into a five-year plan to become more diverse. In addition to establishing a racially diverse minister's team and staff, there are two important demographic shifts that led to a more balanced, diverse membership. People of color saw the church's relevance to their lives and community and became engaged. Also, some white members of the church left. With the successful expansion of Unitarian Universalist churches near major corridors leading to the City during A. Powell Davies period, many of those who left had [options to go to a church](#) where the dynamics of race were less dominant in church life.⁴

During Rev. Eaton's years, the racial diversity of church membership grew tremendously and fell into the 60-40 range or 50-50 percent white to people of color, who were mostly African American. The demographic shifts also resulted in a true cultural shift in the church, which permanently established the multicultural identity of All Souls.

This background is important to understanding who we are and our commitment to sustaining the church as a multicultural progressive spiritual home. Our expectations for inclusion, ministry, membership and culture at the church are shaped in part by this history. Multicultural ministry takes leaders who are committed to inclusion, who are loving of people and who are self-aware enough to understand their role and the impact of their decisions on the complex dynamics of relationships in diverse communities.

The minister that followed David Eaton, Rev. Dan Aldridge (in 1994), was not as effective a leader in the complex multicultural context of All Souls. He was African American. His ministry ended within four years and with congregants greatly conflicted over what were the key issues and how to address them. In the end, a greater number of members voted to end Rev. Aldridge's ministry than those who voted in his favor. This represented a crisis of leadership. It was a crisis for the church community and many people left the church. It is estimated that 50 or more of those who left were African American. There are many different stories about the reasons that Rev. Aldridge's ministry did not succeed at All Souls. No one story is sufficient to explain the complexities of leadership and community in this multicultural church. All Souls' leaders never did agree to write the story or how we could tell Our-story during this difficult period in the church's history.

To have 50 people of color leave any multicultural church is an undeniable statement that the community and leaders are not equipped to navigate the complex relationships and expectations of a diverse membership. Under the skillful leadership of Rev. David Eaton, the church thrived in its

⁴ Washington Goes Unitarian, https://www.youtube.com/watch?v=HEa_LYHHiK4&ab_channel=CentralEastRegion.

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multiracial ministry. Under Rev. Dan Aldridge, the church was strained to the breaking point. While committed to multiculturalism, the minister and people in the church were not equipped to work through conflict resolution to sustain the membership. The loss in members and in trust resulted in a financial crisis for the church and the remaining members had to begin rebuilding the church's ministry. Much work was done on many fronts as we began to reassemble the infrastructure of the church and the hope of existing members. A pair of consultants were brought in to help the church begin the work of reconciliation. From that work, we began a process of transformation that invited anyone in the church to contribute their ideas on "What issues, concerns or opportunities do you think need to be addressed for All Souls to be a vibrant, multicultural community?" About 70 people participated in each of two sessions. People responded to the question posed above in the first session. About 150 suggestions were submitted. These were compiled into categories that were meaningful to the church culture and brought back in the second session, where people were invited to volunteer to work in groups to address the items in each category. The work groups continued over the year. Each had a representative that met monthly with the overall coordinator to keep each other informed and to keep the process moving forward. By the end of the year, the work groups were brought to a close. A lot of healing had been taking place, as members of the congregation worked together to rebuild programs and to restore trust in our processes.

The work groups were not intended to be a separate infrastructure, only to inform the existing infrastructure on what congregants thought would be important for improving how we worked, learned and worshipped together. Members of the workgroups were invited to join the committees that held their work, thereby imbuing those committees with new energy and deeper purpose. Work groups that had no committees had the opportunity to become new committees or programs in the church. This gave rise to Adult Spiritual Development, Worship Associates and ADORE, to name a few. Each of these programs continue to make significant contributions to the life of the church today.

During this transition period, the church also formed a search committee to find a new senior minister. It is important to note that church leaders were not waiting for someone to come and heal us -- we were doing our work so that a new minister would come into a healthy community. Because issues of "racial equity" are critical in a multiracial community in the United States, and because the All Souls community had lost trust relating to a sense of fairness on racial matters, we brought in the Jubilee training for the Ministerial Search Committee, Board, Nominating Committee, and ADORE. The purpose was to provide leaders involved in the new minister search with an understanding of the historical, systemic structure of racism and power. After the training, the Search Committee revised its message to interested candidates and negotiated with the Board for a commitment to a multiracial ministry team moving forward. We had multiracial ministry teams during Rev. Eaton's and Rev. Aldridge's ministries, but it was not yet a firm policy.

The loss of members following Rev. Aldridge's ministry left the church in a financial situation that could not support two ministers. The commitment to a multicultural ministry team established a promise that the identity of the person receiving the first call as Senior Minister would directly affect the racial

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identity of the Associate Minister. The Associate position would be filled as church membership increased. The Board agreed.

The Search Committee worked with a great deal of integrity to ensure that the congregation would trust the process. They were intentional in expanding the outreach of the search process in hopes of having a diverse pool of ministers from which to call. That meant searching for ministers on two fronts -- the Unitarian Universalist pool of ministers and a wider circle of ministers who were progressive liberals, but not ordained by the UUA. All potential candidates had to show commitment to antiracism and the multicultural church.

In May of 2001, they had found their candidate. Robert Hardies, young, not yet ordained, openly gay and white, had unanimous support from the nine-member Search Committee. In the fall of 2001, Hardies would become Rev. Hardies as he was both ordained and installed as the minister in the same ceremony.

The church grew rapidly with the new minister. We instituted an annual antiracism training with a goal of reaching a tipping point of people who shared an analysis of race and power. This was a strategy to see if we could get a critical mass of members to share an understanding of institutional racism that would change the way that the church behaved. It was hard to reach a tipping point because new people were joining the church at a rate of maybe 80 to 100 per year. This was a good problem to have, but new people coming into the church would need to be equipped to help us sustain an inclusive environment. In addition to having difficulty providing enough training, the majority of new members were by far European American. It was a struggle to keep a multiracial balance.

In a few years, the church was large enough to support a second minister. We searched specifically for a minister of color to fulfill the commitment made with the Board to always have a multiracial ministry team as part of our religious mandate of building the Beloved Community. In 2003, Rev. Shana Lyngood was called by the congregation to serve as the Associate Minister. Rev. Lyngood left after seven years and the church entered another search for an Associate Minister.

Rev. Susan Newman Moore was called as the Associate Minister in 2011. In the two weeks preceding her call, 120 people signed the membership book so that they could be part of what Rev. Hardies called, "an historic occasion." Part of what made Rev. Moore's call to ministry at All Souls historic is that she and Rev. Hardies represented so many aspects of diversity. She was African American, straight, senior in age and liberal Christian. He was European American, gay, younger and Unitarian Universalist. They also differed in terms of their styles, including preaching from the pulpit. Rev. Hardies' ministry played out predominantly from the pulpit, and Rev. Moore's played out predominantly in pastoral care.

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At the December 2017, Annual Meeting, All Souls Church adopted the 8th Principle, as a statement of our commitment to live as fully into the Beloved Community as possible. The Principle states:

We, the member congregations of the Unitarian Universalist Association, covenant to affirm and promote:

journeying toward spiritual wholeness by building a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions.

It was jarring to many in the community in January of this year, 2018, when they learned that Rev. Moore's ministry had ended. Rev. Moore had many connections in the church community. As a called minister, her departure came as a surprise, and it happened with no input from the congregation. Some felt like their minister was taken away. Whatever the details that led to the end of Rev. Moore's ministry, what was communicated with the congregation created a sense of betrayal for many, and raised questions about effective leadership and a lack of fairness in how the situation was handled. People questioned the Board, Rev. Hardies and the UUA representative(s) involved. These questions remain alive today and fueled the need for a robust, comprehensive transformation process.

It has been exactly 20 years since the 1998 termination of Rev. Aldridge, the disappointments in the church community, and loss of members. Once again, the church will have to find its way forward as a multicultural community, like we did years ago. Whatever people may think about Rev. Moore's departure, there is no sense in being stuck in the debates about whether it was about race because it clearly had a racialized impact. This impact must be addressed for the church to regain the integrity of our call to build and be a part of the Beloved Community. The results of this impact must be understood and healed in order for All Souls to be welcoming for all, including members who are waiting to see change and those who have yet to come. We have to learn how to do this. It is not a given that we are where we want to be, just because some diversity is present in the church. The magnitude of the break in community trust is directly connected to the magnitude of the opportunity for change. It is time for us to define how our community shares this ministry. We are a work in process and we will do the learning we need to do, while we work, and worship and live together. Life is the classroom that can teach us how to succeed. So, we begin again in love.

*Paula Cole Jones
Transformation Team, Founding Co-Chair
December 2018*

Appendix 2

COMMITTEE ON TRANSFORMATION: BACKGROUND MOTIONS

This appendix contains (1) the Board-adopted terms of reference for the Transformation Team from April 2018 and (2) the Board's November 2021 motion dissolving the Transformation Team and creating the 8th Principle Advisory Team, whose work is summarized by Rev. Keithan above.

Terms of Reference

In 2017, the congregation affirmed that the Church subscribes to the Eighth Principle: journeying towards spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions. The Board establishes an ad hoc committee called the Transformation Team to advise and assist the Board on potential staffing, accountability, and governance changes with the intention of aligning the institutional framework of the Church with this goal.

The Team is established pursuant to Article VII, Section 1 of the Bylaws that gives the Board authority over the general direction and supervision of Church affairs and Article X, Sections 2 and 3, authorizing the Board to establish Board committees.

Duties

The Team will be responsible for advising the Board of findings related to its work in the following areas:

- Reviewing implications of various systems of staffing, accountability and governance from an 8th principle perspective;
- Evaluating and recommending modifications to the strategic plan;
- Learning about relevant concerns from across the congregation;
- Consulting with experts where advisable and/or recommending experts for consultation with the Board
- Identifying key policies or restructuring alternatives and soliciting input on potential goals and approaches
- Identifying opportunities for healing, transformation, reconciliation
- Collaborating with the CRR to evaluate the need for renewal and/or revision of the Church's Covenant of Right Relations
- Supporting the Board's preparation for relevant meetings including any congregational meeting
- Assisting congregational work groups around identifying and developing opportunities for transformational change
- Preparing a report with recommendations to the Board of Trustees

Appendix 2

Membership

The Team will be composed of nine people, appointed by the Board of Trustees, who are members of the church and have shown a significant engagement in Church life for at least two years. Of those nine, each of the following committees will recommend one candidate: 8th Principle, Leadership, Development and Nominating (LDNC), Religious Education, Adult Spiritual Development (ASD), Silver Souls, and Young Souls. One of the Team members will be a serving trustee who will act as the Board's liaison to the Team. All members of the Team will be voting members. Qualified members will have demonstrated an interest in Church governance and anti-racist principles (will have taken or commit to take Jubilee anti-racism training) and an ability to work with other congregants consistent with the Church's Covenant of Right Relations. Before making final appointments, the Board will consider the diversity of the Team.

The Board of Trustees shall appoint co-chairs, who shall be responsible for calling meetings, coordinating agendas, appointing a member to record minutes, post online, and distribute to members before the next meeting, preparing a set of goals, and assigning tasks.

Team members will serve for two years and may be removed before term expiration by a vote of 7 of the 9 members of the Board of Trustees. With Board approval, committee members may serve for one additional year. The Board will consult with committees before identifying replacements as needed.

Meetings

Minutes will be posted online on a designated Team webpage. A meeting quorum for voting will be 6 members. The Team may adopt rules governing the use of electronic meetings in the conduct of its business, including meetings by teleconference, videoconference, and additional means not specified herein, but may not allow meetings conducted exclusively by email.

Reporting

The Team will report to the Board of Trustees on a monthly basis through the Board-appointed liaison to the Committee. The Board may request, on occasion, that the Team co-chair(s) attend and present at a Board meeting.

Timeline

The Team will be reassessed annually, leading up to annual meeting and it shall be formally dissolved when its purposes have been fulfilled in the opinion of a majority of the Board of Trustees, after considering the recommendation of the Team.

Amendment

These Terms of Reference may be amended by a majority vote of the Board.

*All Souls Board of Trustees
Adopted: April 25, 2018*

Appendix 2

Motion to Dissolve

The Board formally dissolves the Transformation Team. In doing so, the Board will (1) work with the Team to make sure that any important documents from the Team are permanently stored in the church's archives and (2) publish no later than the June 2022⁵ annual meeting a report for the Congregation honoring the Team's work (including the work of its work groups) and leadership.

The Board also asks the Executive Team to create a new team, with these broad outlines:

- *Activities* - The team will perform three broad types of work: practical work; advisory work; and strategic work.
 - Practical work means work that involves steps taken to implement the 8th Principle in the operations of the church, such as coaching and educating lay committee members on how to implement the 8th Principle in their group.
 - Advisory work means helping the Executive Team, Board, and other groups think about what transformation needs may exist at the church and acting as an honest partner to give advice on that work.
 - Strategic work means helping church groups and people identify what similar transformation work is going on at the church. This will help avoid overlap and help connect and align groups with similar focuses.
 - The team will look to the Transformation Team's comprehensive road map as a source for ideas about the particulars that they may want to focus on at any given point.
- *Membership and Leadership*
 - The team will be co-led by a staff person and a lay person. To find the right lay person, staff will advertise for this position instead of just relying on word of mouth/existing connections. The Board does not have a formal role in choosing the leadership of the team.
 - The membership will be chosen by the staff and lay co-leads. The Board does not have a formal role in choosing membership.
- *Mission*
 - The team will develop a short-term set of goals for what they will accomplish this church year. The team will also develop terms of reference that outline their longer-term work.
 - The team will also be a vehicle for the Executive Team to show that they are in compliance with the church's new 8th Principle policies.
- *Who decides what to work on*
 - The staff and lay leaders of the team will decide what their current focus will be.
 - The Board does not have a formal role in making decisions about what particular work should be done. However, the Board should be kept informed of this work through regular reporting.

⁵ Later extended to December 2022.

Appendix 2

- *Accountability*
 - The team will provide the Board with their short-term set of goals for what they want to accomplish this church year, as well as their terms of reference, once developed.
 - Until June 2022, the Board will receive a monthly report on the team's development and progress.
 - The team will provide the Congregation an annual report that updates the Congregation on their work. This report will be due each year for the annual meeting.

*All Souls Board of Trustees
Adopted: November 17, 2021*

TRANSFORMATION TEAM MEMBERSHIP

Transformation Team Co-Chairs

Paula Cole Jones (April 2018-January 2020)

Ken Ambrose (April – August 2018)

Pamela Sparr (October 2018- November 2021)

Derek Robinson (January 2020 – November 2021)

Committee and Group Representatives

Whitney Cooper, Noel Tieszen (8th Principle Task Force)

Danielle Henry, Merrie Dodson (Religious Education)

Erika Landberg, Nada Petrovic, Carol Collins (Adult Spiritual Development)

Neil Manzullo, Zach Morrice and Jeremy Neff (Young Souls)

Derek Robinson, Pamela Spratlen (Leadership Development & Nomination Committee)

Julia Sayles (Silver Souls)

Board of Trustees Liaisons to the Team

John Schuettinger

Nadine Ramos

Libbie Buchele

MJ Crom

Staff Liaison

Rev. Rob Keithan (Fall 2020 – 2021)

Transformation Team Workgroup Leaders

While not official members of the Team, we closely collaborated with three work groups which provided great service to All Souls in advancing key aspects of the healing process and structural change. We would like to thank all their members for their hours of difficult, sensitive, and skillful work and especially acknowledge the thoughtful leadership of their chairs:

Governance and Accountability, Cathy Tortorici

Anti-Racism/Anti-Oppression and Diversity, Tom Loke

Trust & Reconciliation, Kyla Dixon and Peter Montgomery