



Inspired Faith Effective Action

A Social Justice Workbook for
Unitarian Universalist Congregations

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How to use this workbook:

- Read it over by yourself.
- Use it with relevant committees, action groups, etc. Set aside meeting time to go over specific sections, starting with religious grounding. Read it and share reactions, starting with personal/religious reactions and moving to congregational. Create discussion questions that are relevant for your congregation.
- Contact the Washington Office for Advocacy about having the workshop presented at your next district or multi-congregational gathering.

I. Religious Grounding

We regard our living together not as an unfortunate mishap
Warranting endless competition among us
But as a deliberate act of God
To make us a community of brothers and sisters
Jointly involved in the quest for a composite answer
To the varied problems of life.

--Steven Biko, South African Anti-apartheid Activist.

Whatever one identifies as the “beginning” of Unitarian Universalism, the ideas and theology inevitably had significant political implications. Consider the words spoken in 1568 by Frances David, court preacher to the Unitarian king of Transylvania, John Sigismund. At the height of the Spanish Inquisition, he was preaching that “We need not think alike to love alike!” Unitarians and their beliefs were a major influence in the founding of the US political system. Universalists and their beliefs were a major influence on US religion and culture.

Ours is a theology of engagement. We draw inspiration and truth from experiencing each other and the world around us. In doing so, we necessarily witness both the beauty and brokenness of our larger community and environment. We are here because we want to help heal the brokenness. We have chosen to do social justice work in our Unitarian Universalist congregations; in our religious community. Therefore it is important to remember that:

- **Unitarian Universalist congregations are religious communities, not secular activist organizations.** Seeking social change may be a major part of what we do, but fostering personal growth and building relationships are also critically important.
- **How the work is done is as important as the end goal of promoting justice.** If the justice work we do fails to build community—or worse yet, destroys it—then we will not have served our congregations or Association well.
- **Any congregational decision can be divisive if done badly,** which typically means that it was done too fast and congregants felt that their voices were not heard. The solution is not to avoid the decision, but to use an appropriate, healthy process that gives everyone a voice.
- **This is about personal transformation.** Our ability to create social transformation is linked with our willingness to go through personal transformation in the process. How can we expect the world to change if we’re not willing to?
- **We learn from reflection.** Educator and writer Paulo Freire, author of *Pedagogy of the Oppressed*, argued that we learn not from action, but from reflection on action. The cycle of action-reflection is often referred to as “praxis.”
- **We need strong relationships.** The more we are in relationship with each other, and approach social justice in ways that value this relationship, the better off we’ll be as a community. This type of sharing, namely personal, ethical, emotional, spiritual, and/or theological, is necessary both for effective justice work, and for personal and congregational development.

The Benefits...

of spiritually-grounded, transformative, congregation-based work

Effective congregation-based social justice work:

- Sustains us personally and congregationally by fostering personal religious growth and deepening collective religious understanding
- Provides a community space to authentically explore and address issues of systemic privilege and oppression
- Builds community and energy in the congregation—even across generations—by providing vision and inspiration
- Helps people in need
- Develops new leaders and skills
- Forms partnerships with other UU congregations, faith, and secular groups
- Builds bridges across barriers of race, class, sexual orientation and other differences
- Provides a great media angle
- Raises the profile/presence of the congregation in the community, potentially leading to growth
- Changes culture and policy

Tips on Doing Social Religiously Grounded Social Justice Work

- Do some relationship building and personal, theological discussions before jumping into the work. Discuss the differences between working in a Unitarian Universalist congregational setting and secular one. Talk personally about why you're passionate about the given issue, and why it's an important issue for Unitarian Universalism.
- Examine how systemic power, privilege and oppression impact the issue. Find out if there are groups who are the most affected by the issue that are active; act as allies and take your leadership cues from them.
- Be the change you wish to see. Model being centered, passionate, open-minded, and welcoming. Ask personal questions and share personal stories. Talk about your work in religious terms.
- Present your arguments using this model: I believe _____ (theological statement) therefore _____ (impact). Example: I believe in the interconnectedness of all life; therefore, if we hurt our planet, we are hurting ourselves.
- Identify yourself as a person of faith/Unitarian Universalist: make references to your congregation, minister, congregants etc.
- Include rituals in your activities: start with a chalice lighting, reading, and/or meditation. End with a closing reading or brief sharing. Always plan time for reflection and discussion following significant activities or events.
- Participate in a small group ministry such as a covenant group to help stay centered/grounded (i.e., do an activity that just meets your self-care needs).
- Hold "one-to-one" meetings with fellow members of your social action group to discuss personal and spiritual motivations for why you are involved. You might be surprised by what you share!

II. Congregation, Community & Acting with Accountability

“Being in diverse community is essential to making broad-based change in the United States. To enjoy the privilege and responsibility of being in diverse community, people are called to recognize that we share both a common humanity and particular social identities, which accord power in unbalanced ways. Bridging this power divide is at the heart of healing divisions Although we may share similar visions, the realities of living in a structurally inequitable society shape the attitudes, behaviors, and interactions of us all. In order to confront the power, privilege, and oppression that grow from social identities, we who seek a better world are called to do our own personal change work.”

From *Spirit in Action: Facilitating Circles of Change Curriculum Guide*, 2005, Spirit in Action, Inc.

UU congregations and their members have committed to act in ways that are anti-oppressive and accountable to historically marginalized groups in their congregations and communities.

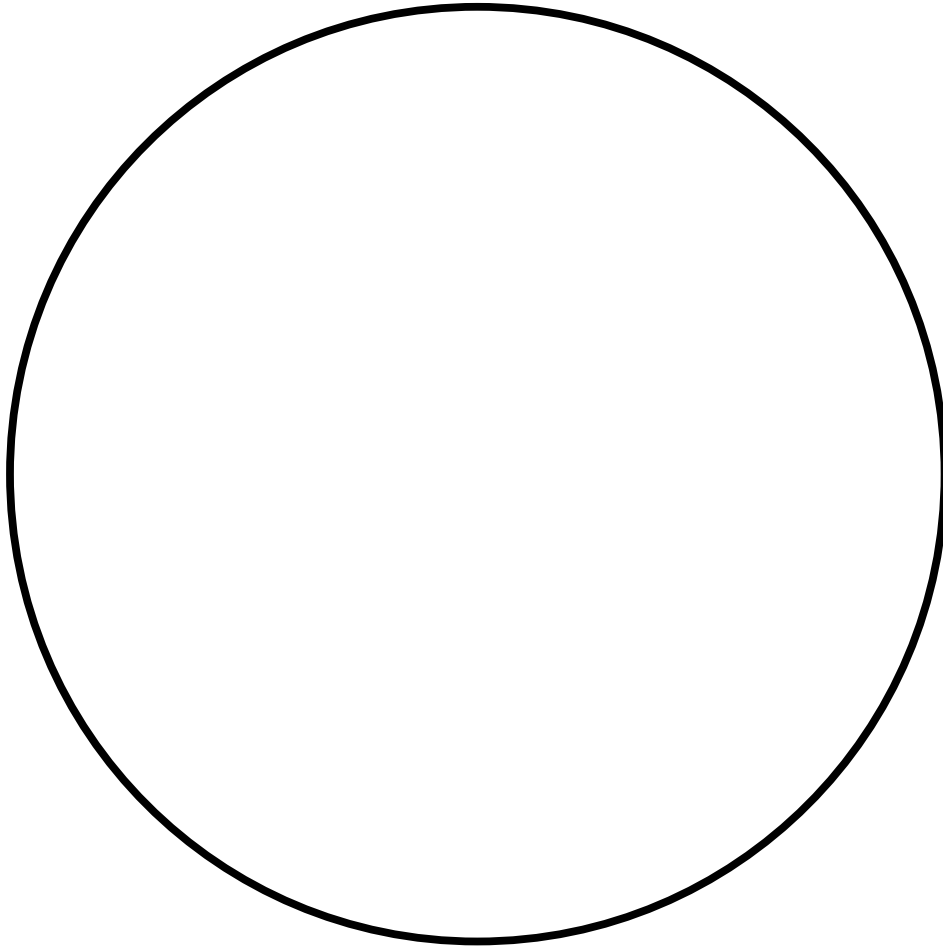
Accountability means being held responsible for one’s behavior and commitments. Accountability is critically important to effective social justice work, and within this context has two specific applications:

Accountability to the Affected: listening to the individuals and groups most affected by a problem and working to implement solutions they identify. This is especially important when relatively privileged people are working with people and groups representing more marginalized communities. While there is certainly some diversity of identities within Unitarian Universalism, most Unitarian Universalists are white, and UUs are among the most educated and wealthy people of faith in the United States. When working with groups composed primarily of people of color and/or of lower incomes, we need to be particularly conscious that we’re listening to their stories and following their leadership and not imposing our solutions. This is especially true because healthy relationships are a key component of effective organizations, and you can’t have healthy relationships if you don’t show respect and support for your partners.

Accountability to be Effective: using our power and resources strategically. As congregations, and as Association of Congregations, we have significant resources at our disposal, from budgets and buildings to time and energy. To be effective in seeking justice, we must use our power and resources strategically—meaning that we work to ensure that what we’re doing is going to have a real impact. A demonstration or congregational resolution can be an important tactic, but will not have much impact unless it is part of a larger plan to make change. Being effective requires having a concrete, achievable goal, as well as the plans and means to achieve it.

“From everyone to whom much has been given, much will be required.” — Luke 12:48

Identity Mapping



Knowing Your Congregation

What is your congregation's history related to social justice work?



About your congregation

- What are the needs and interests of the members of your congregation?
- What are the assets within your congregation, in terms of people, experience, money, time, etc?
- What is going on right now, in terms of social justice work? Think of there being **five types of justice work**: service, education, organizing, advocacy, and witness. Fill in the current projects in your congregation that fit into each category. Is there a balance of activities? Do your programs reflect your priorities?

Service	
Education	
Organizing	
Advocacy	
Witness	

One-to-Ones

A one-to-one is a personal conversation with an individual community member to learn about his/her concerns, level of interest and commitment for an issue, and the resources the person has to offer. At the same time, the activist organizer can introduce the issues of the congregation or social justice committee, and increase the level of awareness of the issue.

One-to-ones should take place in a quiet setting and last 30 minutes to an hour, during which time the activist organizer and the congregation member should develop a level of trust with one another. The community member will do most of the talking in a one-to-one, while the "interviewer" asks questions to clarify points and learn more detail.

How would one-to-ones help our congregation?

Facilitating one-to-one conversations between members of your social action group (or a group convened by the Board) and other members of the congregation lets you know which issues your congregation is most passionate about, what they have already been involved in and what actions they might be interested in organizing. This enables you to do your justice work in tune with the passion and desires of the members of your congregation. This means you will be MUCH more effective!

With whom should we conduct one-to-ones?

One-to-ones should start with a member of the congregation the social action group knows well. Also think of conducting one-to-ones with major stakeholders in the congregation and congregational board members. Contact that person and ask to sit down and visit with her or him. Also, every one-to-one should lead to future contacts. Ask for names of other members who may care about the issue.

What should we ask in a one-to-one?

Find out about the person you are interviewing. Ask open-ended questions. Some questions you should ask:

- How long have you been a member of the congregation?
- How long have you lived in the community?
- Have you been involved in social justice work through the congregation?
- Have you been or are you involved in other organizations that have been/are doing social justice work?
- How would you like to see the congregation be involved in the community?
- What would you like to see happen in the neighborhood around the congregation? In the community, region, and country?
- Has the issue in question affected you?
- In what ways would you consider being involved? Do you have special interests or skills to contribute?
- Do you know other people who might be interested in this issue and having a one-to-one?

Thanks to the Marin Institute for information on one-to-ones. For more information on conducting one-to-ones in your congregation, contact Susan Leslie at sleslie@uua.org.

Leadership Development:

Keeping your work accountable and sustainable

Sustaining a social justice program in your congregation relies on your committee or group's ability to develop new leaders who will take on responsibility and can lead the congregation in new and positive directions. Think of leadership development as a way of approaching everything you do as you engage in congregation-based social justice work.

Steps you can take to develop new leaders:

- Once you assume a leadership position, consider it your **first priority** to find your replacement and work with them throughout your term.
- Try not to do things for people that they can do themselves. This is especially important when working in **partnership**.
- **Alternate** who runs or facilitates meetings, who serves as spokesperson, and who plans or takes responsibility for various actions.
- Ask for feedback from new members of your committee or from other members of the congregation on decisions that are being made. **Be willing to be challenged and to change.**
- If you're doing something alone, stop and think about why that's the case and if you should be doing it at all. Sometimes it's better to let something fall than to carry it solely on your shoulders. This can be a good wake up call for others that they **cannot rely on one person to do all the work.**
- Provide **varying types of engagement** for members of your congregation. Different people will want to do different types of social justice work—direct service, education, witness, and advocacy—and new leaders will emerge naturally.
- Do **one-to-one conversations** between members of your group. These conversations not only allow people to understand each other's motivations and interests, but also build an accountability structure in which people begin working on behalf of the group rather than themselves individually.

Knowing Your Community

About your community:

- Who lives in your community? What are the demographics? Do not assume that you know; do some research. What do people care about? Who is marginalized? Use the one-on-one format described on the next page to find out!
- What social justice organizing is already going on?
- What relationships does your congregation already have within the community?
- What relationships do members of your congregation already have with community members or organizations independent of the congregation? Could a congregational connection be made?

Benefits of community partnerships and coalitions include:

- Fitting your work into an existing structure- not re-inventing the wheel! Filling a niche in the community organizing that may be empty
- Strength in numbers!
- More people = more hands. More people = more impact
- Opportunities for future collaboration on other issues
- Doing your work in an accountable way
- Bringing different constituencies together
- Cross barriers of race, class, sexual orientation and other differences
- Work is more effective
- Increase community connections
- Groups can specialize and take responsibility for different facets of the work
- Wider message
- Increased opportunities for media
- Seeing issues from multiple points of view
- Spreading the impact of Unitarian Universalism!
- Others?

What partnerships do you already have?

- Fill in the circles with your existing relationships. Add other circles as needed.



Being an Accountable Partner

To be an accountable partner with community groups (and within your own congregation):

- When considering a particular project, find out what is already happening in your community and talk to the individuals and group(s) most affected before taking action. Be conscious of the safety of those most at risk.
- Be willing to take a supporting role on issues that do not directly affect you. Look to affected groups for leadership.
- Be conscious of how much “space” you’re taking up. Are you listening or dominating the conversation? Are you showing respect to the work others have been doing, or barraging them with your solutions? Are you believing their stories and perspectives, or asking critical questions to make them prove themselves?
- Partner with organizations recognized as legitimate representatives of the community you are working with, not self-appointed or vigilante groups.
- Foster awareness of your own and the congregation’s power, privilege, and history both as complicit with the status quo and as resisters and transformative agents.
- Structure your meetings and events in a manner that is inclusive and accessible to many different people, including those with special needs.
- For tips on *Becoming a Good Ally*, see <http://www.uua.org/socialjustice/resources>.

Meeting the Challenges of Working in Coalitions

- **Honor religious differences between Unitarian Universalists and other religions, particularly theologically conservative, economically liberal congregations.** UUs need to honor Christian norms of prayer and hymns while taking our turn to provide invocations, closings, interfaith prayers or meditations, or offering suggestions for alternatives.
- **Commit for the long haul; systemic change takes time.** Issues cannot be won until relationships are created and power is amassed, and it takes a while to build relationships. This way of operating is different from that of typical social action projects that have a beginning and an end—and that commonly have a far smaller impact.
- **Gain experience in organizing around issues of race and class.** Congregations meet this challenge by educating themselves before they join, often inviting speakers from coalition groups to help orient them. Many congregations have members who work on these issues as well.
- **Deal with the UU propensity toward individualism.** Historically, UUs value dissent and don't like to sacrifice individual liberty to be part of a group process. This can lead to a dilemma when the coalition takes a stance that may be contrary to the views of some congregational members.
- **Manage growing demands for time and energy.** Coalitions demand a time commitment from both clergy and congregational members. Congregants may question if coalition work is a higher priority than other congregational matters. It's important that members know that there are other ways they can contribute to their spiritual communities and work for social change. Recruitment needs to be continuous to make it possible to maintain a healthy rotation.
- **Handle growing financial priorities.** While some congregations report initial difficulty in gaining board approval to contribute financially to coalition work, later they reported that this challenge actually helped their congregations. The congregation developed a stronger sense of accountability - they had to demonstrate to the board how the congregation was contributing to and benefiting from their involvement.
- **Address tensions between middle- and low-income communities and between white and people of color communities.** Broadly speaking, members of different class and racial groups have to confront fears, stereotypes, and misconceptions they have about each other. Working together to achieve shared goals is an excellent antidote for these tensions. As people get to know one another individually, they discover their shared humanity and values. Coalitions empower historically marginalized groups and create opportunities for those groups with more institutional privilege to act as good allies.
- **The different orientation of urban and suburban congregations.** Suburban congregations often feel unconnected to the city. Each congregation needs to determine its self-interest and how it is linked with the self-interests of city-dwellers. Coalition work on the regional level, state and national level also identifies common interests.

III. Strategic Planning and Implementation

Choosing an Issue:

Determining Grounding, Accountability, Fit, and Opportunity

Grounding: Does the issue have authentic and deep Unitarian Universalist roots? Does it link to the current identity and theology/philosophy of Unitarian Universalists?

- *Theology/philosophy* – What is the spiritual, philosophical, historical, and ethical basis for our position?
- *Worship and Congregational Life* – What is our members' engagement on the theme in the congregation?
- *Social Action* – Is there historic and current UU engagement on the theme in the public arena?

Accountability: Is the issue of concern to marginalized groups in the congregation and in the community?

- Can the congregation be an effective and sensitive ally? Is the congregation educated about how the issue impacts marginalized communities?
- Can reconciliation and right relationship be an outcome of working on this issue?
- Are there opportunities for dismantling institutional oppression? For systemic reform? For reparations?

Fit: Is there a match between our congregation's resources, aspirations, and ability to make a real difference?

- *Informed and Inspiring Leaders* – Are there Unitarian Universalists who are or could publicly represent a UU perspective on the theme?
- *Institutional Resources* – Is there a task group devoted to the issue? Has the minister spoken out? Is there money available for the effort? What UUA offices, committees, affiliates, publications, curricula exist to support the congregation in taking a position?
- *Partners* – Are there national and/or local interfaith and allied organizations the congregation or UUA has a history of partnership with or that are actively seeking partners?

Opportunity: Is there likelihood that the congregation can be a respected participant in the public dialogue on this issue? Are there allies the congregation can work with? Are there debates in the public arena, proposed legislation that Unitarian Universalists can influence?

- *Relevance in News and Public Dialogue* – What is the degree to which the theme is or could become a meaningful factor in news coverage or public debate?
- *Other Voices – Congruent:* What religious and secular organizations share our views and are vocal?
- *Other Voices – Contrary:* What religious and secular organizations oppose our views and are vocal?

Grounding, Accountability, Fit & Opportunity Worksheet

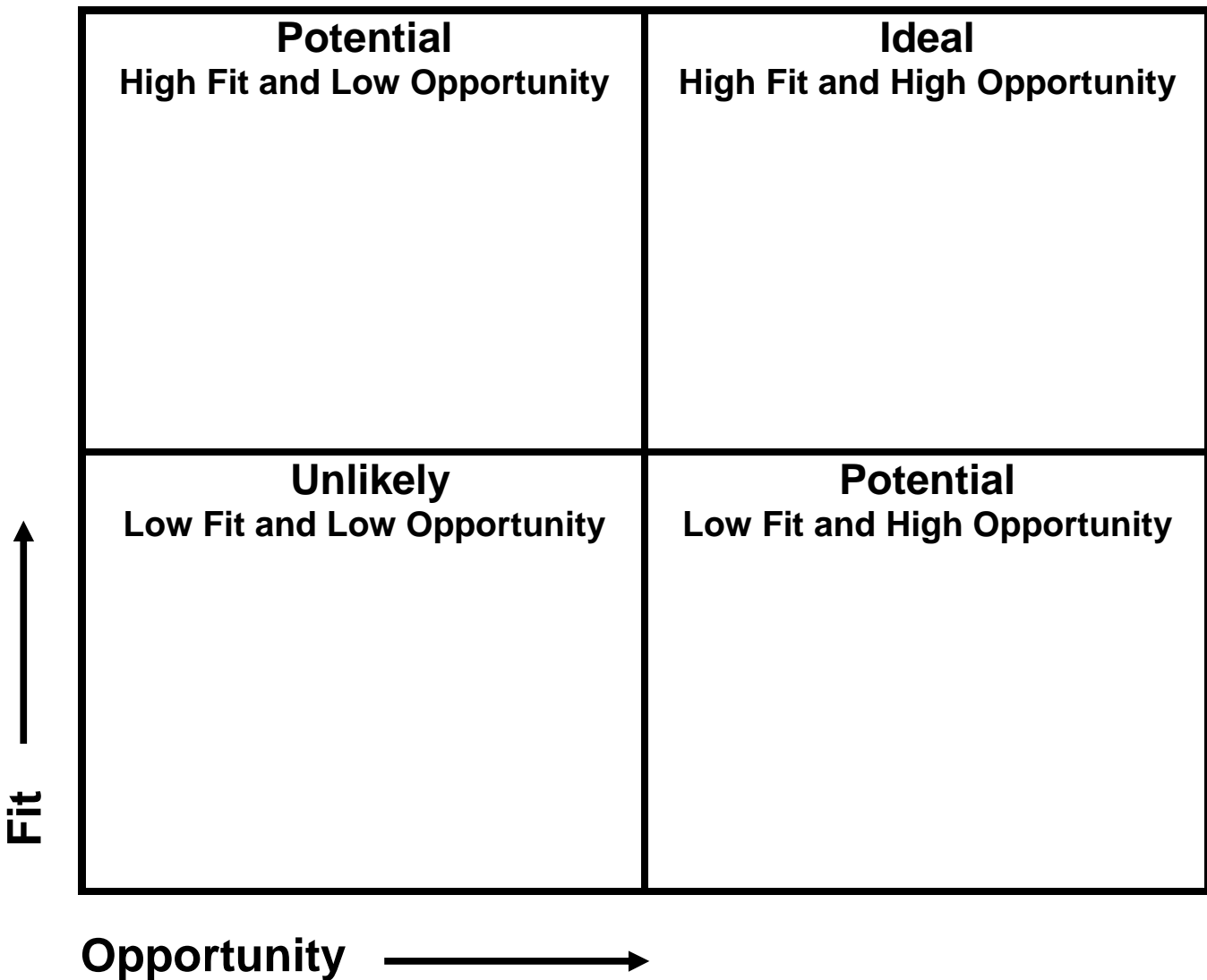
Use this worksheet to assess the grounding, accountability, fit and opportunity for issues that your congregation is working on or could potentially work on. It may be helpful to answer some of the questions on the previous page.

Issue: _____

Grounding	Accountability
Fit	Opportunity

Mapping Fit and Opportunity

For issues where you have **grounding and accountability**, use the chart below to plot the amount of fit and opportunity. The issues with high fit and high opportunity are ones you should consider making priorities. Others may be important but more education may be needed and/or relationships with partners may need to be developed. For help on grounding, you may want to consult the Social Justice Statements passed by the UUA General Assembly, which can be found at www.uua.org/statements/index.php.



Understanding Goals and Risks

“...To pursue the impossible dream is a cop-out. If I pursue an impossible dream, I get to look noble without ever having to risk anything. Glorious failure is guaranteed.

What [takes] courage is to pursue a **possible dream**. A possible dream is doable; it is a reachable star. A possible dream stretches us; it calls for a deep and enduring commitment. A possible dream exposes us to the real risk of failure — the failure to do what we might have done, could have done and should have done.”

-Excerpt from sermon "To Dream the Possible Dream"
By the Rev. Peter Morales

It's important to choose a goal that is both **concrete** and **achievable**. Set your sights high, but not so high that you cannot possibly accomplish the goal you've set. This is a **risky** thing to do, but much more effective systemically and in the long run.

Small easy goal Immediate, limited impact	Concrete, achievable goal Systemic Impact	Huge goal Long term/May never happen
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Low risk Host a Community Dialogue on Comprehensive Sexuality Education	High risk Influence your local school board to get Comprehensive Sex-ed programs in your schools	Low risk Comprehensive Sex-ed programs in every school in America
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Note: The point here is not to denigrate 'low risk' activities, but to be aware of choosing at least one 'high risk' project as part of a mix of social justice activities.

The next three pages are borrowed from the Midwest Academy. Once you have chosen an issue and set concrete achievable goals you can use the following strategy chart to build a successful campaign to realize your goals. So turn the page and....

...Create a Strategic Plan...

Midwest Academy Strategy Chart

After choosing your issue, fill in this chart as a guide to developing strategy. Be specific. List all the possibilities.

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics
<p>1. List the long-term objectives of your campaign.</p> <p>2. State the intermediate goals for this issue campaign. What constitutes victory?</p> <p><i>How will the campaign</i></p> <ul style="list-style-type: none"> • Win concrete improvement in people's lives? • Give people a sense of their own power? • Alter the relations of power? <p>3. What short-term or partial victories can you win as steps toward your long-term goal?</p>	<p>1. List the resources that your organization brings to the campaign. Include money, number of staff, facilities, reputation, canvass, etc.</p> <p>What is the budget, including in-kind contributions, for this campaign?</p> <p>2. List the specific ways in which you want your organization to be strengthened by this campaign. Fill in numbers for each:</p> <ul style="list-style-type: none"> • Expand leadership group • Increase experience of existing leadership • Build membership base • Expand into new constituencies • Raise more money <p>3. List internal problems that have to be considered if the campaign is to succeed.</p>	<p>1. Who cares about this issue enough to join in or help the organization?</p> <ul style="list-style-type: none"> • Whose problem is it? • What do they gain if they win? • What risks are they taking? • What power do they have over the target? • Into what groups are they organized? <p>2. Who are your opponents?</p> <ul style="list-style-type: none"> • What will your victory cost them? • What will they do/spend to oppose you? • How strong are they? 	<p>1. Primary Targets</p> <p>A target is always a person. It is never an institution or elected body.</p> <ul style="list-style-type: none"> • Who has the power to give you what you want? • What power do you have over them? <p>2. Secondary Targets</p> <ul style="list-style-type: none"> • Who has power over the people with the power to give you what you want? • What power do you have over them? 	<p>For each target, list the tactics that each constituent group can best use to make its power felt.</p> <p>Tactics must be</p> <ul style="list-style-type: none"> • In context. • Flexible and creative. • Directed at a specific target. • Make sense to the membership. • Be backed up by a specific form of power. <p>Tactics include</p> <ul style="list-style-type: none"> • Media events • Actions for information and demands • Public hearings • Strikes • Voter registration and voter education • Lawsuits • Accountability sessions • Elections • Negotiations

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Midwest Academy Strategy Chart for "Fair Tax Campaign"

Tactics

Targets

Constituents, Allies, and Opponents

Organizational Considerations

Goals

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics
<p>1. Long-Term Goals</p> <ul style="list-style-type: none"> State budget well funded by a progressive tax system. Full funding of schools by the state. <p>2. Intermediate Goals</p> <ul style="list-style-type: none"> Pass the Citizens' Fair Tax Plan. Win support of key legislative leaders from the 5th, 7th and 14th districts, or develop an anti-Fair Tax record for future races. <p>3. Short-term Goals</p> <ul style="list-style-type: none"> Public support from local officials. Line up influential sponsors in House and Senate by April. 25 cosponsors by June 1. 	<p>1. Resources to put in</p> <ul style="list-style-type: none"> Salaries and expenses for six months = \$45,000. On hand = \$10,000. To raise = \$35,000. Staff Mary—Lead Organizer, full time Fred—Organizer, half time Sam—Support Staff, 1 day a week Liz—College intern, 1 day a week Kate—Supervisor, 4 hrs a week (cash value of staff time = \$40,000) Phone canvass. Approx. 5 canvassers. 7 board members on the tax committee. Each represents an affiliate organization. Committee chair. Very active. Good spokesperson Lobbyist from allied union Tax expert contributed to us by Citizens for Tax Neatness. Office space and phones for all staff (cash value = \$700). 1 Xerox that works, 1 that sort of works. 2 computers. (cash value for use = \$200) Good relations with press. Abner Berry at the <i>Sentinel</i> and Al Ferman at the <i>Herald</i>. <p>2. What We Want to Get Out of It</p> <ul style="list-style-type: none"> Make back all expenses (\$45,000) through contributions from affiliates and campaign fund-raising. 4 new affiliates. Most likely choices are Carver City Taxpayers Against Waste, Newton Teachers Local 310, Association of Child Service Providers, Gotham City Save Our Schools Committee Build a base in the 5th, 7th, and 14th districts. Promote George, Frieda, and Kim as respective spokespersons. Develop 15 active volunteers. Develop ways to activate 15,000 canvass members in key districts. <p>3. Problems to Solve</p> <ul style="list-style-type: none"> Rivalry between teachers' unions may erupt. —Meet with them. Ask them to keep turf fight out of it. Uptown Seniors don't like Downtown Seniors. —Hold separate meetings in each community. Fred says that Mary whistles through her nose all day and he can't work in the same office with her. —Seek treatment for Fred since no one else ever hears Mary do this. 	<p>1. Constituents and Allies</p> <ul style="list-style-type: none"> State Teachers Union: 7,000 members Local 210 Gotham City Local 113 Newton Local 69 Butler Local 666 Spuyten Duyvil State Teachers Association: 12,000 members List locals State Public Employees Union: 14,000 members List locals State Labor Federation: 40,000 members List active locals and labor councils Association of Day Care Centers: 1,200 members State Senior Council: 3,000 members Clubs in Parker (5th District) Gotham Newton (7th District) Salem Winchester (14th District) Westchester Council of Home Health Care Providers Newton Council of Civic Associations State Alliance of PTAs Taxpayers Union: 2,000 members <p>2. Opponents</p> <ul style="list-style-type: none"> Chamber of Commerce Bankers Association Insurance Industry Council Johnson Corp. Taxpayers Association of Hatemal 	<p>1. Primary Targets</p> <ul style="list-style-type: none"> Governor Winthrop House Tax Committee Chair Rep. Bacon (5th District) Senate Committee Chair Rep. Lax Committee members, to be determined Other legislators, to be determined <p>2. Secondary Targets</p> <ul style="list-style-type: none"> Dem. Chairman—includes 14th Dist. R. Waterdown—Kent County Dem. Chairman—includes 7th Dist. Selected campaign contributors to individuals listed above County Commissioners in the counties containing target districts 	<p>(Listed more or less in the order in which they might actually be used)</p> <ul style="list-style-type: none"> Media hits. Feature unjust tax distribution between homeowners and EXXON refinery. More media hits. Spotlight education cuts. Kids come with symbols of cut programs, e.g., sports equipment, musical instruments. Do same day in four cities with teacher organizations and PTAs. Make this an issue in the next gubernatorial primary. Start postcard campaign for fair taxes. "Dear Gov., When my income goes over \$200,000, I will happily pay higher taxes if you enact them now." Media hit in capital to release detailed Fair Tax Plan. Sponsors and cosponsors on hand. Canvassers start petition drive in targeted districts. Media hits in targeted districts to announce formation of district Fair Tax committees to put legislation on the spot. Show petitions. Delegation meetings to get position of targeted legislators. Local hearings. Either sponsors hold them officially or we hold them. Aim for high turnout. Additional delegation meetings in target district. Service providers, seniors, clients of programs are included. Save our school. Rallies and picnics. Fund-raiser. TV debate between our leader and legislative opponents. Tax bill burning day when tax bills are sent out. Accountability sessions in targeted districts, particularly the 5th, 7th, and 14th districts. Mass lobby day in capital when bill comes up for vote. Governor invited to speak for the bill. Empty chair if he doesn't. Invite potential opponents.

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Midwest Academy Strategy Chart

Goals	Organizational Considerations	Constituents, Allies, and Opponents	Targets	Tactics

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that users not modify the chart.

IV. Skills and Tactics

Service

General tips: In addition to the direct benefits to others, service is an opportunity for individuals to build relationships and grow spiritually. As such, reflecting on the service is equally important as the service itself. How did it make you feel? What was the relationship like between you and those you were serving? What role did race, class, gender, and other factors play?

- Soup Kitchen
- Clothing Drive
- Thanksgiving Food Drive
- Adopt-a-Family Programs
- Care Packages for Military
- Women and Men
- Homeless Shelter
- Medical Clinic
- Blood Drive

Education

General Tips: Have an idea of what kinds of programs your congregation or community partners are interested in and would attend. Educational programs and messages can be tailored to general or specific audiences. Know your audience! If inviting a congregation or community-wide audience, be sure to touch on aspects of each constituency's involvement in an issue. Include some form of follow-up action or reflection on the forum or class that you are facilitating. Have attendees sign up for an advocacy campaign or a service project with your Adult or Youth RE class.

- Congregational Forum
- Community Forum
- Guest Speaker
- Adult RE classes
- Children/Youth RE classes
- Community classes
- Pulpit exchange with partner churches (UU and other denominations)
- Letters to the Editor (local)
- Op-Ed in local paper

Organizing

One Example of Partnership: Congregation Based Community Organizing (CBCO) is a movement that seeks to establish grassroots organizations for purposes of **increasing social integration and power** in civil society.

CBCO Organizations are:

*Interfaith

* Multi-Ethnic

*Economically Diverse

* Multi-Racial

Goals include **making civic, regional and state-wide changes for social improvement.**

Over 110 Unitarian Universalist congregations are members of CBCOs. The Office for Congregational Advocacy and Witness provides resources and support for congregations interested in or engaged in CBCO.

Contact Susan Leslie, Director of the Office for Congregational Advocacy and Witness, at sleslie@uua.org or (617) 948-4607 for more information or to share your congregation's story of involvement in your local CBCO.

To learn more, visit: www.uua.org/programs/justice/cbco.html

Other examples of partnerships and coalitions:

- Groups within your congregation (including but not limited to the Youth Group, RE parents, Campus Ministry group, Women's group, etc.)
- Interfaith Organizations and other religious groups in your community
- Other Unitarian Universalist congregations in your area
- National Organizations
- Secular Community Organizations
- Local government or city council
- Schools or Universities

Advocacy

The roots of the word *advocacy* have to do with lending assistance, calling for a voice to speak out. Advocacy is a way of raising your voice, speaking on behalf of yourself and those people or causes you stand with. In this case, we use *advocacy* to mean lobbying and anything else that brings your voice to your elected officials, or to others who change and make policy. We UUs have the skills and resources to be excellent lobbyists and compelling spokespeople for our causes.

“It was an invigorating and empowering experience...I was surprised...at how much time some of the delegates were taking out of their intensely packed schedules to see us...My son's delegate...spent 15 minutes just to talk with him alone.” –Member of UU Congregation on first lobby visit

“Most moving was... getting to go lobby! I had an amazing experience with the staff persons at all the offices I went to. All the staff persons were extremely candid, sharing their own personal experiences and opinions on sex education. I felt so at ease...Thanks again for this amazing experience!” --Young Adult Participant, UUA Sexuality Education Advocacy Training 2006

Advocacy can include personal lobby visits, phone calls, emails, letters, or petitions. Group lobby visits are one of the most highly effective forms of advocacy. After a visit, writing letters and making telephone calls are highly effective; postcards, petitions, and emails (provided they include your name and address) also have some impact, but considerably less.

What you need to know about the IRS restrictions on lobbying

Religious organizations and congregations **are** allowed to do advocacy, but must follow certain guidelines from the IRS. The three basic rules are:

1. **No Limits on Advocacy and Education** (activities that raise awareness on a given issue but don't encourage the public to support /oppose specific legislation).
2. **Narrow Limit on Lobbying** (advocating for or against specific pieces of legislation).
3. **Total Limit on Partisan Politics** (anything that advocates for or against candidates or parties).

According to the IRS, lobbying must be an "unsubstantial" portion of an organization's activities. The IRS has not defined what this means exactly, but it's generally agreed that up to 5% is fine. However, that's 5% of the total activities of the organization, including money for the building and staff salaries, all staff and volunteer hours, etc. As such, it is highly, highly unlikely that any congregation would come anywhere near the “substantial” threshold.

For more information, see *The Real Rules: Congregations and IRS Guidelines on Advocacy, Elections, and Lobbying* at www.uua.org/action/realrules/index.shtml. The full *Real Rules* is 16 pages; a 4-page executive summary is also available.

Lobbying

Many people on their first lobby visit are surprised at how simple and empowering lobbying can be. Lobby visits are usually short, staff members you meet with are generally pleasant, and it's not essential for you to be an experienced politician. Particularly when lobbying on social justice issues, it is far more important to be a constituent and/or someone affected by the issue than it is to be an expert in Congressional procedure or in the nuances of a particular bill.

Identify an Issue. Since visits are short, you won't have time to discuss your views on every issue. Pick something specific, and stick to it.

Assemble a Group. Group visits are more influential than individual visits—especially if you have a broad, diverse delegation—and can help build relationships and skills among activists. Aim for 3-5 people (more can be hard to coordinate). Look for allies in:

- Your congregation
- Interfaith groups
- Issue coalitions
- Secular non-profits
- Interested business group

Schedule a Visit:

- **Identify a rough time frame** for your visit and compile a list of all those who are potentially interested (you may not get your first choice for a time).
- **Check your Congress Member's website** for information on setting up a meeting—many offices require a written request.
- **If you cannot find out how to schedule a meeting online, call the office** and ask to speak to the person in charge of scheduling. Identify yourself as a constituent and member of [name your congregation/coalition], and request a meeting with the Representative/Senator, or staffer on [name your issue].
- **Plan for the process to take 1-3 weeks.** Setting up a visit often requires several follow-ups calls.

Prepare for the Visit:

- **Learn something about the official's record** on the issue. Ideally you'll find something positive to thank them for that connects with the request you're about to make.
- **Once you know where the office stands, determine your "ask".** Your ask should be a specific action, such as voting for/against a certain bill.
 - A supportive member of Congress can be thanked for their leadership on the issue and asked to encourage other offices to support the issue.
 - An member of Congress who is on the fence can be asked to vote for/against a bill, and educated about the issue with compelling personal stories.
 - A member of Congress in opposition can be reminded that they have constituents who disagree and/or will be hurt by the policies.
- **Identify your best arguments** and assign each member of your delegation responsibility for covering one or more points. Read leading advocacy organizations' websites; try the www.uua.org/socialjustice links page for starters. Familiarize yourself with the arguments of the "opposition" and be prepared to counter them.
- **Gather compelling personal stories.** These will stick in people's heads longer than facts—although you should also have some facts to help validate your stories.

- **Clarify religious grounding**—Reflect on why this issue is a matter of faith, and be prepared to communicate this succinctly.
- **Bring a packet of supporting materials** to leave with the office. Your information packet might include:
 - **Information about your organization and contact information**
 - Letters or handouts from yourself or from supportive organizations
 - Background information or polling
 - Personal stories
 - Local media coverage and newspaper editorials.

Conducting the Visit

- Dress neatly and conservatively. Have a brief review and pep rally outside the office beforehand (perhaps also with a meditation or prayer).
- Remember that you're trying to build a relationship, so your disposition/approach should be polite and reasonable. Relax. Stick to your message and avoid speaking out of anger or frustration.
- Expect some introductions and pleasantries: who you are, where you're from, etc. One person (generally the person who set up the visit) should take the lead by introducing the group and the reason for the visit. For example: "Good Morning, Senator Smith. Thanks for meeting with us. We're here from the Unitarian Universalist Congregation of Cityville, with 250 members, to talk about the Marriage Amendment, S.J. Res. 1, and we'd like to introduce ourselves and say a little about why we feel strongly about this issue.")
- Have each person make their arguments and conclude with your ask. Use your stories and validate them with facts. Thank the official for something if at all possible. Be prepared for the questions and give-and-take of the visit; but always keep returning to your central message.
- If you don't know an answer, say so. If the Member or staffer asks you for information that you do not have, say that you do not have it but will get it to them within a few days. Never lie or make things up!
- Press for a commitment. Will they support your position? If not, why not? When and how will they make a decision?
- End on a positive note. If you have found common ground, recognize where you disagree, but return to that "feel good" point.

After the Visit

- Debrief with your group. How did that go? Were participants happy with how they did? What arguments were most influential? What are the key factors in their decision-making, and what else can you do to influence them?
- Report how the visit went to others in the congregation or other organizations, especially if the visit is part of a larger effort.
- Follow up with the office by sending a thank you letter to the Member or staffer you met with, along with any additional information and materials you pledged to provide. Building a relationship with an office is the best way to make your voice heard. A meeting gets your foot in the door—it's in the follow-up that you're going to see results.
- Encourage others you know to do similar visits.

Witness

Using the Media

Types of Media

- **Paid:** Advertising.
- **Unearned:** Coverage you get without taking any steps to get it. For example, the paper covers your lobby day for marriage equality because they just happened to hear about it and decided it was newsworthy on their own.
- **Earned:** Coverage you get due to intentionally seeking coverage. For example, the paper covers your lobby day for marriage equality because you invited them.

Earning Media

Successfully earning media means that you (1) are doing something that is newsworthy, and (2) have invited coverage effectively. To meet both of these criteria, you must understand how the media works and plan accordingly.

1. What is Newsworthy?

H. Fred Garcia, the UUA's expert media consultant, likes to sum up the components of a good news story as "the 5 C's." These are the elements that reporters are looking for. The 5 C's are:

Conflict • Contradiction • Controversy • Colorful Language • Cast of Characters

When seeking coverage, the question to ask is "What is our hook?" In seeking an answer, try to draw from the 5 Cs. Think of ways you can involve these elements. If what you're doing seems like the same people doing the same things you've always done, with nothing new or different, getting coverage will be difficult. The main exception is if you've established yourself as a credible voice in the community on a particular issue, and have good relationships with the media so they keep coming back to you whenever the issue comes up.

2. Working with the Media

Working with the media can feel intimidating, and it does require some particular skills and ways of thinking. The good news is that with adequate preparation, planning, and practice, most people and congregations can learn how to work with media effectively. To learn more, see the newly-released *Sharing the Good News: A Public Relations Manual for Congregations*. This manual includes tips for congregational organizing and the specifics of media relations, including writing press releases, preparing for interviews, etc. *Sharing the Good News* and other media resources are available on UUA.org at http://www.uua.org/documents/info/pr_manual.pdf.

See also the resources offered by Fenton Communication, a public interest firm, at http://www.fenton.com/pages/5_resources/1_bestpractices.htm. Their guide *Now Hear This* lays out the steps necessary for a successful media campaign. The recently-released *This Just In: 10 Lessons From Two Decades of Public Communication* is also very helpful.

Developing Your Message

Whatever the strategy, tactic, or activity, your campaign should be guided by a clear message. Ideally your message says (1) Who you are; (2) What you are doing; and (3) Why others should join you.

1. **Identify and segment your audience** as much as possible. Your audience should never be “the public,” but specific groups and sub-groups that are likely to be mobilized or changed by your work.
2. **Clearly define the problem and the solution.** Identify the actions /changes that are needed.
3. **Frame your message.** When folks hear your message, what do you want them to think and feel? What are the key concepts that you want to communicate?

For more on framing, see *Don't Think of Elephant* by George Lakoff. Chelsea Green Publishing Company, 2004. <http://www.chelseagreen.com/2004/items/elephant>.

4. **Message development:** What are the concise words and phrases that will communicate your message effectively? What words will activate the frame (i.e., trigger the concepts) you seek? What popular slogans or concepts can you adapt/subvert for your cause? What is your opposition saying? Things to keep in mind:
 - Make sure your messages are concise, grounded in UU theology, and easy to understand.
 - Use big ideas and universal values like fairness, equality, justice, protection, reward-for-work, family, community, etc.
 - Tell the truth as we see it– tell it straightforwardly and articulately, with moral conviction and without hesitation.
 - Have no more than three main message points. For example, on the issue of marriage Equality, you might emphasize that:
 - All families deserve the legal benefits of marriage.
 - Civil marriage is a civil right.
 - Unitarian Universalists stand on the side of love.

V. Successful Social Action

Social Justice as Congregational Ministry

Deepen Congregational Identity: A successful social justice congregation has a sense of mission and purpose. Members are familiar with the history of the congregation's involvement in social justice in the community and its part in the larger UU movement.

Develop Visions and Values: Have a vision of what could be. Don't just identify problems. Connect political beliefs with spiritual values. Practice developing messages and framing issues with UU theology.

Be Intentional: In order to be successful, a congregation must intentionally set a path for justice work. Priorities should be established as a congregation; clear goals/objectives set; decision-making processes clarified. Discover the passions of the members. Carefully analyze the problems to be solved. Action is concrete, specific, and manageable. Congregational structures are examined with social justice in mind. Changes are made to structures that do not support social justice efforts. Examples of congregational structures and policies to consider are: *Budget, By-laws, Representation (who speaks for the congregation and when?), committee and task force structure, and leadership.*

Pursue Ministerial Leadership: Ministerial support for justice work, including preaching, connection to the wider justice world, goal setting, and leadership development is key. A minister needs his or her congregation's support in achieving a healthy balance between pastoral and prophetic work.

Keep the Faith: As together we walk the path toward justice, there will be great successes, and there will be times of great despair. This is why we dare not walk alone. Engage our UU faith as a source of strength and reflection for the congregation's social justice work. Encourage members to articulate how their theology informs their social justice efforts. Include activities at social justice programs that feed the soul – music, art, poetry, prayer.

Make it Easy to Pursue Justice Work through the Congregation: In successful social justice congregations, at least 20% of the congregation is involved in some kind of justice work. Many members work or volunteer with justice-related organizations outside of church. Social justice ministry is seen as a part of the life of the congregation. Justice work is integrated into worship, RE, social programs, etc., and is highly visible. This means that new faces and new ideas are welcomed and incorporated into committees and taskforces. This requires an honest sense of when seasoned leaders should "step back" and make a

commitment to leadership development. Many congregations have developed databases that chart members' interests, membership in other organizations, skills, and expertise and match them with justice efforts.

Utilize UUA Resources Mindfully: Our Association makes many resources and trainings available to its member congregations, and they should be reviewed and considered regularly. Anti-Racism training, JUUST Change Anti-Oppression Consultancy, Welcoming Congregation work or the Social Justice Empowerment Program might be just what's needed to start the congregation on a path toward a more active role in society. Contact UUA staff listed at the end of this workbook to discuss the best and most appropriate workshop or resources for your congregation.

Make Full Use of the Financial Resources of the Congregation: Social justice leaders should draw on the financial resources of the congregation and its members. They can also apply for funding from the Unitarian Universalist Funding Program.

Be Mindful of Balance: A variety of voices should be heard in planning meetings and in justice work. If social justice issues are raised by a single or a few voices only, this should be addressed. In addition, if the congregation engages in all (or most) of the various types of social justice work (service, education, advocacy, witness, organizing), the overall justice programming will be stronger and more effective.

Be a Good Partner: Join interfaith and community coalitions. There is power in numbers. The best community partner is a congregation that knows itself as well as its community. This also means knowing when to be involved and when to step back. Whether pursuing partnerships within the congregation or in the community, a special effort must be made to include groups and individuals traditionally marginalized by race, class, sexual orientation, disability, and age.

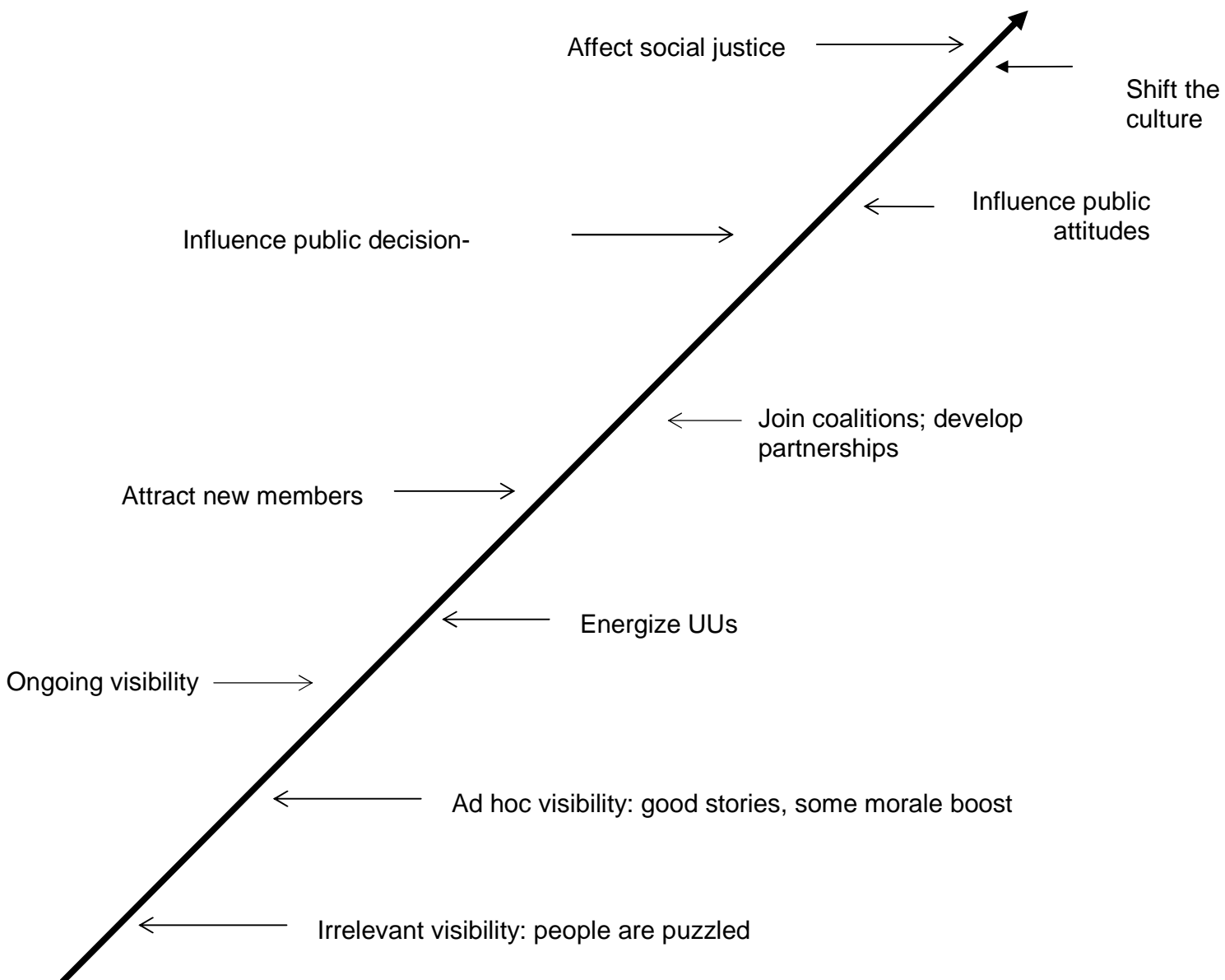
Engage in Reflection and Evaluation. Don't Shy Away from Conflict: Facing controversy quickly and with creativity can make all the difference in interpersonal and congregational relations and provide a strong foundation for justice work. Effective work is often based on consistent and continual evaluation of actions, programs, structures, and leadership.

Thanks to Rev. Victoria Weinstein for her article "Nurturing a Ministry of Activism" and to the Social Justice Empowerment Program

Continuum of Public Witness Impact

This chart can help you to assess the **magnitude** of the impact of your justice work on the world around you. As you become more comfortable with public witness work, you can set your sights higher and higher on the continuum. Also, public witness can **build its own momentum**: the more you get your voice out there, the more impact you can have each time.

Where have your past efforts fallen on this continuum?



Many thanks to Helio Fred Garcia, UUA Media Consultant, for developing this continuum and the following criteria and chart.

VI. UUA Resources

UUA Office for Congregational Advocacy & Witness www.uua.org/socialjustice

- Congregation-Based Community Organizing
- Congregational Best Practices
- Social Justice Empowerment Program
- Public Relations resources from the Office of Information and Public Witness

Susan Leslie
Director
sleslie@uua.org
617-948-4607

Audra Friend
Program Coordinator
afriend@uua.org
617-948-4656

UUA Washington Center Witness Ministries

www.uua.org/justice

- Federal legislative advocacy and resources on priority issues
- *The Real Rules: The Real Rules: Congregations and IRS Guidelines On Advocacy, Lobbying, and Elections*
- General advocacy resources

Rev. Craig Roshaven, Witness Ministries Director
Kat Liu, Witness Ministries Program Associate

croshaven@uua.org
kliu@uua.org

UU State Advocacy Networks and Legislative Ministries uustatenetworks.org

Take Action and Subscribe to Justice Action News Lists at:

www.uua.org/justice

Inspired Faith Effective Action **Workshop Evaluation**

Please rate the following on a scale of 1-5. **Did you leave the workshop with:**

	Not at all			Absolutely	
1. A better sense of the UU theological grounding for justice work, and new or renewed interest in making religious practices part of it	1	2	3	4	5
2. A basic understanding of what accountability means and how to practice it	1	2	3	4	5
3. A desire to learn more about what's already happening in your community and work in partnership	1	2	3	4	5
4. A commitment to working more strategically, using some of the resources in this workbook	1	2	3	4	5

Please give us an overall rating for the workshop:

	Poor			Great	
5. Overall rating for the workshop	1	2	3	4	5

6. What are the three most useful things you learned in this workshop?

- a) _____
- b) _____
- c) _____

7. How can we improve this workshop?

Name (optional) _____ Congregation _____

SIGN ME UP!! My preferred email address is _____

_____ I'd like to receive **Just-Act**, the weekly update from the UUA's Advocacy & Witness about national justice campaigns, congregational resources, best practices, and more!

Please use the reverse side for any additional comments. Thanks for your feedback!