

MONITORING REPORT: ENDS
FEBRUARY 2011

POLICY 1. ENDS for the Unitarian Universalist Association.

1.0 Grounded in our covenantal tradition, the member congregations of the Unitarian Universalist Association will inspire people to lead lives of humility and purpose, connection and service, thereby transforming themselves and the world.

Operational Definition:

We interpret this policy to direct the Administration to provide resources, modeling and support for the deepest values of our tradition, influencing our congregations and their members to commit themselves to relationship and to care for the world. The foundational belief of this administration is that the capacity to create the Unitarian Universalism we long to see already lies in our people. We believe we need to unleash the commitment, compassion, passion, creativity and energy of those in our congregations. When our congregations focus on their mission, when they inspire and channel the religious idealism of our people, lives are transformed, congregations thrive and grow, and we are able to influence the culture with liberal religious values.

Note that this administration's priorities are:

- Growth
- Public Witness
- Ministry for a New Age

All of our decisions, programmatic and budgetary, reflect these priorities.

While many of the indicators of progress towards our Ends are described later in this monitoring report, the highest level indicator of our progress is whether our adult membership, religious education registration, and Sunday attendance is growing over time. Such change is an indicator of the extent to which we can be a credible public voice for liberal religious values in the world and the degree to which our future is bright.

Throughout this entire report are numerous metrics but also many instances of activities that have not been measured or, in some cases, are not measurable. Our goal for the next year is to refine programs and activities that can be measured and metrics set. For example, in May we will begin collecting data about how many congregations use each curriculum in Tapestry of Faith and will do so annually into the future. And the senior staff is in discussion about beginning a process of formal evaluation for much (though not all) of the work of the staff.

Rationale:

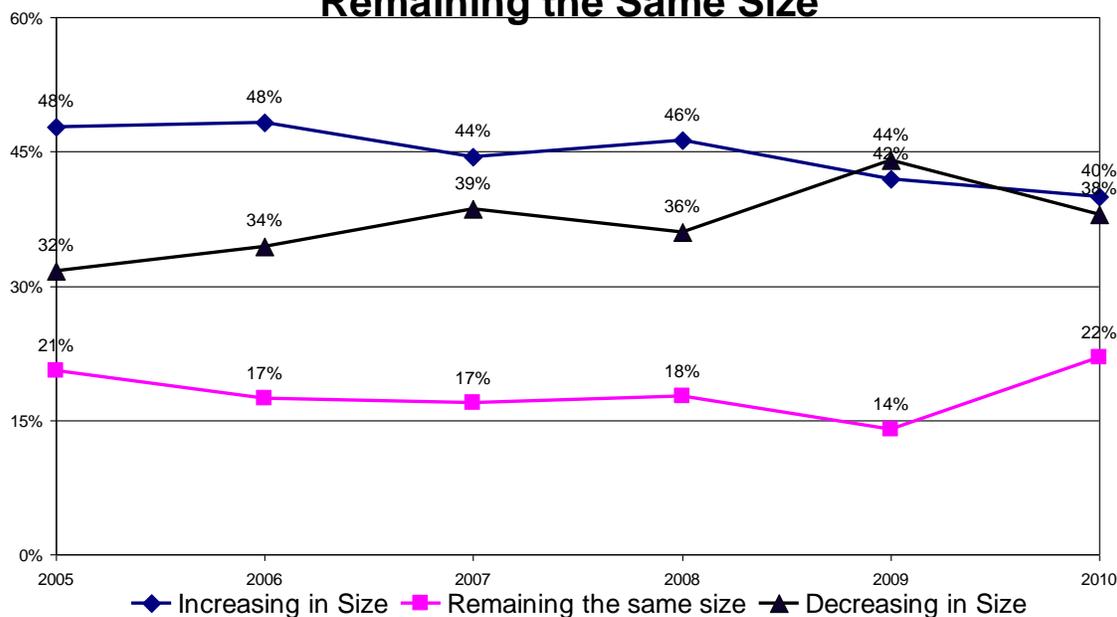
We believe that what is needed in Unitarian Universalism today is ultimately religious and cultural, not “technical.” Our most successful and thriving congregations are distinguished not by techniques or “best practices” but by a spirit of deep compassion and the qualities pointed to in these Ends. Our primary resources, therefore, are directed at transformational work rather than maintenance and our staff is encouraged to understand all of their work as ministry and our congregations as being called to fill the world’s deep hunger for relationship and justice. Ultimately, the test of utility for our programs and work is the healthy growth of Unitarian Universalism.

Supporting Evidence:

[Note that the following information is for the 2-1-09 to 2-1-10 time period. 2-1-11 data will be available soon.]

- Adult membership decreased by 263 adult members or -0.2%.
- Religious Education registrations decreased by 1,262 children or -2.2%.
- Overall average weekly attendance decreased by 396 people or -.004.
- The number of UU congregations that grew was 4,192 or 40%.
- The number of UU congregations that reported flat membership growth was 2,306 or 22%.
- The number of congregations that shrunk in adult membership was 3,982 or 38%.
- New member statistics – During the Congregational Certification process beginning February 2012 we will begin asking congregations to report the number of new members who joined their congregation in addition to the usual total net gain or loss.

Congregations Growing, Shrinking, or Remaining the Same Size



The **Leap of Faith** initiative is a pilot growth program that identifies congregations with great potential for growth, called “aspiring congregations,” and links them with those that have had success with growth, called “mentoring congregations.” Together they create learning communities that share wisdom and experience that benefits both congregations. The information learned is being shared broadly for the benefit of congregations of all sizes all over the continent.

Policy 1.0.1. Congregations that unlock the power that transforms lives.

In our congregations, participants deepen their spiritual lives. People:

- a. Develop a personal spiritual practice**
- b. Participate in meaningful worship**
- c. Learn and practice empowered leadership and generosity**
- d. Find their ministry in the world.**

Policy 1.0.1.2. Our congregations are:

- a. Vibrant, joyful and excited about their ministries**
- b. Intentionally multi-generational and multi-cultural**
- c. Embracing and struggling with issues of oppression and privilege**
- d. Open and inclusive in their outreach and welcome**
- e. Ministries deeply shared by ministers and the laity**
- f. Active participants in ministerial preparation and development**
- g. Growing in membership**

h. Living their mission in their communities

Operational Definition:

We interpret these policies as calling us to provide resources to accomplish the stated goals. The Tapestry of Faith curricula series, all of the work of the Multicultural Growth and Witness staff group, the congregational stewardship office, many books published by Skinner House, the efforts of the field staff, and countless other resources work toward this end.

While the effectiveness of the many staff programs and initiatives that contribute toward the ends of this policy is difficult to measure, UUA staff is initiating an effort to apply the learning's from the Leap of Faith initiative towards this goal. The effectiveness of Leap of Faith is being measured with the assistance of two Brandeis University consultants skilled in the art of non-profit program assessment. The process for assessment will be applied to other programs of the UUA. Until such progress is made, anticipated to occur in the next 12 to 18 months, reliance on the use of or participation in the resources and programs is offered as evidence of progress.

Rationale:

The Multicultural Growth and Witness staff group provides models of and support for justice-based work, acknowledging the importance of providing ministry to a multi-cultural world. Standing on the Side of Love provides a public platform that helps galvanize congregational work on matters of social change and provides an opportunity to work in local communities with others who share our values.

We are committed to seeing the staff of the Association become more diverse itself (our affirmative action analyses are available for direct inspection), to model enthusiasm about possible models of shared ministry, and to understand all of their work as ministry.

Supporting evidence:

Skinner House books provide rich resources for the ministry and spiritual lives of UUs by publishing meditation manuals, pamphlets, children's books and other resources that speak to Unitarian Universalist values and enrich the lives of congregational members. A list of these resources is available online.

Tapestry of Faith, our online religious curricula program. is a series of curricula and other resources for all ages that nurture Unitarian Universalist identity, spiritual growth, a transforming faith, and vital communities of justice and love. It is the second most clicked link on our web site, after the "Visitors" link on the bottom of the index page. Last year there were 799,677 "hits" and this year there have been 1,198,769. Every program for every age seeks the same outcomes, goals developed in partnership with UU religious professionals, lay leaders and youth.

These outcomes include:

Spiritual development – “the longing of the soul”- including a sense of awe, wonder, mystery, the holy and divine; connection with God, nature, life, the universe.

Every workshop or session begins and ends with worship ritual; every session is preceded by “Spiritual Preparation” for the leaders; sessions include many different spiritual practices and ways of connecting with something larger than ourselves.

Ethical development – Becoming our best selves – living our principles and values, strengthening our moral agency, good global citizenship, stewardship of our congregations and our Earth.

Every session has a Faith in Action activity to make the world (or some part of it) a better place. Every session has a core story, many of which are stories of justice work and moral character. A number of programs are entirely focused on social justice and AR/AO/MC work. All programs are developed with an AR/AO/MC lens by a diversity of authors and staff.

Unitarian Universalist identity development – all programs draw from and are grounded in our Principles and Sources, our rich UU history, tradition, and current practice. Tapestry is explicitly UU.

Faith Development – all programs support and encourage making meaning and finding purpose in life; acting on values, reflecting on action; addressing the Big Religious Questions; exploring and articulating theology; knowing what one sets one’s heart to; finding a caring community and a sustaining faith in Unitarian Universalism.

Examples from Tapestry of Faith programs:

- Junior high youth use an Oppression Continuum to work through the stages of becoming an ally in Heeding the Call.
- High school youth are given the tools to plan and lead an interfaith service event in their local communities in Chorus of Faiths.
- Children in K-1 walk the labyrinth to open each session in Creating Home.
- Adults use the Heavenly UU Congregation and Choir as a case study for applying systems theory in Harvest the Power.
- Young children participate in the Audubon bird count in Creating Home.
- High school youth participate in an opening ceremony based on James Luther Adam’s Five Smooth Stones of Religious Liberalism in Place of Wholeness.
- Second and third graders play “courage tag” and explore taking risks in Moral Tales.
- Fourth and fifth graders organize congregational participation in International Forgiveness day in Windows and Mirrors.
- In What Moves Us? adults explore Hosea Ballou’s theological question: Does God want people to be happy?

Our Whole Lives is a series nationally acclaimed comprehensive sexuality education curricula for all ages that is perhaps our best-known religious education offering. It makes clear that sexuality is a religious and spiritual matter. OWL Grades 7-9 is being evaluated by Indiana University and Christian Community, Inc. (a liberal, non-sectarian group despite its name) in a variety of faith communities and some secular sites. It is a three-year longitudinal study though there may be some preliminary observations next

fall. Our Whole Lives Grades 10-12 is facing similar evaluation except Christian Community, Inc. is working with Mathematica, an independent professional evaluation organization.

Worship-related materials consistently top our web analytic charts. **WorshipWeb** is a comprehensive online resource for worship materials available to ministers, lay leaders and congregations; it includes readings, prayers, sermons, and music and is among the most accessed sections of the UUA web site. Within the last year there were 542,239 “hits” to WorshipWeb.

Half our districts currently have in place official mechanisms for religious educators (including youth advisors) and youth to network around issues of youth ministry and leadership.

Forty-two ministers from throughout the Association recently participated in a webinar on **Pastoral Care for Queer Youth** facilitated by Rev. Dr. Monica Cummings.

Approximately 200 UU congregations have participated in the **Social Justice Empowerment Program** since it began in 1993. An independent evaluation of the program conducted in 2009 found that it is highly effective in helping congregations develop social justice programming that it's based in the UU faith and congregational mission. As a result of the workshops and the congregations own pre-workshop assessment provided by the program, congregations develop a social justice structure that has standards and criteria for selection of activities and coalition partners, and is evaluated annually. Beginning in 2012 this program will be delivered to clusters instead of to individual congregations. The 82-page Social Justice Empowerment Program Evaluation (available for direct inspection) showed that the breakdown of social justice activities in which the congregations that participated in the SJEP was:

- Environment/Green Sanctuary (100%)
- Food Pantry/Homelessness (88%)
- Welcoming/BGLTQ (88%)
- Congregation-Based Community Organization (70%)
- Peace (52%)
- Fair Trade (47%)
- Anti-Racism/Anti-Oppression Multiculturalism (41%)
- Health Care (24%)
- Immigration (24%)
- YRUU/Youth (24%)
- Domestic Violence (12%)

The same survey concluded, “The...program [SJEP] is a hugely effective...and makes a long-term impact on congregations and their communities.” We will begin tracking and graphing the number of clusters and congregations participating annually on February 1 each year.

UUA witness ministries staff have created robust resources on immigrant rights and LGBT equality posted on the UU website that includes curricula, study guides, and “how to” guides. Staff gather stories that are featured in UUA communications and drive people to the Web based resources. Open rates for Immigration News and LGBT News average 37% per issue. Since the UUA made immigration reform a priority and joined the New Sanctuary Movement and the Interfaith Immigration Coalition in 2006, the number of congregations engaged in immigration reform has grown from 25 to 300. We will begin tracking and graphing the number of clusters and congregations engaged annually on February 1 each year.

There are currently sixteen congregations participating in the **Multicultural Congregations Learning Community** in which ministers support each other in sharing best practices for creating a multicultural ministry. A Multicultural Growth Consultation will be held on March 14 and 15, 2011, with leaders from eight congregations bringing Appreciative Inquiry feedback, input, and vision from members of their congregations. Participating congregations, particularly those with multicultural staff, report an ongoing transformation of worship and congregational culture with more people of color attending services.

665 congregations representing 65% of all our congregations are recognized as **Welcoming Congregations** by the UUA, up from 50% as of 5 years ago. Because small congregations are less likely to participate, we estimate that over 80% of UUs attend a Welcoming Congregation.

Congregation-Based Community Organizing (CBCO): Since 2002, when the UUA first became involved with Congregation-Based Community Organizing programs (CBCO), the number of congregations participating has doubled from 70 to 140. With its emphasis on building power, ministers and leaders report that this kind of faith-based organizing is the most effective that they have ever been involved in winning affordable housing, health care, criminal justice reform and more.

The **Standing on the Side of Love Campaign** has proven very effective in engaging congregational leaders and others in this approach by creating an on-line community that also takes on-the-ground action. From blogging about congregational community efforts to signing-on to national campaigns through social media, a culture of justice-making through standing with communities that are marginalized has been created. In its first year of operation the Campaign found a place in close to half of UU congregations – from hanging banners on their buildings to using the messaging in services internally and taking it out in the public square in response to instances of exclusion, violence and oppression. Hundreds of UUs joined the Standing on the Side of Love contingent at the national March for Equality in Washington DC in the fall of 2009. When it came time to deliver Cards to Congress in spring 2010 for immigration reform and LGBT equality, cards from over 10,000 from hundreds of congregations, as well as individuals were delivered.

In 2010, approximately 200 congregations participated in the National Standing on the Side of Love event on Valentines Day. In 2011, more participated (precise numbers are not yet available). Additionally, this year SSL received widespread national media attention and an Associated Press story, “Unitarians Turn Tragedy into Lesson in Tolerance,” was published, with almost 60 newspapers throughout the country running that AP story. At present there are 23,647 followers of SSL on Facebook.

Policy 1.0.2. Congregations that live in covenant with other congregations in our Association through:

- a. A strong, articulated sense of UU and community identity**
- b. High expectations of their members**
- c. Full participation in our Associational life**
- d. Networking with each other**

Operational Definition:

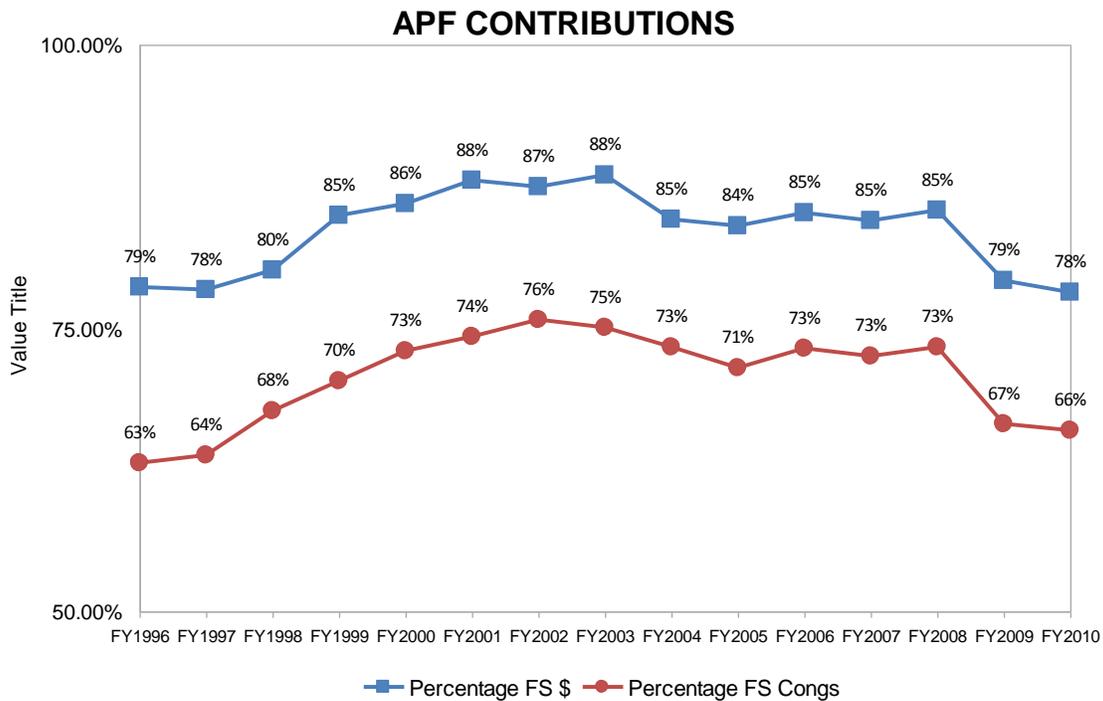
We interpret this policy to call us to find numerous ways of encouraging our congregations to work collaboratively and creatively with one another. Congregations that live in covenant with one another and the larger Association will naturally show evidence of that through their financial support of district and UUA fundraising.

Rationale:

Changes currently underway in districts and regions encourage collaboration and networking among congregations and urge congregations to work together as collaborators in the health and vitality of Unitarian Universalism, teaching and learning from one another. This is happening most specifically in the Leap of Faith growth program. Additionally, our districts are moving quite dramatically toward a regionalized delivery of services that reflects collaboration and mutual support.

Supporting Evidence:

- The percentage of congregations that are Fair Share to the UUA declined from 66.5% to 65.9% comparing FY2010 to FY2009.
- The percentage of Fair Share contributions declined from 79.2% to 78.2 comparing FY2010 to FY2009.
- Contributions to district dues increased in five of our nineteen districts or by 26%.



1.0.3 Congregations that move toward sustainability, wholeness and reconciliation

1.0.3.1 Our congregations answer the call to ministry and justice work:

- a. Grounded in the communities in which they live
- b. Nationally and internationally
- c. With interfaith partners and alliances

1.0.3.2 The public engages in meaningful dialogue and takes action informed by our prophetic voice and public witness.

Operational Definition:

Our commitment to having a public voice that reflects the liberal religious values of Unitarian Universalism has never been greater. We interpret these policies to direct the Administration to make every effort to find platforms for voicing the values of our faith in the public arena in a way that influences discourse and moves toward a more just society and more engagement by our congregations.

The Association itself and many of not most of our congregations have been highly visible and determined in the struggle for marriage equality and significant progress has been made, though the work is far from complete. There is reason to believe that our commitment has influenced outcomes but this cannot be proven. Thus our indicators

reflect our efforts rather than the assumption, however likely that assumption might be, that these efforts have been fruitful.

Rationale:

It should be noted that the last few years have dramatically refined our decision-making processes for decisions about what public matters we engage in. We use these criteria for in the process:

- a) grounding (do we have grounding in G.A. resolutions?)
- b) fit (do we have resources available, e.g., offices, curricula, staff?)
- c) opportunity (will our voice be heard in the public arena?)
- d) accountability (an evaluation of our relationship with communities affected by the issue and of our relationship with coalition partners).

Currently, our three priority issues for social justice are:

- 1) immigration justice
- 2) lesbian, gay, bisexual, transgender equality
- 3) environmental justice.

Supporting Evidence:

Beacon Press publishes trade books to the broader world that capture Unitarian Universalist values, notably in the following fields: race, education, multi-culturalism, LGBT issues, and the environment. We are, for example, the exclusive trade publisher of the Martin Luther King, Jr. papers. It should be noted that Beacon has ended each of the last eight years in strong financial health.

26 youth groups across the nation have shown *The Laramie Project* in their congregations as a public, community event with over six thousand dollars in donations going to local community groups that support queer teens. This project was the brain child of one youth group, which the Youth and Young Adult Ministries Office highlighted in various communications. The Youth and Young Adult Office then helped to facilitate a grass roots movement by connecting groups with one another.

This February, 10 youth-adult teams from around our Association were trained in collaboration with (Eboo Patel's) Interfaith Youth Corp. These teams will then work with interfaith partners on community issues as well as train other congregational teams of youth and adults in their clusters and districts to do the same.

In the last two years, we have participated with other organizations as "sign-ons" to letters, statements, and petitions that align with our social justice issues and have grounding based on General Assembly resolutions; a list of these is available for direct inspection.

We regularly sign on to amicus curiae (friend-of-the-court) briefs in cases that reflect our stated social justice commitments; a list of these is available for direct inspection.

Over the last two years, we have provided media trainings for 157 ministers and lay leaders to help them prepare to be effective voices for justice in the public square. Additionally, a webinar for district staff was made available toward this same end.

Our international work includes 155 UU congregations participating in the **Partner Church Program**. The **Holdeen India Program** serves the poorest of the poor in India and five of our congregations have relationships with groups there.

Faith Without Borders is a program designed by our International Programs Office to assist congregations in creating and sustaining effective ministries of international engagement. Opportunities for engagement include spiritual support, education, justice-making and advocacy, partnerships, faithful stewardship, pilgrimage and witness, and associational leadership. These congregations receive practical assistance and consultation in all stages of their international engagement. In the past month there have been 2,374 visits to our web site.

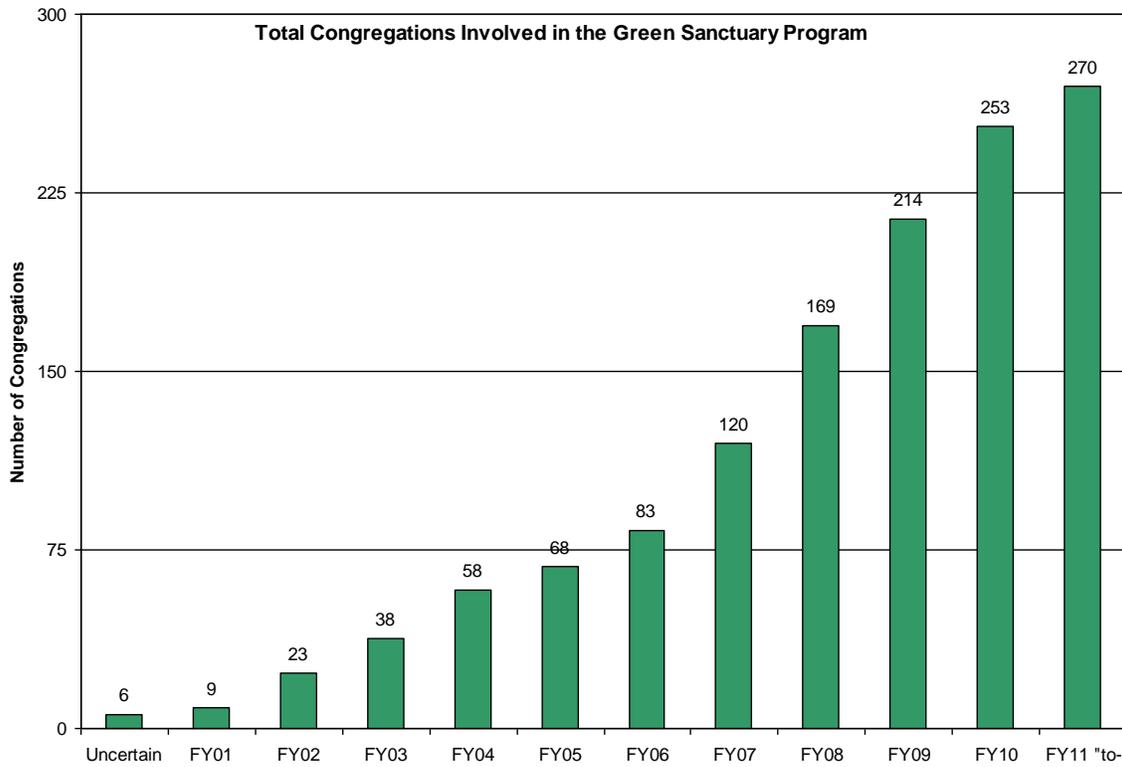
We are working closely with the Unitarian Universalist Service Committee on two specific projects: coordination of our social justice efforts and experiential learning trips. One highly successful trip was taken to Uganda in November and a jointly sponsored trip to Haiti for seminarians will be held this May. Plans are for four such trips to be scheduled each year and a survey on experiential learning resulted in 1200 responses interested in participating.

We have begun negotiations with the UU-United Nations Office that are likely to result in the UU-UNO becoming part of the UUA, enhancing our international scope and providing UUs the opportunity to be more involved in international issues.

In the last year, our most dramatic public witness involved demonstration and arrests in Phoenix in July where almost 200 Unitarian Universalists came to raise their voice in outrage over immigration injustice and 29 UUs were arrested (of a total of 82 arrests). Anecdotally, but of importance: well-known and respected activist, Kim Bobo, the Executive Director of Interfaith Worker Justice, wrote an article about the arrests in Phoenix on July 29. A portion of her article said, “The religious community was engaged and integral to most of the local organizing Although most faith bodies and denominations have very strong statements on immigration reform, those same denominations did not activate people. With one glaring exception—the Unitarian Universalist Association. Of the several hundred religious leaders who showed up, only the UUA seriously committed staff, money, and organizing talent to the struggle. . . . the Unitarian Universalist Association offered an example in Arizona of what can and should occur. Let’s hope others will ‘go and do likewise.’ ”

The **Green Sanctuary Program** was designed to give roots and wings to the vision that we can create a world in which all people make reverence, gratitude, and care for the living Earth central to our lives. Voluntary participation in the Green Sanctuary Program provides a framework for congregations and congregants to proclaim and live out their

commitment to the Earth. The total number of congregations involved in the Green Sanctuary program has increased from 9 in 2001 to 253 in 2010.



For more than 40 years, the UUA has committed itself to **Socially Responsible Investing (SRI)**. The UUA is constantly engaged in SRI activity, including shareholder resolutions, community investing, affordable housing and other justice initiatives. The UUA Socially Responsible Investing plan focuses on four principle issues: Sexual orientation/gender identity non-discrimination; Climate change and sustainability reporting; executive compensation; and Human Rights. Significant change has come from these efforts.

Outcomes in Shareholder Advocacy and Corporate Engagement:

- The UUA has partnered with several other faith-based and SRI investors to write to the CEOs of the country’s largest corporations, asking them to take a public policy position on immigration. We are making the argument that immigration reform including a path to citizenship, avenues for migrants to work legally, and respect for families is good for business and essential for the long-term economic health of the United States.
- We have partnered with the NY City Office of the Comptroller to represent their pension funds at national corporate annual meetings, where resolutions on issues such as LGBT rights will be presented.
- We continue to dialogue with companies with whom we have filed resolutions.

- We are pressing our investment consultant, NEPC, to attend more closely to SRI/ESG investment opportunities.
- We have arranged for UU representatives to attend corporate annual meetings where we have offered shareholder proposals.
- We are pressing our investment consultant, NEPC, to attend more closely to SRI/ESG investment opportunities.
- We have arranged for UU representatives to attend corporate annual meetings where we have offered shareholder proposals.

1.0.4. These Ends are all of equal importance and are to be achieved within a justifiable cost, with their priority set by the president.

Operational Definition:

This policy calls for each section to be of equal importance, with the understanding that priorities are to be set by the president. Our priorities and thus our budgeting have been and are guided by the three goals of this administration:

- Growth
- Public Witness
- Ministry for a New Age

Rationale:

With Leap of Faith, we have moved toward a model of evaluation for each new project we begin and future Ends monitoring reports will begin to illustrate that. As you will see scattered through this Ends monitoring report, we have begun capturing metrics for future analysis.

Supporting evidence:

Supporting evidence for these Ends is embedded in the reports shown above.

Conclusion:

We report non-compliance; these Ends are open-ended and “success” must be measured by continuing progress and ongoing and increasing measurement and evaluation.