

2021 CERTIFICATION



Annual Certification

Worksheet to help congregations
prepare for certification questions



Introduction

We recognize that during this pandemic it may be difficult or impossible for your congregation to accurately answer many of the certification questions. We encourage you to do your best as it's important for the UUA to get a picture of what's happening within our congregations, especially now.

Each year, member congregations report annual membership, financial and other data figures to the UUA through the certification process. The UUA uses this information to determine Annual Program Fund (APF) contributions, proportional delegates for elections and General Assembly, and to compile data about overall indicators and trends within Unitarian Universalism.

Remember that rather than requiring a password, anyone from your congregation who has the secure link to your unique page can input information. Secure links to your unique account page will be sent via email to the congregational data administrator. You can fill out each section independently, and your account page will tell you when each section is complete.

Thank you for your help in making this year's certification a success. If you have feedback or suggestions about the updated process, please email data_services@uua.org. We look forward to hearing how we can improve this process.

Updates

New questions added

Section 3 about your congregation's Rental/Building use income;

Section 4 about virtual/online participation in your congregation (instead of the usual Average Weekly Attendance question);

Section 6 includes several questions related to the pandemic and some questions to aid the Article II Study Commission, Commission on Institutional Change Implementation Team, and Safe Congregation Team.

For more information, visit uaa.org/certify.

How to use this worksheet

Print a copy of this worksheet and use it to gather the information that is needed to certify your congregation's information. All information must be submitted online by the deadline: Wednesday, February 3, 2021 at 5 p.m. PT.

To submit this information, go to uaa.org/certify and log in to your congregation's Data Services account and submit your data online before the deadline.

The annual Certification for congregations includes six sections:

1. **Congregation Directory Listing** – Verify your congregation's information is correct in the Find-a-Congregation Directory on UUA.org.
2. **Leaders Listing** – Verify your congregation's contacts are correct.
3. **Financial Statistics** – Provide your Total Expenses and other financial statistics from your congregation's recently-ended fiscal year.
4. **Membership and Attendance** – Update your membership, attendance, and demographic statistics to reflect current totals.
5. **Diversity Questionnaire** – Take a brief survey on the makeup of your congregation & leadership to support racial, ethnic, and cultural diversity reporting.
6. **Congregational Questionnaire** – A survey of questions to help the UUA gain a sense of what is important in the life of your congregation, how you are dealing with the pandemic, and how we can help support your work.

Use the following pages of this Worksheet to review questions and collect information from each of these sections before submitting them online.

Section 1: Congregation Directory Listing

Verify that the UUA has your congregation's current location and contact information on file. This information appears on the Find-a-Congregation page on UUA.org for visitors.

In this section of the annual inventory, you will be asked to review basic contact information about your congregation and update any of it if necessary. These items include the congregation's name, mailing address, meeting address, business phone, business email, website, and accessibility information.

Section 2: Congregation Leaders Listing

Verify that the UUA knows who your congregation's current leadership is. Keeping this information updated ensures your congregation's leaders are receiving updates and resources from the UUA.

This listing dictates who's authorized to make changes and access information about your congregation. Administrators, Presidents, Treasurers, & Ministers receive full access to MyUUA, Certification, Credentialing, and Ministry Search systems. These leaders along with other positions are listed publicly on UUA.org's Find-a-Congregation search tool.

In this section you are asked to provide the name, role, and contact information for each person who is in one of the following roles: Administrator, Director of Music, Minister, President, Religious Educator, Treasurer, & Vice President.

NOTE: You can manage other roles and positions in your congregation along with congregational members via MyUUA. <https://my.uua.org>

Section 3: Financials

Your congregation will be asked to submit financial statistics from your congregation's **most recently-ended fiscal year**. (For example, if your congregation runs a July-June fiscal year, you should be reporting all financial information as related to the time period July 1, 2019-June 30, 2020). These figures are used to calculate Annual Program Fund contributions and to provide the UUA, regions, and districts a gauge on the financial health of congregations. Use the notes that appear after the table below for explanations as to how to answer each of the eight Financials questions.

| | |
|---|--|
| 1. Total Expenses | |
| 2. Denominational Contributions ONLY | |
| 3. Capital Expenses ONLY | |
| 4. Total Pledge Income | |
| 5. Total Individual and Family Pledging Units | |
| 6. Rent or Own Primary Facility | |
| 7. Endowment and Reserves | |
| 8. Long-Term Debt | |
| 9. Rental/Building Use Income | |

1. *Total Expenses*: Include all costs of running your congregation for one year, such as salaries and wages, rent, mortgage payments, insurance, legal fees, utilities, supplies, denominational contributions, and capital expenses.
2. *Denominal Contributions*: Please provide the amount contributed to the Annual Program Fund in your most recently closed fiscal year.
3. *Capital Expenses*: Of the expenses listed above, how much was from capital expenses? What's considered a capital expense varies, but could include mortgage principal, or other capital expenditures not related to regular expenses. Rental fees are NOT considered capital expenses.

4. *Total Pledge Income*: The total amount of formal pledges that were given by members and friends.
5. *Total Number of Individual and Family Units Making Formal Pledges*: Many families are considered a single pledge unit. However, if John Smith pledges \$1,000, and his spouse pledges \$1,000, and the pledges are recorded separately, then they should be counted as two pledging units.
6. Does your congregation own or rent its primary facility?
7. **NEW QUESTION:** *Rental/Building Use Income* – What is the income (if any) the congregation generated from building rentals and use fees by outside parties?
8. What is the dollar value of your congregation's *endowment and reserves* at the close of its last fiscal year?
 - *Endowment* – Funds held in long-term investment accounts including restricted, unrestricted, and board-restricted funds. The funds may be in accounts directly held by the congregation or in separate entities such as foundations or trusts established primarily for the benefit of the congregation.
 - *Reserves* – Funds held for emergencies, future building projects, and/or capital improvements but not for regular operations.
9. How much did your congregation owe in *long-term debt* at the close of its last fiscal year? (Including mortgages, bank debt with multi-year payment schedules, and bonds or loans from congregants and friends. This does not include credit card debt or other loans due in one year or less).

Section 4: Membership

Your congregation is asked to submit its current membership count and attendance statistics. These figures provide the UUA and regions with data on Unitarian Universalist growth and participation. See below for how to answer these membership questions.

| | |
|---|--|
| Number of Members | |
| Number of Total Members (for Multi-Denominational/ Federated Congregations Only) | |
| Non-Member Friends | |
| Virtual Participation – ALL AGES | |
| Virtual Participation – Children & Youth ONLY | |
| Religious Education Enrollment | |

1. Current Members: This should be your congregation’s **current** number of members. If your congregation is not actively tracking membership due to the pandemic, we recommend using your reported membership from the prior year. (*Note: If your congregation is a multi-denominational/federated congregation, do not enter your total members; instead, enter only the number of members who identify as Unitarian Universalist*).
2. Multi-Denominational/Federated Members: This question is for multi-denominational/federated congregations only (*UUA congregations who do not have multiple denominational affiliations should skip this question*). Multi-denominational/federated congregations should report their total membership in this field.
3. How many Non-member Friends do you estimate are currently involved in or contribute to your congregation but are not members?
 - *Do include:* non-members who financially contribute; parents of students enrolled in religious education; former members who have moved away but still retain a connection such as continuing to receive your newsletter; participants in outreach programs such as a college campus group or military ministry group that your congregation sponsors.
 - *Do not include:* people served by a community social justice program of your congregation that have no other connection to the

congregation; attendees at events for which another organization has rented your building; families whose children go to a pre-school program in your building and have no other connection to the congregation.

4. **NEW Question:** Virtual Participation – All Ages – Select the range that aligns with your best estimate for the number of people (of all ages) who are engaging with your congregation on a weekly basis in any of its virtual/online activities?
5. **NEW Question:** Virtual Participation – Children & Youth Only – Select the range that aligns with your best estimate for the number of children and youth (ranging in age from nursery through high school) who are engaging with your congregation on a weekly basis in any of its virtual/online activities?
6. How many people (ranging in age from nursery through high school) are currently enrolled in Religious Education? This total should equal the number of children and high school youth who are registered within the congregation’s religious education program. For safety reasons, the UUA suggests all children be officially registered. If you need help designing a registration system that works for you, please contact your District or Regional staff. If there are children or high school youth who attend Religious Education programs but are not yet officially registered, you may include them in your total count. Please consider registering all participants so that reported totals in the future will include only these children and high school youth who are officially registered.

NOTE: Please enter zero (0) if your congregation did not hold Religious Education programming due to the pandemic.

Section 5: Diversity Questionnaire

The UUA is asking congregations to continue to confidentially report on the racial, ethnic, and cultural diversity of their members and leadership teams.

This information will help the UUA analyze the impact of racial disparities in Unitarian Universalist faith communities. Results of this survey will be publicly reported, protecting the anonymity of individual congregations and leaders.

In this questionnaire, the term “people of color” may include people who are of African descent, Asian/Pacific Islander, Caribbean, Latinx, Hispanic, Middle Eastern/Arab, Native/American Indian or other indigenous ancestry, and multiracial.

Please answer the following questions to the best of your ability and please include your congregations' members AND non-member friends when considering these questions.

1. Of your congregation's members and non-member friends, what percentage do you estimate identify as people of color?
 - Those who identify as people of color may include African descent, Asian/Pacific Islander, Caribbean, Latinx, Hispanic, Middle Eastern/Arab, Native/American Indian or other indigenous ancestry, and multiracial.
 - Use the dropdown menu to select the percentage range that best describes your congregation's members. For convenience we note the members and non-member friends each range represents.
 - Congregations who do not want to provide this information may opt out by checking the "We do not wish to provide this".

2. Of your congregation's members and non-member friends, what percentage do you estimate identify as lesbian, gay, bisexual, transgender, nonbinary, or queer (LGBTQ)?
 - Use the dropdown menu to select the percentage range that best describes your congregation's members. For convenience we note the members and non-member friends each range represents.
 - Congregations who do not want to provide this information may opt out by checking the "We do not wish to provide this".

3. Staff diversity
 - How many staff members do you currently have (including full and part time)?
 - Of those staff members, what number identify as people of color?
 - How many of those staff members who identify as people of color are clergy or other religious professionals?
 - How many of those staff members who identify as people of color are administrative or facilities staff?

4. Leadership Diversity
 - How many members are on your Board of Trustees (also called governing board, standing committee, etc.)?

- Of those Board members, what number identify as people of color?
5. Has the leadership in your congregation who identify as people of color changed over the past year? If so, how much?
 - Use the dropdown menu to select the percentage range that best describes your congregation's leadership change.
 6. What changes has your congregation made in the past year, if any, to increase the racial and ethnic diversity of your congregational staff and volunteer leadership (e.g. recruitment or leadership development programs, hiring practices)?

Section 6: Congregational Questionnaire

We'd love to learn more about your congregation. This survey of 17 questions will help the UUA gain a sense of what is important in the life of your congregation and how we can help support your work.

1. In the past year, how helpful has the UUA (including your regional staff) been to your congregation in advancing its mission and addressing key challenges? On a scale 1-5: Not at all helpful, somewhat unhelpful, neither helpful nor unhelpful, somewhat helpful, very helpful.

2a. On a scale of 1-10, how would you rate the conflict in your congregation in the past year? 1= Aware of conflict, and is well within healthy range; 5 = conflict is definitely there and starting to distract us from our mission and impair community; 10 = the conflict is causing the congregation to implode.

2b. What team or committee in your congregation helps congregants engage conflict in a healthy, faithful way?

- Committee on Ministry
- Healthy Congregations Team/Right Relationship Team
- Board
- None
- Other (please specify)

2c. Contact email for the chair of this team/committee.

3. Which of the following are currently addressed by Safe Congregation, Board, Personnel, or other policies in your congregation?

- Behavioral covenant/right relations process
- Building safety and/or emergency preparedness

- Children or classroom safety
- Disruptive behavior
- Employee conduct and/or sexual harassment
- Limited access agreements
- Safety guidelines for gathering in person
- Youth safety
- Other (please specify)

4a. To what extent do your congregation's mission and strategic goals drive and challenge the work and ministry of your congregation? On a scale of 1-5: Not all, very much.

4b. The Article 2 Study Commission is seeking to assess how well the Purpose and Principles of the Unitarian Universalist Association reflect those of our member congregations. Please attach, if applicable, the covenant, mission, vision, purposes, and/or ends of your congregation.

pdf, doc, docx, txt, and rtf files accepted.

5. Has your congregation collaborated with another UU congregation in your area or cluster on any of the following over the past year?

- Community event
- Informal conversation or support
- Religious education programming
- Shared project or program
- Shared staffing arrangement
- Worship/Sunday Services
- Other (please specify).

5b. What collaborative practices have you started due to the pandemic?

6. Has your congregation publicly acted in support of any of the following social justice issues in the past year?

- Accessibility/Disability Rights and Advocacy
- Climate Justice/Environmental Sustainability
- Combating Criminalization
- Economic Justice/Classism
- Housing/Homelessness
- Immigration Justice
- LGBTG+ Equity
- Racial Justice/ Black Lives Matter/ Countering White Nationalism
- Reproductive Justice
- Voting rights/ Voter Engagement
- Other (please specify)

7. Has your congregation engaged in any of the following multicultural or anti-racism learning programs in the past year?

- Accessibility and Inclusion Ministry Program (AIM)
- Beyond Categorical Thinking
- Building the World We Dream About curriculum
- Conversations for Liberation
- Dismantling White Supremacy workshops/ resources
- Intercultural competence and sensitivity
- Mosaic Makers
- Welcoming Congregation refresher
- Other (please specify)

8. Which of the following has your congregation used to help lead faith development or religious education this year?

- 2020-21 UUA Common Read “Breathe: A Letter to My Sons” by Imani Perry
- 2019-20 Common Read “An Indigenous Peoples’ History of the United States”
- Braver/Wiser
- Our Whole Lives curricula
- Our Whole Lives facilitator trainings
- Renaissance Module faith development training
- Small group ministry guides
- Tapestry of Faith curricula

- Theme-based ministry resources
 - Worship Web
 - Other (please specify)
9. What online congregational leadership and management resources or materials has your congregation used in the past year via UUA.org?
- Communications, website, or social media resources
 - Congregational compensation consultants
 - Congregational social justice organizing resources including UU the Vote
 - Faithify crowd funding platform
 - Human resources or church management materials and guides
 - InSpirit Books and Gifts/ UUA Bookstore
 - Leadership development, Leader Lab, or governance resources
 - Outreach, growth, and membership guides or materials
 - Stewardship For Us consultants
 - Stewardship or fundraising resources
 - UUA blogs and social media
 - UUA email lists (e.g. UU Leaders, REACH)
 - Other (please specify)
10. What services, resources, or programs from your UUA region has your congregation or members used or participated in during the past year?
- Consultation with a regional UUA staff member
 - Meeting, startup, or retreat in your congregation facilitated by regional staff
 - Online courses through the UU Leadership Institute
 - Regional or district assembly
 - Regional or district in-person leadership school or training
 - Regional or district newsletter
 - Regional or district youth events and conferences
 - Webinars or workshops
 - Zoom license discount
 - Other (please specify)
11. Does your congregation host an identity-based caucus or covenant group/circle for any of the following:

- Asian/Pacific Islander
- Black/Indigenous/People of Color
- Black/African Diaspora
- Indigenous/First Nations
- Individuals living with Disabilities
- Latinx/Hispanic
- Men/Male
- Women/Female
- Transgender/Non-Binary
- LGBTQIA
- White/Caucasian
- Youth
- Young Adults
- Allies for Racial Equity
- Allies for Gender Equity
- Allies for Immigration Equity
- Allies for LGBTQIA Equity
- Allies for Disability Equity
- Allies for Indigenous Sovereignty
- Other (please specify)

Payment Protection Program

We'd like to have a fuller picture of how our congregations have been impacted financially due to the pandemic along with how much UUism has received via the PPP program. Please answer these to the best of your ability.

12a. Did you apply for a Payment Protection Program (PPP) loan?

- Yes and it was forgiven
- Yes, and we did not receive the loan
- Yes, and we chose not to take the loan
- Yes, and we did not apply for forgiveness
- No
- Other (please specify)

12b. If yes above, how much did you receive?

13. What financial factors changed in the last year (setting aside PPP loans) and how did your income shift this year?

Pandemic

These questions will help the UUA and the Regions get a better picture of how congregations are adapting to the pandemic.

14) What platforms/services have you started using during the pandemic?

15) Which of the following aspects of congregational life have you done virtually?

- Worship
- Religious Education classes
- Small Groups
- Adult Faith Development
- Community Meals
- Social Justice Activities
- Family ministry programs

16) What does virtual worship look like in your congregation? Please include the frequency are you holding worship and if you are you doing joint worship with other congregations.

17) What is one thing you would like more help with from the UUA?