Your congegation’s Name here | date/version

#### Congregational Self-Assessment

## Name of team / committee doing the assessment

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# Introduction

The following tool is designed to help congregations assess their own level of development and identify areas for improvementin common areas of congregational health and vitality.

This is a work in process and – in the spirit of continuous adaptation – will be regularly refined and updated. (See the cover page for the revision date.) Please send suggestions to [conglife@uua.org](mailto:conglife@uua.org).

This tool was adapted from a number of sources, including McKinsey and the Center for Youth and Communities at Brandeis University. As part of the 2010-2015 Threshold Congregation program, the Central East Regional staff worked with Della M. Hughes, a consultant from Brandeis University to develop the basic format and content that. This version was created in 2022 by members of the UUA Congregational Life Staff team.

# How to Use this Assessment

The Assessment includes topics that typically impact congregational health and vitality. An assessment team\* (comprised of members of your congregation’s leadership) meet to discuss each topic, either in a retreat setting, or spread out over the course of one or two years.

The assessment team determines your congregational capacity for each topic, reviewing the criteria presented on a five-point continuum. Additionally, you will want to cite one or two examples of evidence illustrating how the congregation is or is not meeting the criteria and then decide collectively on a rating.

The assessment provides a roadmap for areas of improvement. More importantly, it provides a benchmark for future assessment teams, who can track progress by comparing current and past assessments so you can better see larger trends in congregational health and vitality.

\* Assessment teams should be comprised of trusted and committed leaders. Large congregations may delegate this task to staff. Mid-size congregations may have a [Committee on Shared Ministry](https://bostonuua-my.sharepoint.com/leaderlab/robert-lathams-committee-ministry-model) take on this role. In small congregations the board may take responsibility or delegate it to an ad hoc committee.

# Covenant

## Range of Capacity

1. Limited articulation and expression of the covenant of the congregation; covenant is known by very few in the congregation or rarely referred to as an individual or collective relationship guide.

2.

3. Covenant is known by many in the congregation; The covenant is sometimes referred to as a guide.

4.

5. The covenant is widely known and understood throughout the congregation; covenant clearly reflects the congregation's values, purpose, and theology; covenant is frequently referred to as a guide for individual and collective relationships in non-legalistic ways.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Covenant.

# Mission and Vision

## Range of Capacity

1. Limited expression of the mission and vision of the congregation; mission/vision is known by very few in the congregation or rarely referred to as a guide in making decisions, setting policies, and developing programs.

2.

3. Mission/vision known by many in the congregation; mission/vision is sometimes referred to as a guide in making decisions, setting policies, and developing programs.

4.

5. Mission/vision is widely known and understood throughout the congregation; mission/vision clearly reflects congregation's values and purpose; mission/vision is frequently referred to as a guide in making decisions, setting policies, and developing programs.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Mission and Vision.

# Governance (Decision-Making)

## Range of Capacity

1. A small group controls decision-making in the congregation. Or it is not clear how decisions are made. Expenditures are approved by the board on a case-by-case basis. Individuals know how things are done, but new people do not. The bylaws are extremely detailed and/or out of date.

2.

3. There is some clarity about who is empowered to make decisions among the leadership. Committees and teams have charges/descriptions and can spend their allocated budgets without additional permission. Committees are functioning, but occasionally step on each other’s toes. The bylaws are up to date, and the board uses policies and procedures to provide institutional memory.

4.

5. There is good clarity around who gets to make what decision. Decisions happen close to where the work is happening. Committees and teams are energized and effective.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Decision-Making.

# Governance (Fiduciary Duty)

## Range of Capacity

1. There are no policies for safety or financial management. Committees don’t feel they are accountable to the governing board.

2.

3. The congregation has safety and financial policies, but they are not fully understood or followed. Exceptions are made when people cause a fuss.

4.

5. Safety and financial safeguards are integrated into congregational life. There are annual fire drills and emergency plan reviews. Anyone working with children, youth or money is required to have background check, and to have at least 2 unrelated people working together.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Fiduciary Duty.

# Shared Ministry

## Range of Capacity

1. Lay people are invited to do a reading or provide rides or casseroles to people in need. New people are expected “pay their dues” by volunteering with existing committees. New initiatives are discouraged

2.

3. Some lay members serve in roles that craft worship or provide pastoral care, but there are not ongoing trainings, programs or opportunities for new people to become involved. People who have ideas and energy need permission to do anything new.

4.

5. There are many opportunities for lay ministry, supported by regular trainings and program offerings. People feel like their contribution is making a difference in the world. There is a clear and fair process for new initiatives, based on mission and capacity.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Shared Ministry.

# Trust

## Range of Capacity

1. Decisions seem to come out of nowhere. Members and friends ignore or even sometimes challenge decisions. People talk about “the board” as if it is separate from the church. A regular-meeting group (or more) of longer-term members pick apart board decisions. Leaders tend to burn out and/or disappear. When a leader makes a mistake, people take out their feeling on the leader, and the leader often feels they have to leave the congregation.

2.

3. People regularly complain about board decisions. The nominating committee has difficulty finding people to serve on the board. People without experience or aptitude are asked to serve on the board. When a leader makes a mistake, they feel the disapproval and disappointment of others, but no one talks about it.

4.

5. Decisions are made with transparency after dissenting voices have been heard. New initiatives are rolled out slowly, with adjustments along the way. When a leader makes a mistake, the focus is on what can be learned. The leader feels supported and continues in their role.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
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| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Trust.

# Continuous Adaptive Learning

## Range of Capacity

1. The leaders of the congregation do not feel the need to engage in training or seek guidance about how to best run the church. Leaders do not hold each other accountable to their covenantal relationships and leadership responsibilities.

2.

3. The leaders of the congregation send new and potential leaders to workshops, leadership school and other training and will occasionally attend such events themselves. There is some accountability among leaders to their covenantal relationships and leadership responsibilities. (E.g., an annual ministry assessment).

4.

5. The leaders of the congregation model vulnerability by not pretending to have all the answers and regularly participate in training and learning opportunities. Leaders hold each other accountable to their covenantal relationships and leadership responsibilities on an ongoing basis.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Continuous Adaptive Learning.

# Navigating Change

## Range of Capacity

1. Change is viewed as a threat to the status quo of the institution and resistance is common.

Leaders strive to maintain a sense of equilibrium and often make decisions without broader input, seek a technical fix to challenges, and are less adept at managing their own emotional reactivity.

2.

3. Change is viewed as inevitable, but resistance is still present. Leaders strive to manage anxiety and shift the culture to one more focused on an articulated mission and vision. Leaders seek consensus through healthy communication practices, are able to tolerate an appropriate level of discomfort in themselves and others, and view tolerance to change as an important step in the maturational growth of the congregation.

4.

5. The leaders of the congregation model vulnerability by not pretending to have all the answers and regularly participate in training and learning opportunities. Leaders hold each other accountable to their covenantal relationships and leadership responsibilities on an ongoing basis.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Navigating Change.

# Conflict

## Range of Capacity

1. Conflict is avoided at all costs. Leaders attempt to keep everybody happy and smooth things over when things go awry. Leaders may be conflict averse or may find themselves taking sides. Leaders may also experience other kinds of manipulation by congregants holding inappropriate levels of informal power. Triangulation and parking lot conversations may be a common form of communication.

2.

3. Conflict is viewed as unwelcome but necessary and it is understood that some members may have good reason to avoid conflict. Leaders attempt to manage conflict by creating healthy processes for responding to conflict and providing intentional opportunities to engage in healthy debate over issues. Leaders focus on their own functioning, engage in deep listening, and have an understanding of conflict as a part of healthy system functioning.

4.

5. Conflict and conflict avoidance are seen as a healthy consequence of living in a diverse community where differences are acknowledged and even celebrated. Leaders attempt to engage a variety of identities in the work of the congregation, with the assumption that conflict is a natural process in a relational system and that being able to transform conflict into dialogue is the highest goal. Leaders show gratitude, focus on strengths, seek to understand a variety of viewpoints, and view conflict as an opportunity for discovery and learning through genuine dialogue. Engaging conflict is understood as faith formation, offering strategies and tools for congregants to manage and engage natural conflict that arises in pluralistic community.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Conflict.

# Leadership Development

## Range of Capacity

1. The leadership pool hasn’t changed much in the past 10 years.

2.

3. Some new leaders are cultivated and offered opportunities such as annual orientation sessions or leadership retreats. A few young adults and/or people of color are in leadership roles.

4.

5. A highly functioning leadership development team identifies recruits and trains new (and existing) leaders and helps match them to roles and ministries. Young adults and people of color are actively recruited into leadership roles and feel supported by other leaders and the congregation.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Leadership Development.

# Connection with Wider UUA

## Range of Capacity

1. There is limited participation in cluster, regional or national events and activities; general disinterest on the part of the congregation to connect with other congregations or with cluster/region/national association.

2.

3. There is some participation in cluster, regional or national events and activities; leadership understands the importance of connecting with other congregations or with cluster/region/national association.

4.

5. There is widespread participation throughout the congregation in cluster, regional or national events and activities; the congregation is routinely represented at workshops, conferences, etc. and reaches out, mentors or networks with other congregations in the area.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Connection with the Wider UUA.

# Culture of Welcoming and Belonging

## Range of Capacity

1. There is limited willingness of the congregation to create a culture of welcoming to visitors and new members; the congregation leaves the task of welcoming to designated membership/hospitality groups. Visitors who are different are ignored or feel overwhelmed by the attention.

2.

3. Many members of the congregation recognize their responsibility to welcome visitors and new members; the task of welcoming is shared by more than just those who belong to designated membership/hospitality groups.

4.

5. The congregation exhibits a strong culture of welcoming where all members of the congregation recognize their responsibility to welcome visitors and new members; the congregation is intentional in creating a true sense of belonging.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Culture of Welcome and Belonging.

# Diversity, Equity, and Inclusion

## Range of Capacity

1. There is a general lack of commitment to diversity, equity, and inclusion. Only a few members have attended antiracism, anti-oppression, and/or multiculturalism trainings.

2.

3. There is a general commitment to diversity, equity, and inclusion; including a committee or team dedicated to antiracism, anti-oppression, and/or multiculturalism. There is interest in studying the COIC report "Widening the Circle of Concern" and/or the 8th Principle initiative. The is general understanding of the concepts of white privilege, cultural misappropriation, and institutional racism.

4.

5. There is a strong congregation-wide commitment to diversity, equity and inclusion. The term "white supremacy" to describe the lived experience of BIPoC people is understood and accepted. This has resulted in a large percentage of leaders participating in antiracism, anti-oppression, and/or multiculturalism trainings and, in response, institutional practices, worship, and/or faith development programs have been examined and transformed to dismantle inherent systems of oppression.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Diversity, Equity, and Inclusion.

# Faith Development

## Range of Capacity

1. Faith development is little understood. Programming is limited and viewed as the purview of religious education staff and volunteers. The goal of leadership is to provide resources that support a system of separate committees that see their work as distinct from one another.

2.

3. Faith development is a vital ministry for all ages within the congregation. Intergenerational events and relationships are valued and learning opportunities for a variety of ages exist. The goal of leadership is to focus resources by intentionally connecting learning and faith development to the congregational mission and by ensuring appropriate staffing levels are in place. Leaders are engaged in spiritual practice and learning to deepen their own skills and to equip them for their work.

4.

5. Faith development is viewed as a natural part of the human experience for all ages, stages, and abilities throughout the lifespan. Experiential learning opportunities that encourage and nurture faith development are designed for all ages, stages, and abilities throughout the lifespan.

Congregations recognize and celebrate rites of passage and milestone events throughout the lifespan. The goal of leadership is to work towards a vision of an authentically diverse community where differences in age and stage are explored, honored, and celebrated. Leaders model a practice of continual learning and actively mentor others.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Faith Development.

# Family Ministry

## Range of Capacity

1. There are no families involved, or there are a few families who come occasionally. There is no regular programming for children, youth, or families. Parents do not feel welcome in worship when their children are present.

2.

3. The congregation has a part time paid religious educator, or a dedicated group of energetic volunteers who offer programming for children and youth. Family-Friendly events are regularly offered. There is a regular time for all ages and monthly intergenerational services.

4.

5. Families are fully integrated into the life of the church. Intergenerational relationships organically develop from spending quality time together. Sunday mornings include all-ages worship and age-appropriate faith development.

## What is your congregation’s current capacity?

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1 = Low-to-Basic Capacity | **1** | **2** | **3** | **4** | **5** | 5 = High Level of Capacity |
|  |  |  |  |  |

## Anecdotal Evidence

Please share one or two examples that provide "evidence" of how your congregation is meeting the criteria listed for your rating on Family Ministry.

# Debriefing Questions

1. What surprised you in your assessment?
2. What in the assessment is in alignment with the narrative you tell about yourselves?
3. Where is the congregation’s longing/desire?
4. Where is the congregation feeling at their authentic selves?
5. What is Spirit inviting you to?