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## ***Final Report Governance Review Project***

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## **1. Goals of CUC Governance Review**

This governance review was commissioned by the CUC Board of Trustees in February 2011. The review was prompted by six recent resignations by Trustees. The review was intended to achieve the following goals:

- To examine reasons for recent resignations by Board Trustees.
- To identify root causes (systemic deficiencies) that may have prompted the resignations.
- To propose systemic improvements, in order to help CUC:
  - attract effective leaders to serve on the CUC Board;
  - make Board members' involvement satisfying and meaningful;
  - optimize Board members' contribution to the work of the Board;
  - increase the likelihood that elected Board members will serve their full terms;
  - reduce the likelihood of resignations and the resulting stress and disruptions;
  - serve the needs of member congregations effectively.

## **2. Sources of Material for the Review**

While conducting this review, I assembled material from the following sources

- CUC Governing documents: Bylaws, Letters Patent.
- CUC Work Plan, Monitoring Plan, and Policy Manual.
- Exit interviews and phone interviews with six (6) departing Board members.
- Questionnaires and phone interviews with eight (8) Board members (as of March 2011).
- Questionnaires and phone interviews with the Minister Observer and Youth Observer (2).
- Questionnaires and phone interviews with the Executive Director and Senior Staff (4).
- Interviews with four (4) former CUC leaders.
- Listening in on the April 12<sup>th</sup> 2011 Board Conference Call.
- Observing the May 19<sup>th</sup> 2011 Board meeting in Toronto.

## **3. Stated and Implied Reasons for Resignations**

As a result of the exit interviews and phone interviews, I was able to identify the following remediable causes of resignations from the Board:

- Frustration with conflict on the Board and its inability to address it effectively.
- Having relevant input or feedback greeted by defensiveness.
- Having hard questions or unpopular views dismissed without being fully heard.
- Fundamentally disagreeing with some decisions and being unable to accept them, e.g.: deficit budgeting, the Work Plan, the selection of the Executive Director (ED).
- Discomfort and hurt feelings as a result of a leadership style perceived to be too rigid.
- Being overwhelmed by large time demands, stress, and personal tolls.
- Occasionally secretive decision-making and low levels of transparency, e.g.: Some Board leaders gathering privately before and/or after a meeting and all but finalizing decisions.
- A degree of impatience with the substantial focus on the implementation of the Carver Governance model, and a perception by some Board members that this effort diverted the Board away from its mission of *Building Vital Religious Communities in Canada*.
- A degree of impatience with the pace of staff transition after the former Executive Director's resignation, which forced volunteers to assume operational duties for a while.
- A sense of futility in the face of a large and complex task and a divided Board.

The difficulties at the Board level peaked in September 2010. At that time, due to seemingly irreconcilable differences, the former President resigned and a new President was elected. Although some interviewees attributed these developments to the leadership style of the former President (described by some as being somewhat rigid), other interviewees suggested that all Board members were equally responsible, as they neglected to speak up and express concerns about the way decisions were made.

#### **4. Recent Progress on the CUC Board**

After September 2010, the conflict appeared to have subsided. Since that time, the following developments have caused the Board to become increasingly optimistic:

- The February, May and September 2011 Board meetings were collegial and productive and focused largely on CUC's mission of *Building Vital Religious Communities in Canada*. Increasingly, Board discussions have been focused on *big picture* questions and goals.
- At CUC's May 2011 Annual Meeting, the Board made efforts to connect with CUC members. There were opportunities for member input on current issues.
- Just prior to the 2011 Annual Meeting, a group of Board members met with the former CUC President and worked together to heal and reconcile past differences.
- The Board showed an interest in boosting its effectiveness by initiating this review.
- Staff members have been implementing the Work Plan to assist member congregations, and some positive feedback on their efforts has been received.

#### **5. Systemic Deficiencies That Still Threaten CUC**

Notwithstanding the improvements noted in section 4, the Board should not consider itself immune to similar problems in the future. Some of the root causes of past problems may still exist, and they could therefore re-surface and jeopardize future Board efforts, especially when contentious issues arise or when significant Board turnover occurs.

In my opinion, the root causes of past difficulties are systemic issues (not personal ones). It should be noted that some of the systemic weaknesses identified herein appear to have been at least partly addressed since the start of my work, as the Board has been working diligently on improving how it functions. However, the following systemic issues may still exist:

- Conflict avoidance: Conflict has generally been viewed as a bad thing. The Board seems to have little experience in resolving disputes logically and constructively and potentially benefiting from them. In the past, members responded to conflict by ignoring it, or trying to make it go away (by placating or giving in to assertive individuals), or engaging in win-lose arguments, or scaling back their involvement, or, ultimately, resigning.
- Acquiescence and silence: Asking tough questions or challenging a proposal has generally been seen as "not nice" and may therefore be avoided, so as to not hurt people's feelings. Trustees should note that, if they remain silent in the face of damaging dysfunctions, they may end up hurting CUC and its present and future congregations. Trustees must act in a manner that can be trusted, and therefore *silence is not golden in the Boardroom*.
- Remnants of a culture of secrecy: As a consequence of conflict avoidance, there may still be a temptation to have debates and de-facto decision-making away from meetings. This habit can erode transparency and trust, and can resurrect the sense of backroom dealing.

- Insufficient *big picture* thinking: Although CUC's mission of *Building Vital Religious Communities in Canada* is well established, it does not appear to have been referred to as often as needed, nor does it appear to have been used sufficiently to scrutinize arguments or proposals. There should be increased efforts to articulate a vision of a perfect CUC and *magnetic* congregations and on making this vision a reality.
- Informal processes for selecting, orienting, training and mentoring new Trustees: Board members have been, in effect, chosen by the Nominating Committee, and Board officers have been appointed by the Board by informal agreement. Although some selection criteria seem to be in place, comments suggest that at least some nominees did not know what commitment was expected of them before they agreed to serve on the Board. In addition, some interviewees indicated a steep learning curve and challenging technology.
- Lack of training and mentoring for Presidents (and other Officers): Without training, a new President cannot be faulted for perceiving his or her role as that of *doing things* (instead of getting things done through other people). Without mentoring, new officers may have difficulties in building the Board as a team and in dealing with conflict on the Board.
- Substantial time commitments: Board members are expected to attend three face to face meetings (several days each), participate in monthly conference calls, and perform inter-meeting duties. This substantial commitment may overwhelm volunteers and may well become an insurmountable barrier in front of effective leaders (especially young people and working professionals). It may make it unattractive for them to join the CUC Board.
- Absence of regular evaluations: Although some efforts at evaluations are in place, there need to be more regular and thorough evaluations at all levels, i.e., evaluating the Board collectively, each Trustee, the President, the Executive Director, and each CUC program.
- A disconnect between the CUC Board and member congregations: Based on an informal show of hands taken of CUC members at the 2011 AGM, there appeared to have been little knowledge of what the Board was mandated to do to serve member congregations, and what benefits members and the UU movement received. In addition, CUC has yet to build a track record in large scale membership engagement in decision-making.
- Deficit budgeting: On some occasions in recent years, the CUC Board endorsed deficit budgets (which the Council supported). Clearly, deficit budgets are unsustainable. They can be seen as borrowing funds from future generations and as living beyond CUC's means. Although substantial funds were recently required to launch the Work Plan (and hence the need for deficit budgeting), deficit budgeting should stop as soon as possible.
- Some tensions between the Board and the Staff: Although the Carver Governance model contemplates the Board focusing on policy and leaving the day to day operations to the staff, some interviewees were uncomfortable with the amount of leeway given to CUC Management and Staff. Others questioned whether the Work Plan benefits were proportionate to its costs. These tensions can erode trust and confidence in CUC's Staff. They should be addressed expeditiously and in an open and constructive manner.

## **6. Recommendations & Issues to Address**

Clearly, if dysfunctions and risks are to be reduced, the systemic issues identified in section 5 should be addressed. This section offers specific recommendations in various areas.

### **6.1. Mission, Vision and Strategic Planning**

In my view, the Board's most critical roles are vision and leadership. Its actions must be aligned with the mission of *Building Vital Religious Communities in Canada*. It should have regular visioning sessions, describing CUC and its congregations as optimal organizations. With the vision clearly articulated, the Board should set strategic priorities to advance CUC towards this vision (as it has done with the Work Plan). Staff should continue to implement the Work Plan and report to the Board on progress and on measurable *big picture* outcomes.

CUC Board's success should be determined by *what it achieves* (substantive goals) and *how it achieves it* (process goals):

- **Substantive goals (national level):** While advancing its mission of *Building Vital Religious Communities in Canada* on the national level, the Board should ask these questions: How effective is CUC at "connecting the dots" and building a cohesive national organization? How effective is CUC at being a national voice for the UU movement?
- **Substantive goals (local level):** These questions should be raised: How effective is CUC at helping its member congregations become *magnets* for their own members and communities, deliver relevant and exceptional spiritual value, make their congregations cohesive, and govern themselves in an effective and fiscally prudent manner?
- **Process goals:** Substantial national initiatives should be taken in close consultation with member congregations. Before committing to such initiatives, the Board should initiate a national dialogue and invite member congregations to help identify the problems to be solved, assess options for solving them, and participate in choosing the appropriate solutions. *Bottom-up* processes will likely improve decisions and boost support for them.

### **6.2. Metrics & Support for Congregations (Bottom-Up Approach)**

CUC's current Work Plan represents a substantial investment, is now under way, and there is apparently some positive feedback on it. Having acknowledged these points, it is my suggestion that, when undertaking future large scale initiatives, CUC Board seek to involve its member congregations in defining such initiatives, as in the process outlined below:

- A CUC task force, accountable to the Board, would draft metrics by which member congregations could measure their effectiveness. These metrics would cover areas such as congregational governance, membership building and retention, lay leadership, spiritual leadership, staff hiring and supervision, fiscal management, communications, dispute resolution, legal matters, etc.
- The draft metrics document would be distributed to member congregations for input. They would comment on how the document might be changed or customized to better reflect their congregation's realities.
- The metrics document would be revised based on input from member congregations. A congregational assessment questionnaire would then be created. It would be distributed to member congregations, with a request to do the following:
  - Indicate areas of congregational strength.
  - Indicate areas in which help is needed.
  - Offer success stories and tips that can be shared with other congregations.

- CUC would review the returned metrics questionnaires and:
  - Generate an “inventory” of tips and success stories (to be posted on CUC’s web site).
  - Create lists of local/regional contacts and resources for unique advice and expertise.
  - Establish methods to help member congregations overcome challenges.
  - Provide help by staff and possibly also by qualified volunteer resources.
  - Provide help by outside subject matter experts (accountants, lawyers, etc.).
  - Provide advice on spiritual matters through designated staff and/or UUMOC.

### **6.3. Potential Branding for CUC**

Given the variety of religious organizations in Canada, it may be productive to engage in a *branding* process, to identify the overall uniqueness of the Canadian Unitarian/Universalist (UU) movement. This process can identify common UU congregational traits, while respecting the uniqueness of specific congregations. Branding of CUC could offer these benefits:

- Distinguish Canadian UU congregations from those of other religious movements.
- Create a similar feel and look in congregations across Canada.
- Possibly make every Canadian UU congregation feel like home to Canadian UU visitors.

### **6.4. Board’s Relationship with CUC Members**

Based on feedback from interviewees and CUC members, the CUC Board should become more visible and accessible to CUC members, while remaining *hands-off* from operational aspects of the organization (to be handled by CUC staff). I recommend that the Board:

- Establish CUC’s value to the member congregations (see section 6.2).
- Build a sense of community nationally by communicating often and by diverse methods.
- Communicate proactively, especially in tough times (rather than *run for cover*).
- Convey honest and humble messages: “*Things are tough. Here is what we’re doing \_.*”
- Solicit member congregations’ support and advice on addressing tough national issues.
- Recognize and amplify the benefits of an AGM: promoting transparency and accountability, soliciting input from members, building national unity, and electing new leaders.
- Have each Trustee make a short presentation to AGM delegates or take a lead role.
- Seek endorsement of significant Board proposals, e.g.: annual budget’s main thrusts and *bottom-line* (without assessing each line-item and each sub-line-item).

### **6.5. Carver Model (Policy Governance)**

By all accounts, large amounts of time and efforts were invested in implementing the Carver Policy Governance for CUC. The Carver model offers several benefits (i.e.: focusing the Board on policy, vision, and leadership to the members, while taking the Board away from day-to-day operational details). However, some Trustees had concerns about it:

- The model employs terminology that seems more appropriate to profit making corporations than to member driven cooperatives, with a spiritual, rather than money-making focus.
- The model can, in effect, prevent much needed Board-Staff collaboration, as the underlying premise is: “*The Board has only one employee: the Executive Director (ED).*”
- The model may have the effect of stifling Board members, who might be afraid to “cross the line” and talk about staff matters and policy implementation issues (ED’s jurisdiction).
- The model assumes a two-tier leadership (Board as a policy making body, and staff as an implementing body), when CUC may need a third tier: spiritual leadership.

In light of the above concerns, I propose that the Board:

- Implement the Carver model in a pragmatic manner, whereby the Board establishes a vision and strategic priorities for CUC and focuses on the *what* and the *why*. The ED would focus on the *how* and report regularly on the implementation of the Board's directives, budgets, and congregational feedback. As the Carver model is finalized, the Board should resume its primary focus on high-level vision-driven discussions.
- Allow Trustees to participate freely in meetings and raise valid concerns without fear of offending the Carver model by addressing staff issues. Incidents of *crossing the line* should still be addressed, but by a meeting evaluator ("Carver cop"), just before the meeting is adjourned. This way, the Carver model would become only a tool and a means to an end, and would be less likely to become a distraction.
- Possibly delegate the task of monitoring the ED's performance to the Officers, so they can bring well considered observations and recommendations to the Board for efficient decision-making. It should be noted that Board meetings are very costly, and therefore meeting time should be primarily dedicated to the advancement of CUC's mission, and less to discussions about the adherence (or lack thereof) to Carver. Put differently, the Board should spend the bulk of its time "*on the balcony*," and less "*on the ground floor*."

#### **6.6. More on the Board's Relationship with the Staff**

Further to my comments on the Carver model (section 6.5), I observed some tensions between the Board and the Staff. A degree of tension is healthy and necessary, but too much of it can erode staff productivity. I recommend the following measures:

- The Board should establish clear high level expectations of the impacts of the Work Plan on CUC's member congregations. The Board should demand that staff deliver excellent results, and that they function as a cohesive, well coordinated and accountable team.
- The Board should give clear, reasonable and reliable directions to staff, via the ED. The Board should formalize ED directives by motions, so the ED is directed collectively by the Board, and not by individual Trustees, especially when significant directives are given.
- The Board should establish how much authority and power the President and the Officers have between meetings, and to what extent they can direct the ED and the Staff. The Board should also establish a protocol on how Trustees should deal with congregational feedback or complaints about CUC staff (i.e.: forward them to the President and/or ED).
- The Board should formally evaluate the ED (at least annually), as well as give the ED ad-hoc feedback (positive and corrective) on specific issues as they arise.
- It may be beneficial to provide some external coaching and mentoring for the ED and/or some staff members, to assist them with leadership, dispute resolution, and goal setting.
- There should be regular and ad-hoc dialogues between the Board and the ED and staff. In such dialogues, both sides would share candid feedback on what works and what doesn't work in the Board-Staff relationship. Kudos and complaints should be shared, rather than being saved for post-meeting conversations. The notion, held by everyone, should be: *We welcome your complaints with the same enthusiasm that we welcome compliments.*

## 6.7. Board Member & Officer Selection, Orientation, Mentoring, Evaluation

Several conditions that prompted Trustee resignations can be addressed by strengthening the Trustee and Officer selection, orientation, mentoring and evaluation processes.

### 6.7.1 Selection of Board Members and Officers

Based on interviews and written questionnaires, Trustees are, in effect, selected by the Nominating Committee and confirmed (by acclamation) at the ensuing AGM. The CUC President and other officers are selected by the Board by informal agreement.

Although some of the individuals I interviewed expressed a preference for a competitive process and possibly contested elections, I am not convinced that such a move would, by itself, address the systemic issues that I raised. Over the years of my practice, I have seen contested elections deliver less than optimal results, e.g.: nominees with low commitment levels or poor people skills being elected because of a passionate AGM speech.

Here is the process that I propose for selecting Trustees and Board Officers (some of the ingredients below may already be in place):

- Establish desired traits of candidates: knowledge, skills, attitude, track record.
- Establish desired Board composition (age, race, and gender balance, etc.).
- Prepare full definitions of roles, responsibilities and required commitment for all positions.
- Emphasize the President's duty to lead, build leaders, and build the Board as a team.
- Emphasize the President's role as a facilitator of shared decision-making.
- Seek candidates who match the ideal candidate profile.
- Allow for nominations by the Nominating Committee and by members, as per the Bylaws.
- Explain roles and required commitments to candidates before they agree to be nominated.

### 6.7.2 Orientation and Mentoring

Subsequent to the selection process, elected Trustees and Officers should be given a full orientation. The process I recommend is as follows:

- Schedule a one day orientation program once a year, with mandatory attendance by all, including continuing members, so all are parties to the discussion and a team is formed.
- Include substantive and procedural topics on the orientation's agenda. **Substantive topics:** mission, vision, current strategic priorities. **Procedural topics:** Roles of Trustees and Officers, rules for meetings (consensus versus majority, duty to speak up, conflicts of interests, supremacy of collective interests over narrow ones), duties between meetings (e.g., confidentiality), commitments during and between meetings.
- Establish, unequivocally, that the decision-making process is co-owned. Everyone must understand the process, respect it, and be prepared to defend it when needed. Establish that silence and acquiescence are just as bad as harsh and angry words.
- Prepare a *cheat sheet* or cue cards (more specific than the ones the Board uses currently) for meeting participants, to make it easy for them to bring attention to a problem. Large font scripts may include: "Order" "Time?" "On-topic?" "Tone" "Decorum" "Break?"
- Provide special training for the President as to the duty to lead, build the Board as a team, promote democracy and transparency, and mentor and empower other leaders.

- Consider a *Board Member's Buddy* and a *President's Mentor* system, whereby experienced individuals or professionals provide support to elected leaders.
- Cultivate a culture of excellence, collectivity, learning, and intolerance of dysfunctions.

### **6.7.3 Evaluations & Ad-hoc Feedback (Board Level)**

The orientation process is important, but, by itself, may not be sufficient to maintain Board health. Challenging and controversial issues may arise and cause Trustees to forget what they learned. As an added measure, evaluations and feedback must be used on a regular basis, to raise Trustee awareness, and to detect and deal with dysfunctions at an early stage.

My specific recommendations are as follows (some have already been implemented):

- Schedule an evaluation of the Board as a whole at least once a year.
- Have each Board meeting evaluated just before adjournment. The evaluation can either be done by a Trustee designated as a meeting evaluator, or by the Board as a whole.
- Have each Board member evaluate her/his own participation at the end of every meeting against a set of objective criteria.

Regular evaluations should not preclude immediate feedback on problematic behaviours. Such feedback should be given when the behaviour occurs or shortly thereafter and should not be delayed until a formal evaluation takes place. Ad-hoc feedback should identify the problematic behaviour, the negative impact it is having, and preferred alternative behaviours.

To sum up, regular evaluations and ad-hoc feedback (delivered honestly, constructively, and without delay) are critical components of the Board's decision-making processes. Without them, the damaging effects of minor imperfections and irritants can accumulate or escalate. Evaluations and feedback are CUC's best defense and immune system against the possibility of a repeat of the difficulties that it encountered in the past.

As CUC's leaders, Trustees should learn to treat feedback as **a gift**, welcome it from others, and make their own feedback easy for others to receive. Declining to give valuable feedback is like cheating others of a significant gift that they deserve and could benefit from.

### **6.8. Dispute Resolution**

Notwithstanding the seemingly positive functioning of the CUC Board now, significant differences of opinion will undoubtedly arise. Conflict and diversity of opinions are natural and positive. If handled properly, conflict can enrich the Board, enhance the quality of Board decisions, and make the Board a cohesive and effective decision-making team.

As stated earlier in this report, the ineffective responses to conflict by Trustees have been to ignore it, yield to vocal and assertive members or leaders, enter into intense and negative "win-lose" arguments (with decisions being guided by intensity and persistence, rather than by wisdom and knowledge), or, ultimately, to resign.

To address conflict constructively and benefit from it, I recommend that the Board and each Trustee resolve to do the following:

- Accept that conflict is normal and beneficial (diversity of opinions can be enriching).
- Learn to talk about *the elephant in the room* (practice and role plays may help).
- Use objective criteria to assess the relevance of one perspective versus another.
- Call for a recess when disengagement and a breather might help.
- Learn to “attack” issues and process flaws without attacking people.
- Learn to manage one’s hot buttons and not take things personally (develop “a thick skin”).
- Use active listening skills (open-ended questions, acknowledgement, validation, summary).
- Arrange training programs on dispute resolution, negotiation, and mediation. It may be best to have such programs led by professionals, with Board and Staff leaders attending.
- Use mediation when needed (depending on the readiness of all parties).
- Prevent disputes or make them more manageable, by building trust and transparency, and by sharing perspectives openly.
- Abandon premature judgments and instant dismissal of ideas.
- When encountering a tough issue, use methodical problem solving, i.e.,
  1. Start by defining the problem, its impact and root causes.
  2. Explore objective criteria by which to measure any proposed solutions.
  3. Brainstorm for options.
  4. Assess the options based on the objective criteria that were established in step 2.
  5. Select the best option (which may combine more than one option).
  6. Decide on implementation.

### **6.9. Board Meetings**

As I commented after observing two Board meetings (April 12 conference call and May 19 face to face meeting in Toronto), the meetings were generally run well. Trustees were given opportunities to speak and to influence decision-making. Time was well managed (working with a timed agenda) and the pace was generally dynamic and engaging. Several Trustees asked *big picture* questions, e.g., the extent to which some initiatives advanced CUC’s mission of *Building Vital Religious Communities in Canada*. Some Trustees acted as effective fiduciaries by asking questions about setting priorities and about the use of resources (time and money) to optimize the delivery of CUC’s mandate.

Having made these observations, I have the following concerns:

- Several Board members spoke more often, while others were mostly quiet, especially when contentious issues were discussed. These dynamics can make it awkward for those who raise questions, as they may not want to be perceived as dominating the discussion. Trustees should personally resolve to speak more often in meetings, especially when their insights could enhance the discussion and make it more balanced.
- On several occasions motions were phrased *on-the-fly*, thereby increasing the likelihood that important points might have been missed. The housekeeping amendments made the process tedious and possibly frustrating for some. The better options would be to:
  1. Pre-write motions before the meeting, if possible.
  2. Take a short break to give proponents an opportunity to craft a precise motion.
  3. Possibly authorize the President to make housekeeping changes to motions after the meeting without affecting the intent in any way.
- Portions of the meetings were slow. I suggest that the Chair pick up the pace. In my estimation, the two hour conference call could have been concluded in one hour. With better time management, the May 19<sup>th</sup> face to face meeting could have given more coverage to significant issues (some of which were postponed).

- When it came to voting, there was duplication in the process, whereby consensus was clarified, and then a motion was invited to formalize a decision. This process can be simplified, by the Chair stating the consensus, checking if any “red cards” were being raised, and – if not - taking a show of hands to finalize the decision.
- I suggest that the Board consider a policy that names of movers and seconders are not recorded in the minutes (thereby focusing on the Board’s collective actions and not on individual actions).
- The Board should address time commitment issues and possibly consider shorter meetings, so meeting frequency and duration do not become barriers to well qualified individuals who cannot afford to take substantial time off work.
- Socializing among Board members before or after a meeting is natural and positive. If at all possible, there should be social gatherings that involve the entire Board, so as to avoid the formation of cliques and factions. In addition, socializing should not result in decisions being finalized or votes being committed before a meeting, as such an approach will erode trust and diminish transparency. Trustees must act in a manner that can be trusted, and coming to meetings with closed minds would be inconsistent with this principle.
- In order to facilitate broader engagement (especially in teleconference calls), the Chair should keep a list of Trustees who spoke on an issue, and then solicit the views of those who have not spoken on it. In addition, there should be a consistent speaking protocol in conference calls, whereby members identify themselves and wait for permission to speak.

#### **6.10. Miscellaneous Issues**

In response to additional issues that were raised in the completed questionnaires and the interviews I conducted, I have the following recommendations:

- Minutes of Board meetings should be taken by a staff person or a professional minute taker, so the Trustee who is elected to be Secretary can fully participate in discussions.
- The roles of Minister and Youth observers should be more clearly defined, and they should be depended upon for their unique input whenever needed.
- CUC should build its relationships with significant stakeholder organizations, such as the Unitarian Universalist Ministers of Canada (UUMOC), Unitarian Universalist Association (UUA), as well as non UU organizations. Such relationships can help CUC address the needs of its members and the Canadian UU movement more fully.
- CUC and its member congregations should consider succession planning, both on the membership level and on the leadership levels. According to my interviews, the number of young people in UU congregations and in leadership is relatively small. CUC should make itself more relevant to young people, or it may work itself out of existence.
- CUC should consider the fact that the number of congregations (about 50) and cumulative size of their membership (5000) has been stagnant for a while.

## **7. Closing Comments**

I found the CUC Board review assignment to be interesting and educational. The leaders I met and spoke to had very positive things to say about the UU movement and about the privilege of belonging to a spiritually diverse, multifaceted and enriching organization. Notwithstanding the negative events that led to this review, CUC appears to be a very positive and highly relevant organization.

Throughout this assignment and in this report, I made concerted efforts to avoid personal blame and, instead, focus my attention on the decision-making system and processes. I firmly believe that the systemic enhancements proposed in this document, if implemented, will help the CUC Board function as a cohesive and effective decision-making body, and help CUC deliver stellar value to its member congregations, their individual members, the UU movement, and Canadian society.

Thank you very much for the opportunity to provide service to the Canadian Unitarian Council.

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