

**Board Retreat Summary**  
**Unitarian Universalist Fellowship of San Dieguito April**  
**6-7, 2024**

To: The Unitarian Universalist Fellowship of San Dieguito Board of Trustees Rev.  
Ellie Kilpatrick

From: D. Ohlandt, Unity Consulting <profohlandt@gmail.com>

Thank you for allowing me to be a part of your board retreat April 6-7. It was a privilege to help you work through the data you collected through your Appreciative Inquiry sessions and your AI-influenced worship service, and to facilitate as you worked to discern and articulate UUFSD's core values, mission, and ends statements based on what you heard from your congregation. This document includes the list of values, the mission statement, and the ends that you developed during the retreat, as well as commentary about how you arrived at particular words and phrases and other points that came up that seemed important. I've also included some things to consider as you make a plan to bring these ideas out to your congregation. I'm very excited to see what emerges as UUFSD begins to live into this work.

**Core Values**

Love Connection Purpose  
Transformation

**Mission**

We are a community rooted in love, acting with purpose and inspired to transform ourselves and the world.

**Ends**

We the members and friends of UUFSD honor our past, celebrate our present, and look to our future by affirming this covenant to:

- ground our actions in purpose and gratitude
- foster fellowship with and in nature
- offer opportunities for moral and spiritual exploration and growth for everyone
- care for the spiritual, emotional, and physical needs of congregants and friends
- model and promote transparency and openness in decision-making, communication, and relationships
- prioritize the needs and nourishment of families, children, and youth
- cultivate learning from interaction across ages, cultures, and backgrounds
- encourage and enact change that dismantles oppression and builds positive relationships
- drive positive change through participation in social action and justice programs, locally, nationally, and internationally

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## Lead-up to This Retreat

In the lead-up to this retreat, you were looking for a process that would help you articulate a “vision” or mission to bring focus and intention to the work of UUFSD. Your contracted minister, Rev. Ellie, was supportive of this idea, and other ministers before her had also encouraged the fellowship to write a mission statement. It had been about 15 years since the last time the Fellowship had undergone a visioning process, and the years since then had seen the departure of several ministers– settled, interim, and contracted– and some turnover in the membership of the congregation. Additionally, UUFSD was well into the first stages of a capital campaign, the main focus of which was to fund deferred maintenance and improvements to the amphitheater space of your indoor-outdoor campus. Your board president had worked with Laura Park at Unity Consulting at one of her previous UU churches, and she recommended the Nested Bowls process.

Your inquiries to Unity Consulting indicated that you were primarily interested in the Nested Bowls process, and that you felt that you and Rev. Ellie were prepared to facilitate the initial Appreciative Inquiry conversations centered on the idea of people’s experience of the holy.

Following two small group sessions and a worship service facilitated by Rev. Ellie, with board members listening, some of you compiled an initial list of values and specific ideas that you heard from these conversations. This list included at least 140 “items” and is included as an appendix to this report.

At the time of our Nested Bowls retreat, the board expressed an interest in moving closer to a policy-based governance approach and away from their history of committee-based governance, though they also emphasized that their primary goal at this time was to articulate a mission and ends.

Throughout the retreat we discussed examples of how the mission and ends they were considering would be used in a policy-based governance context, with particular emphasis on how the board and the minister as executive might structure their relationship to be collaborative rather than antagonistic.



At the start of the retreat on Saturday, we reviewed the metaphor of the Nested Bowls, although the board had already read Laura Park’s book and considered the Nested Bowls metaphor individually and as a group. I suggested that you might envision the bowls with some flexibility to them, to bend and push as the fellowship grows and evolves. I then introduced the idea that inside the innermost bowl, the “ends” bowl, were glass beads that represented all the operational and programmatic things that UUFSD does and could do. Both of these were helpful elements in building our metaphor of how the Nested Bowls relates to the actual

values, mission, ends, and operations of the fellowship. The vision you hoped to cast for UUFSD is the mission bowl, nested in the core values of your congregation. The everyday programs, staffing choices, and operations of the church— the "beads" we called them, after the glass beads that held up the candle—are supported and limited by the bowl that contains them, the "ends" bowl. If you push on the outer bowls— the values or the mission— then the ends bowl also changes shape and the "beads" are moved in turn.

## Values Process

Faced with your list of more than 140 ideas that you had heard the members of the fellowship say during the AI sessions and the AI worship service facilitated by Rev. Ellie, we began with some structured conversations to help you distill what you had heard down to a list of a manageable size.

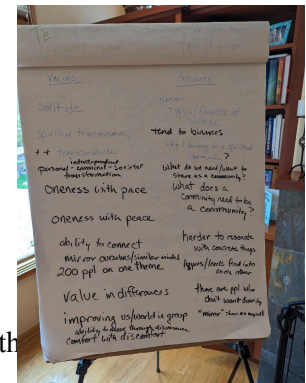
For each “round” of conversation, I asked you to choose a partner and to consider your answer to two questions, then to share your answers with your partner. I invited each pair to share their answers with the larger group after a while, and I kept a running list of values that came up in your discussions and insights that you reached individually or together. Five of your seven board members participated in this part of the retreat, and Rev. Ellie joined as a participant as well.

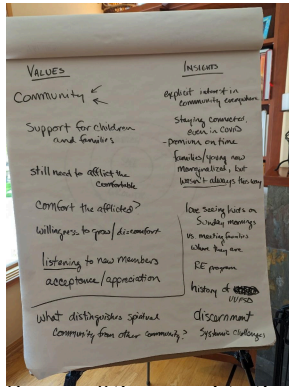
The first set of questions I asked were these:

- 1) choose one thing from the list that resonates strongly with you or that you feel is one of the most important ideas to keep, and
- 2) choose one thing from the list that does not resonate with you or that you find to be a challenging idea or at odds with your personal opinions.

Some of the ideas that came to the surface from this part of the discussion were:

- you found it more difficult to resonate with specific, concrete ideas than with concepts
- you noticed a tendency in the fellowship members and sometimes in yourselves to frame things as binaries (sameness-diversity, or solitude-togetherness)
- you expressed some discomfort with what you heard in some of the sessions as an idea that the fellowship should be a place for “like-minded” people or people who “mirror” each other
- you considered that ideas like “solitude,” “like-mindedness,” “mirroring,” and “oneness” might have different meanings in different contexts, and that your initial reactions to these concepts might be a response to just one of those meanings
- two ideas came up right away that would continue to reappear throughout the discussion: the question of *what makes a community a community*, and the idea of *transformation on multiple levels (personal-communal-societal)*





For the second set of questions, I invited you to work with a different partner and we repeated the process. The second questions I asked were these:

- 1) identify one thing from the list that seems to come up a lot or more often than other ideas
- 2) identify one thing from the list that maybe doesn't come up very often (or at all) but that you feel shouldn't be overlooked

Some of the insights that came up in this discussion were:

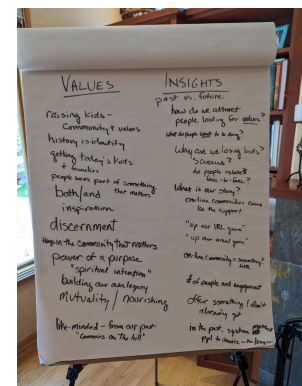
- the idea of “community” seemed to run through almost all the feedback that you heard from your fellowship
- interest in increasing the participation of and support for young families and children was a strong interest of your board and your fellowship
- the passionate discussion of families and young children raised for you the question of *UUFSD’s history and how it connects to your present*; specifically, several board members described the experience of themselves being families with young children when they joined UUFSD and how that aspect was both important to you and also did not seem to be a central part of your Fellowship anymore
- the question of *what distinguishes a spiritual community from another kind of community* emerged in this conversation

For the third set of questions, I again invited you to find a new partner and then we repeated the process a final time. These questions were:

- 1) choose one thing on the list (or from our discussion so far) that is important to UUFSD’s history
- 2) choose one thing on the list (or from our discussion so far) that UUFSD aspires to, or is or should be important to UUFSD’s future

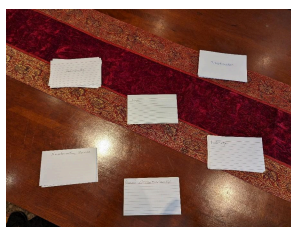
Some of the issues that you considered in this discussion included:

- engagement of both existing and potential members (although you were some way into the discussion before you came to the idea of “engagement” specifically) as a key to and measure of community
- a sense of purpose is important to engage people both individually and collectively
- on-line or virtual experiences– and their relationship to in-person experiences– was a kind of “growing edge” for some of the members of the board, although the reality of these kinds of experiences is important in engaging youth and young adults and more generally in a post-COVID world



At this point, I asked you to reflect on the list you started with and on your discussions so far. I gave each person five index cards and directed you to decide on no more than five “core values” of one or, if necessary, two words each. The index cards were placed on the coffee table in the center of the group, and then we began the “Values Buffet” exercise. Everyone was to read all the index cards and place any that were *identical* into a single stack. Once that was done, you could start to combine any cards/stacks that were *similar*, and finally any cards/stacks that *belonged together* under an overarching value. At any point, a member of the group could move or change a stack that someone else had proposed, which led to various discussions among the group as you came to consensus. The six “stacks” that you eventually settled on were something like this:

<b>community</b>	<b>love</b>	<b>transformation</b>	<b>transformative</b>
-interdependence		-transcendence/ transformation	<b>service</b>
-welcoming/			- egalitarianism
evolving	<b>inclusivity</b>	-growth/	- service
-welcoming community	-children -RE		transformation
-mutual nourishment	-supporting younger generations	-interdependent transformation	-spiritual wholeness
- connection		-inspiration	<b>intentionality</b>
-creating joy			- intention
			- co
			nscious
			intentionali
			ty



From these six stacks, I asked you to use a pen or marker to mark your own personal “top three.” Once everyone had marked their choices, you looked at the ones with the most marks on them and considered the ones with the least number of marks. I had given you the goal of distilling down to three or four “core values” from the six stacks. In the



lively discussion that came from this process, you decided to do some additional combining of stacks and changing the words on the top cards. Transformation and Love emerged first as two of the core values you agreed on, and you were close to choosing a word for two more. You spent a lot of time considering “intentionality” or “purpose,” agreeing that you liked the idea of being purposeful or acting with intention but none of those words or phrases quite captured what you wanted to say.

After a while, one of you proposed these four words in this sequence:

**Love → Connection → Purpose → Transformation**

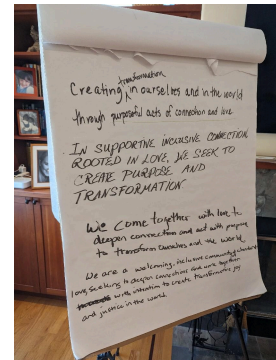
with the explanation that Love leads to Connection, which leads to Purpose, which leads to Transformation. Almost immediately, everyone felt like this was the right set of core values for UUFSD.

## Mission Process

After a break for lunch, we came back together and I asked you how you were feeling about the core values that you had selected. Everyone was still feeling good about the decisions you had made. We began to work on a mission statement for UUFSD, one that was consistent with best practices in mission statements— something simple enough that a six-year-old could memorize and repeat it, and something that reflected UUFSD’s unique character.

I invited you to find another partner and to work together to draft a mission statement centered on the core values that you had articulated and which were clearly visible in the room. You brought four draft statements back to the group, and I asked everyone to identify those phrases or sections of all four of them that resonated with you. The phrases from these drafts that got the most response included:

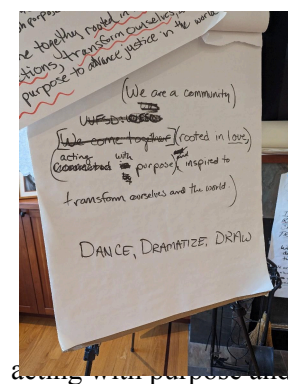
- “rooted in love”
- “act with purpose”
- “we come together”
- “deepen connections”
- “transform ourselves and others”
- “transformative joy”
- “inclusive connections”
- “purposeful acts of connection and love”
- “justice in the world”



I asked you to match these particular phrases to the core values you had identified and then consider these phrases with that in mind, balancing the attention in the statement on your four core values. The group fairly quickly came to consensus on these phrases, and two of these three phrases would end up in your final version with no further editing:

- “rooted in love” (LOVE)
- “we come together” (CONNECTION)
- “transform ourselves and the world” (TRANSFORMATION)

Agreeing on a phrase in your mission that would reflect on the core value of “purpose,” however, was more difficult. After some discussion, I sent you back to work with a new



partner to attempt new drafts. This time the four drafted statements were much closer to one another and you discussed the various approaches each statement took to the concept of purpose. Many of you expressed a deep concern with how the statements “sounded,” which ones felt poetic or rhythmic to say or to hear, and much of the final stages of your discussion consisted of playing with word choice and grammatical structure to find the best expression of the values that fit the musicality of the statement. The next day, one of the first things you asked before we began to work on drafting your ends was to hear out loud the version you settled on— “We are a community rooted in love, inspired to transform ourselves and the world.”

## Ends Process

Before we all left on Saturday evening, I gave you an assignment for our Sunday afternoon session. I asked you to imagine the year 2030 and to draw, dance, or dramatize something you envisioned UUFSD doing at that time, and I invited you to map these visions onto specific clauses of the mission statement that you had settled upon.

I attended your Sunday service in your beautiful outdoor amphitheater, and then we met Sunday afternoon on the UUFSD campus. One of your board members who had been unable to attend the Saturday retreat was able to join us for Sunday, and we began by asking for their opinion on the core values and mission statement. They were positive about it and agreed with your “day after” opinion that they were still the right words for UUFSD.

We began by sharing your “draw, dance, dramatize” experiences. Most of you chose to describe what you had done rather than show something you had brought in, but your descriptions were vibrant and detailed. At least one person shared a movement presentation and commented that “it was awkward, but that’s okay– transformation is awkward.” These creative and insightful projects positioned you well to articulate your ends.

Some of the themes that were present in many of these visions of UUFSD in 2030 included:

- activities and action outside, in nature
- picnic-type social events involving everyone in the Fellowship
- ways to get to know each other besides religious/spiritual beliefs
- collective action in the community with other service organizations and interfaith cooperation



At this point, you were ready to begin writing your ends statements. In pairs, you were assigned two of the four phrases of your mission statement and asked to draft 2-3 ends statements for each phrase, considering what impact UUFSD should have for whom, within, among, and beyond your Fellowship. Once these were drafted, you brought them back to the whole group, and as a group you considered the draft ends under each of the four phrases.

I took notes on your discussion and then drafted a starter set of fourteen impact statements for you to consider. As a whole group, you reviewed and edited the draft impact statements into their current form, a set of nine with an introductory phrase. Some of them were incorporated into the introductory phrase, a few were discarded, and most of them were rewritten in one way or another.

A few notes that arose from the discussions around your ends statements:

*We the members and friends of UUFSD honor our past, celebrate our present, and look to our future by affirming this covenant to:*

Your introductory phrase was one of the final pieces of the ends statements that you put together, and you wanted it to include not only a statement of identity but a declaration of what the whole statement of values/mission/ends had been rooted in. You took one of the draft Ends that was related to “celebration” and adapted it for inclusion here. It was also important to some of you that the idea of “covenant” be included somewhere in the ends.

As had happened the previous day with your consensus on the core values, you were intentional and explicit about the order in which the ends ended up in the following list. You noted a kind of movement from the start to the end, with some causal links—culminating with the idea of dismantling oppression and participating in social action and justice as a means to transform the world. I interpreted this emphasis as a belief that the work of UUFSD begins in purposeful action and fellowship with nature, which in turn create space for growth and mutual care, which shape the kind of open, transparent, responsive community you want to be, which then empowers you to go out and change the world according to your values.

*– ground our actions in purpose and gratitude*

Intentionality and purposeful action ran through many of your discussions and insights during the retreat. When you drafted possible ends statements for the “acting with purpose” clause in your mission statement, most of the ideas that came to the surface were closer to “beads” (the term you were using to differentiate operational and logistical concepts from the more visionary ends, named after the glass beads that sit in the ends bowl of the Nested Bowls image) than they were to ends. For example, “creating intergenerational activities” and “all- fellowship events” described specific programs rather than pointing to the results you hoped they would generate. You added “gratitude” to this broader statement about purposeful action to suggest the kind of positive attitude you wanted the Fellowship to nurture.

*– foster fellowship with and in nature*

One of the interesting things that I reflected back to you was that almost all of your “draw, dance, dramatize” visions included some element of being in nature, yet the initial set of ends that you drafted in pairs did not include any explicit mention of UUFSD’s relationship to the natural world. One of you proposed an early version of this end statement fairly quickly and it was soon settled into its final version.

*– offer opportunities for moral and spiritual e/ploration and growth for everyone*

This end grew out of the phrase in your mission statement to “transform ourselves.” Including “for everyone” was important to you because it clarified that an RE program for children and youth should not be the limit of this end.

– *care for the spiritual, emotional, and physical needs of congregants and friends*

You were clear that this end was not meant to refer primarily to Pastoral Care as delivered by the pastor, but that it was meant to describe all the kinds of mutual care that members of the Fellowship could provide one another, both ongoing and during a crisis. You considered several other ways to word it in an attempt to be more explicit about this, but in the end you decided that the active verb phrase “care for” was more important to you than naming who might “provide care.”

– *model and promote transparency and openness in decision-making, communication, and relationships*

Your interest in naming transparency in decision-making explicitly had come up early in the process, even during the discussion of core values. When you drafted your first ends, though, it had faded into the background. As you considered the list as a whole, you wanted to return this idea to the forefront. Finding an active verb for this idea proved a bit of a challenge, until someone suggested “model” and that felt right to many of you.

– *prioritize the needs and nourishment of families, children, and youth*

This end was rooted in an idea that had been at the forefront of your discussions throughout the retreat. For a while it sat at the top of the list of ends, but there was some concern that placing it first in the list might put off people who did not have children or youth in their families. Although this concern remained, you agreed that the nurture of young families and young people was at the present time a challenge for UUFSD, and one that you and the Fellowship wished to address intentionally.

– *cultivate learning from interaction across ages, cultures, and backgrounds*

This end also reflected an important priority among the board members involved in this process. You were clear that it was the *interaction across* the various identities that you wanted to call out, and that it was important enough to separate from another end statement about supporting families, children, and youth and also from the end statement about exploration and growth.

– *encourage and enact change that dismantles oppression and builds positive relationships*

The character of your relationships within and among UUFSD was such an important part of your vision for your Fellowship. I found the connection in this end between dismantling oppression and building positive relationships to be an especially elegant reflection of why relationships were so important to you. You considered being more specific about the kinds of oppression you hoped to dismantle—white supremacy in particular—but some of your conversations highlighted the idea that many of the “old” oppressive systems, such as misogyny and the patriarchy, were still in need of dismantling as well.

– *drive positive change through participation in social action and justice programs, locally, nationally, and internationally*

You took a lot of care choosing the verbs and phrases in this end, trying to capture the concepts of commitment, partnership, investment, and shared values, while keeping the language from getting unwieldy. In the end, you decided that the idea of participation encompassed the concepts above, even if it was not as nuanced as you had hoped.

### **Next Steps**

Once you had agreed on the ends statements, you asked me to read back to you all of the Nested Bowls work that you had done during the retreat. As I noted previously in this report, the rhythm, musicality, and poetry of the language was important to you. At this point, you were extremely positive about the things you had articulated. You felt strongly that you had authentically reflected what you had heard in your AI sessions, the AI worship service, and other communication with your congregation, *and* you were confident that your congregation would be excited and inspired by the vision you had cast. You were excited to consider what the next steps might be.

Here are some ideas for you to think about as you decide what to do with this careful and loving work that you are doing for UUFSD:

- Bring all three aspects of your Nested Bowls work to the congregation in the next couple of months, with an invitation for them to respond in a structured way.
- Consider how best to structure the opportunities for your Fellowship members to respond to your Nested Bowls work. The metaphor of the Nested Bowls will help you give your congregation meaningful opportunities to shape the work of the church while also emphasizing the boundaries that enable good governance: the board's responsibility in setting the ends and the minister and staff's responsibility in bringing the desired ends to reality. I recommend that you frame responses around these two questions:
  - 1) What, if anything, did we misunderstand or misrepresent?
  - 2) What, if anything, did we miss?
- Think about connecting with your Capital Campaign steering committee as soon as possible, ideally with enough time before their launch that they might be able to bring your values, mission, and ends to bear on their work. Although the time is tight, perhaps you might use them as a first response session. Be thoughtful on both the board's side and the Capital Campaign's side that the values, mission, ends that you've articulated are not the same thing as the Capital Campaign, though ideally it will be clear to see where they might intersect.
- Depending on your governance process, it may be appropriate or necessary for the board to formally adopt some or all of what you've articulated here, after you've had an opportunity to listen to your congregational response and once you've completed your final edits.
- You might consider incorporating the Nested Bowls process and the values, mission, and ends that you've written out here into a worship service.

## Ideas and Concepts from Appreciative Inquiry Process Congregational Visioning, February-March 2024

Community Elders  
Childhood friends Group  
wisdom Friends showing  
up

Collaborating Acceptance  
Unconditional love  
Oneness with pace  
Security

A constant  
It takes a village for children, selves Meeting  
new people and ideas Finding community  
Relief when others come to bat for you

Transcendence  
Pictures of stars over trees De  
Benneville  
Power of numbers  
Independent thinkers

Support of children and families the  
buildings  
unity at de Benneville  
anti-war protest dancing  
and song

experience of emptiness (Buddhist) Unique  
and everyone accepted being in Founders  
Hall the first time  
– the architecture  
anti-war protest  
Woodstock

UUFSO  
Group wisdom  
Showing up Bond  
Healing from the heart

Community purpose  
Ephemeral  
Connection that allows for deeper, more expansive  
experience and allows it to be shared  
Community has resonance over time and  
generations

Community's inclusive rather than insular  
If a forest is a community, why aren't we more like  
a forest?  
Power of generations  
Reflection time in Amphitheater

Family  
Sylvia's Kitchen  
People  
Music  
Power of community to get things done

Casa de Luz  
Housebuilding in  
Mexico Intentional  
community  
Accountability  
Growth

Evolving roles  
Shared values  
Sense of  
belonging Visible  
Being heard

Fil-a-belly  
Serving others  
Sharing of  
food  
Meals and celebrations  
Receiving donations

Volunteering  
Resources  
Things to do  
Increasing awareness of climate change  
Free of judgment

Love  
Caring for others  
Acceptance  
Meeting in outdoor amphi theater after the  
election of Trump – sharing feelings  
With birth of child- surrounded by love

Being with people and friends  
Socialize  
Supporting each other  
Parties – good music, drink  
Shared goals/views

Work toward improving our lives and word as a group  
Mirror ourselves – find people who are similar Give strength  
Groups give strength  
Groups include strength of others to get to our ideas

Listen to new members and their ideas Safe space to vent  
Trip to Cheryl's cabin – looked at stars, learned about each other  
Music, moving, singing Together Community building

Leadership Guiding  
desert trip Singing  
Dancing Happy Birthday  
Groups falling into place

Sharing music  
Synchronicity with life  
What we give up to be in community is much less than what we receive  
Community conversations can help us Community leads to magical experiences you wouldn't otherwise have

Beloved conversations  
Appreciation Celebration  
Spiritual restoration  
Communal connection

Service Wholeness  
Community connections  
Creativity  
Transformation: personal, communal, societal

Inclusive community Being in nature Deepening connections  
Making a difference for others  
Collective transformation through service

Wholeness through participation in art, nature, Other Generations  
Surrogate family  
Want 200 people working together on a theme  
Finding purpose in community

Interaction in synchrony Connecting to wider world Spirituality  
Choir- group effort to master together- help each other  
Driving social justice with volunteers

Power of community  
Generosity  
Appreciation – non-judgmental acceptance  
Solitude  
Community- friendship

Improve the world  
Intentionally equalitarian  
Spiritual searches Concern for others  
Camaraderie of community

Service to others  
Community nourishment  
Interdependent trust  
Supportive refuge  
Non-hierarchical – Egalitarian

Transformation  
Refuge  
Collaboration

## Core Values - initial list

community interdependence

welcoming/evolving

welcoming community

mutual nourishment

connection

creating joy

love

inclusivity

children RE

supporting younger generations

transformation

transcendence/transformation

growth/transformation

spiritual wholeness interdependent

transformation inspiration

transformative service

egalitarianism

service intentionality

intention

conscious intentionality

## Mission Statement - early drafts

**Final:** *We are a community rooted in love, acting with purpose and inspired to transform ourselves and the world.*

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*second drafts:*

Rooted in love, we come together, committed to purposeful transformation in ourselves and the world.

We come together, rooted in love, deepening connection, acting with purpose, transforming ourselves and the world.

We come together to transform ourselves and the world through purposeful action, rooted in love.

We come together, rooted in love, to deepen connections, transform ourselves, and act with purpose to advance justice in the world.

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*first drafts:*

Creating transformation in ourselves and in the world through purposeful acts of connection and love.

In supportive inclusive connect, rooted in love, we seek to create purpose and transformation.

We come together with love to deepen connection and act with purpose to transform ourselves and the world.

We are a welcoming, inclusive community of abundant love, seeking to deepen connections and work together with intention to create transformative joy and justice in the world.

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## **Ends Statements - proposals and themes**

**Note:** *some of these have been paraphrased from your original proposals*

### **COMMUNITY ROOTED IN LOVE**

- foster growth through shared worship and education
- be an open, welcoming, diverse community
- provide opportunities for meaningful intergenerational connections
- provide spiritual, emotional, and physical sustenance through pastoral & congregational care
- engage visitors' passions, not just their religious or spiritual concerns
- create programs and activities to connect what we do with our values
- show up at interfaith and community events
- offer compassionate care when congregants are in need
- open, respectful communication

### **ACTING WITH PURPOSE**

- creating intergenerational activities
- creating activities to acknowledge visitors of all ages
- offering service
- engaging new people
- supporting and engaging all congregants
- kids active in social justice
- creating all-fellowship events and inviting the community
- engaging, acknowledging, and welcoming visitors and children

### **TRANSFORM OURSELVES**

- learning from intergenerational relationships
- help people find their moral compass, be centered in values, and live their values
- offer opportunities for moral and spiritual exploration
- cultivate learning across ages, cultures, and ?
- embody moral exploration
- model transparency, openness, and directness

### **TRANSFORM THE WORLD**

- committed to being a positive agent (partner) for change, through participation in social action and justice programs, locally, nationally, and internationally
- support, invest our resources in, and partner with organizations that reflect and promote our essential values
- promote and enact change that dismantles oppression