

Interim Progress Report on the Process for Determining the Future of UUCB's Freestone Retreat Property

Report prepared by Rev. Dr. Michelle Collins, September 6, 2022

Context: UUCB owns a retreat property in Sonoma county and has used it for a variety of functions in the years that it has been owned. The institutional history of the property has been eventful, and a variety of feelings are held by many members concerning the ownership and use of the property.

Current discussions were initiated largely due to three factors. First, there is a great deal of tension and uncertainty present among many members of the church and leadership concerning the property, and since UUCB is currently in an interim time between longer term ministers, I named it as transitional work for the congregation in the hopes that moving through a healthy process to a decision would help the congregation to be in a healthier and less contentious place and set UUCB up well for their search for their next minister. Second, use of the property was and has continued to be curtailed due to concerns about its condition. There is a good deal of deferred maintenance on the property for which finances must be considered. Third, after the rental of the property to the Trackers youth summer camp in the summer of 2021 which resulted in a complaint by neighbors to the county and a subsequent code violation issued to UUCB by the county, it is the right time to consider continued use of the property in the context of Sonoma county permissions. .

The timeline and elements were modeled on the full congregation conflict meditation process devised by the Lombard Mennonite Peace Center. I decided on the lengthier process in order to allow adequate time for each of the elements and so the process would not feel rushed. This was in contrast to previous considerations, particularly the 2018 congregational vote, about which many members have shared with me feeling there was not enough process.

The goals were named as follows:

1. to achieve a result that is financially sustainable for the congregation and is mission-oriented
2. to provide opportunities for members of the congregation to be fully informed on the issues and to express their views and feelings on the issues
3. to move towards healing the hurt that has been done in the past
4. to develop a proposal that is acceptable to as many members of the congregation as possible
5. to discuss the issues openly, transparently, flexibly, and in the spirit of UUCB's congregational covenant and UU values

For this interim report, I'd like to assess how the process is doing with regards to each of these goals as well as name some other elements that have emerged.

Goal #1: to achieve a result that is financially sustainable for the congregation and is mission-oriented

This goal has two main parts, the financial part and congregational mission connection. "The mission of the Unitarian Universalist Church of Berkeley is to create loving community, inspire spiritual growth, and encourage lives of integrity, joy, and service." Now, it is usually problematic to solely look to connection or orientation to a mission statement because congregational mission statements are typically so generally worded that a wide variety of things can easily fall under them. UUCB's is no different from this. So I would encourage us to think differently about this question as there are a great many things that would be oriented towards the church's mission statement. Instead, it is more effective to think about prioritization. The resources of the congregation, members and volunteers,

financial, attention, use of space, and the like are relatively finite. So rather than merely mission connection, the question is rather what use of the congregation's resources would the congregation like to prioritize for the accomplishment of the mission.

This goal also names financial sustainability. This highlights what I've observed to be at least two separate realities that are now being faced. One reality involves the legacy of the Freestone property, the experiences that have happened there, the memories, the spiritual and interpersonal moments, and its part of the church's history. This is entirely separate from the financial questions regarding the property, both the question of what is necessary to get the property into a usable condition as well as ongoing costs and potential revenue streams. These make it a challenging dialogue process as one must hold both the emotional aspects alongside the rational ones. A particular difficulty is when each of these aspects pull in different directions. As UUCB moves forward with this dialogue, it will be important to stay aware of the presence of both of these aspects but also to not allow one to subsume the other.

Goal #2: to provide opportunities for members of the congregation to be fully informed on the issues and to express their views and feelings on the issues

The timeline has included many opportunities so far for engagement and expression with a number ahead as well. While it has been good to see many people attend the various programs as well as a good number take advantage of the in-person visit opportunities this summer, I would like to have seen a greater degree of participation from the congregation's membership. I am hopeful that attendance will increase as the time for the decision draws closer.

Another challenge is that there is a substantial amount of documentation supporting this dialogue and that not all of the documentation agrees. This is not surprising given the complexity of this overall issue. I would encourage all UUCB church members to review the documentation available in a Google Drive folder. The link for this folder may be found at <https://uucb.org/community/freestone-retreat-in-sonoma> via the blue button that says "Click here for documents." An annotated listing of the documents will be added to the folder with recommendations for important documents to read in your review of the materials.

Goal #3: to move towards healing the hurt that has been done in the past

This may be the most challenging goal of all of them as there is a good degree of hurt that has been done in the past related to Freestone. One reality that is important to keep in mind is that participants on "all sides" have been hurt at some point and that no "side" is exempt from having caused harm. It is unfortunate that many aspects of the dialogue on Freestone have become so polarized over time. Through the history timeline discussion in the spring and hearing through the sharing circles that are going on now, there are a variety of hurts and fears that are present for folks, and just because they happened in the past doesn't mean they don't affect someone now. I would encourage us to hold ourselves and one another with grace and know that these hurts and fears do affect how one may react in the present moment. Yes, mistakes and miscommunications have been made but it is also true that the future can be crafted with new agreements and commitments. I firmly believe of the importance of relationships in the congregation and hope that can be paramount for others as well as the way forward is crafted.

Goal #4: to develop a proposal that is acceptable to as many members of the congregation as possible

This goal is a difficult one in that one would of course prefer to find a proposal that satisfies everyone, but with the variety of possibilities on the table, this will simply be impossible. As possibilities are developed over the next month or so, I would encourage everyone to keep an open mind as much as

possible, embrace flexibility and creativity, and to not allow yourself to get stuck into thinking that one specific path is the one and only path. I direct this to everyone, not just a particular “side” of this matter. I would also encourage creative thinking about what the proposal is so that it is not just a “sell or keep” dichotomy but rather a path or set of possibilities to move towards. This thinking has been voiced by board members already and I hope will inform the formulation of options to be considered.

Goal #5: to discuss the issues openly, transparently, flexibly, and in the spirit of UUCB’s congregational covenant and UU values

One of the things that has plagued the past of Freestone at UUCB is that discussions were or were perceived as not being open or transparent with decisions being made or perceived to be made without consulting with or including various stakeholders. Now, I include perception in this observation and I would discourage the rehashing of the past to determine “actually” what happened. That is irrelevant, as it is the remaining perceptions that are real for folks. Rather than any debate about who actually said or didn’t say or did or didn’t do what in an attempt to exonerate oneself or to prove a point, I would encourage forward looking thinking instead.

Thus this process has been engaged with an eye towards transparency and openness in order to set a foundation for trust as we move forward. I would add that this includes the intention to present information as it is and trusting that UUCB members will be able to think through things themselves and come to their own conclusions, rather than feeling like their conclusion has been manipulated through the exclusion of information or the emotionality of its presentation.

Regarding covenant and values, to a great degree, engagement has been in line with UUCB’s covenant, and I hope that continues to be true. Regarding values, there is an important issue that I would like to raise. Regardless of the final outcome, I would strongly urge all participants to include only options that are ethical and legal for consideration. This is somewhat different from risk management, and there are judgment calls as to what falls under ethics and what falls under reduction of risk. I would urge the congregation to stay mindful of the complexity and to not stray from our ethics and values.

Additional Observation: Timeline Correlations

There have been a number of events in the recent history of Freestone that have had a good deal of tension. During this dialogue process, their correlation with other events in the congregation as well as the nation and world have become clear, as is demonstrated in the abbreviated timeline below.

When	Freestone Event	UUCB/Country/World
2016	UUCB board decided to stop allowing any rentals at Freestone	Most contentious election in recent U.S. history
2018	Board proposed sale of entire property. Congregational meeting for vote, over 50% in favor of selling but did not reach the 67% threshold set by the Board of Trustees for authorizing. Note that one of the possibilities in the dialogue was using the proceeds to help meet deficits in operating expenses.	At UUCB, financial management crisis revealed where the books were not matching movement of funds and it was perceived that the church did not have enough money to cover payroll. (This has since been resolved with a significant amount of work on the books and the conclusion of an outside audit last month.)
2018		Also at UUCB, the question of whether to stay or go from the hill was raised. A task force was

		formed in 2019 to explore the issue. (This has since been resolved – the question of leaving 1 Lawson Road is no longer on the table).
2020	Preservation of legacy and stories and return to “normal” raised more strongly in the dialogue	Covid pandemic disrupted social life in virtually every way

These correlations are significant for a number of reasons. The question of whether or not to sell church-owned property is always an existential one, that is, core to the identity and existence of a congregation. The 2016 election was an existential issue for the country making clear the deepening divides and polarities across the nation as well as increasing the level of contentiousness just about across the board. Given that context, it is not surprising that UUCB’s board made a decision from a position of risk aversion. I am not encouraging debating opinions on past decisions here but only raising the context in which they were made. Then in the context of the financial management crisis at UUCB, it makes sense that the question of whether to sell the property was raised. That this was concurrent with discussions about the 1 Lawson Road property is also not surprising. It is important for the congregation to engage with deep strategic questions, but it is also important to look back and see the stresses and tensions that have affected various events. I will say that I am always sad to hear of close and contentious congregational votes as they almost always cause a great deal of pain for a congregation. With the many differing opinions about Freestone and the near certainty of not satisfying everyone, I hope that UUCB can find ways to remain in relationship and keep the overall health and needs of the congregation at the forefront.

I have included the pandemic as concurrent with the time leading up to this discussion as a caution. With the degree of disrupted traditions and unraveling of so much social space, it is only natural to desire a “return to normal” and a reestablishment of what once was. I would encourage us to not allow this to limit our thinking and creativity as we imagine possibilities for Freestone. This includes thought about the entire array of possibilities for the future. Let us instead take the enormous disruption of the past two years as an opportunity to think about everything in new and creative ways.

Additional Observation: Fact vs Opinion vs Speculation

One thing I have observed as I have looked at the history of dialogue about Freestone is a seeming competition of facts, and I would strongly discourage this competition from continuing. I have heard reports from the past brought up whether they are being included in the current dialogue or not, and I have heard a variety of things that are frankly opinions touted as facts. Not everything that is part of the current discussion will be able to be stated as facts as the issues are far more complex than that. There are facts present; there are a variety of opinions; there are a variety of estimates for various work to be done; and there are speculations for what might or might not happen in the future. Many of the opinions do not agree with each other, particularly opinions from attorneys and others on interpretations of Sonoma county property codes and possible enforcement. One of the challenges is discerning what is fact and what is opinion and in balancing the various opinions to come to one’s own conclusions. Another challenge is that it is likely that definitive answers will not be able to be reached to resolve the differing opinions before the congregations decision is to be made (if not ever). Some of the opinions are more conservative than others, and one must decide where one falls with regards to comfort with degrees of risk. Some risk is always inevitable, so one must not proclaim an opinion as eliminating risk entirely as that is not possible either. While each UUCB member reviews the materials and attends to the conversations going on, I hope that each can keep in mind this aspect of the complexity.