

2024 CERTIFICATION

WEDNESDAY, JANUARY 3, 2024 – MONDAY, FEBRUARY 5, 2024



Annual Certification

Worksheet to help congregations
prepare for certification questions



Introduction

Thank you for your help in making this year's certification a success. 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) requests, apportion delegates for elections and General Assembly, better understand congregational needs, and compile data about overall indicators and trends within Unitarian Universalism.

We recognize that it may be difficult to accurately answer many of the certification questions. Congregations are encouraged to answer questions as best you can as it's important for the UUA to get a picture of what's happening within our congregations.

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.

For more information, visit uua.org/certify.

2023 Certification Report

See the aggregated results from last year's certification process at:
<https://secure.uua.org/certification-report/2023/>.

2019 2020 2020 2020 2022

Accessing Certification

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.

If you did not receive a secure link email data_services@uua.org and include your name, congregation, and role within the congregation or go to uua.org/certify and log in to your congregation's Data Services account.

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: Monday, February 5, 2024 at 11:59 pm HST.

To submit this information, go to uua.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 and update your congregation's staff and lay leader contacts.
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, what services and resources you utilize, 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.

How to get Help?

Email data_services@uua.org and include your name, congregation, and role within the congregation.

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: Congregational Staff and Lay Leaders Listing

Verify that the UUA knows who your congregation's current staff and lay leaders are. Keeping this information updated ensures that your congregation's key staff and lay leaders receive appropriate updates and resources from the UUA, including from your regional field staff.

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.

Employment status and information about your paid (W2) employees is used by the Office of Church Staff Finances to ensure updates about compensation and

benefits is delivered in a timely manner to the proper contacts in addition to helping congregations stay in compliance with employment laws.

1. Please provide the name and email of those who hold the following roles along with their employment status.

Administrator, Director of Music, Membership Coordinator, Minister, Religious Educator, Personnel/HR Lead, President, Secretary, Treasurer, Vice President.

Employment Status Options:

- a. **Volunteer:** works without paid compensation.
 - b. **Paid Employee:** employed by your congregation, on payroll, receives a W-2. Includes interns.
 - c. **Independent Contractor:** provides contracted services for a set fee, pays their own employment taxes, receives a 1099 (if meets income threshold), ineligible for benefits.
2. How many paid W-2 employees do you have? Include all W-2 employees, including ministers, regardless of position or number of hours.
 3. If you have W-2 employees, which of the following UUA benefits do you offer? Check all that apply. UUA Health Insurance, UUA Dental Insurance, UUA Long Term Disability Insurance, UUA Life Insurance, UU Org Retirement Plan.

REMINDER: You can manage roles and positions in your congregation along with congregational members via MyUUA. <https://my.uua.org> If your congregation changes leadership mid-year, such as after a spring congregational meeting and election, please update your leader listing in MyUUA.

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, 2022-June 30, 2023). These figures are used to calculate Annual Program Fund requests and to provide the UUA 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. Rental/Building Use Income	
8. Endowment and Reserves	
9. Long-Term Debt	

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. 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	
Regularity of Religious Services	
Confirmation of Membership Business Meeting	
Total Participation – ALL AGES	
All Ages Virtual Participation Percentage	
Participation – Children & Youth ONLY	
Children & Youth Virtual Participation Percentage	
Religious Education Enrollment	

1. Current Members: This should be your congregation's **current** number of members as defined by your congregation's Bylaws. Non-member friends are counted in another question.

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 (estimated, if necessary).

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; non-member parents of children and youth 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. Have you held regular religious services? If so, with what regularity? (More than weekly, Weekly, at least monthly, Seasonally, Annually)
5. Have you held at least one business meeting of your members in the past year? (Y/N)
6. Total 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 in-person/virtual/online activities?
7. What percent of the total participation is from virtual/online participants? We recognize this can vary from week to week. Please provide the average percentage.
8. 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) typically engaging with your congregation on a weekly basis in any of its in-person/virtual/online activities?
9. What percent of children & youth participation is from virtual/online participants? We recognize this can vary from week to week. Please provide the average percentage.
10. 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 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.

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 over time. Results of this survey will be publicly reported, protecting the anonymity of individual congregations and leaders.

Congregations who are unable to complete the diversity questionnaire or opting out must provide a reason for doing so.

In this questionnaire Black, Indigenous, and People of Color (BIPOC) 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 Black, Indigenous, and People of Color (BIPOC)?
 - Those who identify as BIPOC 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.

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.

3. Staff diversity

- How many paid full- or part-time staff (including ministers) does your congregation employ?
- How many of these staff members identify as Black, Indigenous and People of Color (BIPOC)?
- Of those paid staff who identify as BIPOC, how many are religious professionals? (Include staff functioning at a Specialist, Manager, Director, or Executive/Minister level in any administrative, operational, or programmatic role.)

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 BIPOC?

Section 6: Congregational Questionnaire

This section of certification helps the UUA's Congregational Life, Organizing Strategies, and Office of Church Staff Finances teams gain a sense of what is important in the life of your congregation and how we can help support your work.

Question numbers (#) are not sequential and serve as an ID to make it easier to track questions year after year as questions are added and removed.

#19.1 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 0-5:

0 = Did not interact with UUA staff

1 = Not at all helpful

2 = Somewhat unhelpful

3 = Neither helpful nor unhelpful

4 = Somewhat helpful

5 = Very helpful

#21.1 How would you rate the conflict in your congregation in the past year? On a scale 0-6:

0 = We don't have notable conflict

1 = We have creative tension in our community that helps us go deeper and lean into issues as they arise. We practice Covenant and hold

ourselves accountable to our promises.

2 = We have disagreements that are uncomfortable at times – however, we call ourselves back into Covenant and work to maintain our mission.

3 = We have arguments that are difficult to navigate. Covenant is sometimes difficult to maintain, however, we call ourselves back into Covenant and right relationship most of the time.

4 = We have arguments that are destructive – trust is eroding, it is difficult to stay on mission, and hold ourselves accountable to our Covenant.

5 = We have factions in the congregation that do not trust each other and do not listen to one another's views. Movement forward on our mission is difficult to impossible, pledging is down, and Covenant is broken.

6 = We are imploding, the leadership is exhausted, mission and Covenant cannot be maintained, trust is completely eroded, people are leaving the congregation, pledging, and living up to the pledges that are made is low.

#19.3 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
- Destructive behavior
- Discernment about when and whether to call the police
- Employee conduct, including bullying, and/or sexual harassment
- Limited access agreements
- Responding to threats, harassment or violence from outside groups
- Safety guidelines for gathering in person

- Youth safety
- Other (please specify)

#19.2. To what extent do your congregation's mission and strategic goals drive the work and ministry of your congregation? (For example, do they shape your budget decisions, programs, worship life?) On a scale of 0-5: Not at all, very little, a little, somewhat, much, very much.

#19.4. Has your congregation collaborated with another UU congregation on any of the following over the past year?

- Community event
- Informal conversation or support
- Religious education programming, including Our Whole Lives
- Shared project or program
- Shared staffing arrangement
- Social justice programs or initiatives
- Worship/Sunday Services
- Other (please specify).

#24.1 Which of Side With Love's priority issues are you working on?

- Bodily Autonomy (UPLIFT Action) includes LGBTQ+, Trans* & Reproductive, & Disability Justice
- Climate Justice includes Green Sanctuary
- Decriminalization (Love Resists) includes policing & immigration
- Democracy includes UU The Vote

#24.2 What types of actions has your congregation done this year?

- Attend rallies or vigils
- Canvassing door to door
- Civil Disobedience
- Direct Action

- Hosted rally or vigil
- Legislative Advocacy
- Letter Writing
- Phonebanking
- Working in relationship with local organization/s
- Other

#24.3 How many active social justice teams or committees do you have?

#19.6 Which of the following has your congregation experienced in the past year towards increasing its ability to dismantle white supremacy culture and become more welcoming to people with marginalized identities?

- 30 Days of Love
- 8th Principle Workshop or Learning Circle
- Abolitionist Visions of Climate Justice
- Accessibility and Inclusion Ministry Program (AIM)
- Beloved Conversations
- Beyond Categorical Thinking
- Book Club/Group
- Building the World We Dream About curriculum
- Clear policies and procedures about how decisions are made and communicated
- Conversations for Liberation
- Cultivating Climate Resilience through Disaster Response & Community Care
- Dismantling White Supremacy Workshops / Resources
- Encouragement of caucus groups for marginalized identities (e.g. Community of Communities model)
- Formed community partnerships with outside groups (such as Black Lives Matter chapters, migrant rights groups, NAACP, locally organized anti-racist groups)
- Green Sanctuary 2030: Mobilizing for Climate Justice
- Intercultural Competence and Sensitivity
- Leadership development training that includes a DEI (diversity, equity and inclusion) dimension

- Mosaic
- Recruitment and outreach programs
- Revised/Updated hiring practices based on an understanding of structural racism
- Speaking up for Trans Lives 101
- Taking a Collective Breath/Reconstruction
- Welcoming Congregation Refresher
- Widening the Circle
- Other (please specify)

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

- 2023-24 Common Read: “On Repentance and Repair” by Rabbi Danya Ruttenberg
- 2022-23 Common Read: “Mistakes and Miracles” by Nancy Palmer Jones and Karin Lin
- 2021-22 Common Read: “Defund Fear” by Zach Norris
- 2020-21 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
- Side with Love toolkits and resources
- Small group ministry guides
- Tapestry of Faith curricula
- Theme-based ministry resources
- UU Institute online trainings
- Worship Web
- Other (please specify)

#19.8 What online congregational leadership and management resources or materials provided by the UUA has your congregation used in the past year?

- Church management materials and guides
- Communications, website, or social media resources
- Congregational staff benefits, compensation, and HR resources
- Email Lists (e.g. Side with Love, Create Climate Justice, Love Resists, UU the Vote, UPLIFT Action), UU Leaders, REACH)
- Faithify crowd funding platform
- Health Emergency Related Resources (e.g. pandemic guidance)
- InSpirit Books and Gifts/ UUA Bookstore
- Leadership development, Leader-Lab, or governance resources
- Outreach, growth, and membership guides or materials
- SideWithLove.org justice trainings, blogs, worship and organizing resources
- Stewardship For Us consultants
- Stewardship or fundraising resources
- UU Institute online trainings
- UUA social media
- Other (please specify)

#19.9 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
- Resources Through the LeaderLab Database
- Online Courses Through the UU Leadership Institute
- Regional Assembly
- Regional Cluster Events
- Regional Leadership School or Training
- Regional Newsletter
- Regional Youth Events and Conferences
- Side With Love Trainings
- Webinars or Workshops, In-Person or Online
- Zoom License Discount
- Other (please specify)

#21.2 Does your congregation host an identity-based caucus or covenant group/circle for any of the following:

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

#22.1 Number of youth bridging in the next year?

The Office of Lifespan Faith Engagement is hoping to further support UU youth transitioning into young adulthood (also known as “bridging”). This question will help the UUA anticipate which communities that youth are bridging in so we can support those congregations with further resources.

#21.3 Which of the following aspects of congregational life have you offered virtually?

- Adult Faith Development
- Community-Building (Game Nights, Talent Shows, Trivia, etc.)

- Community Meals
- Congregational Board, Annual, or Business Meetings
- Family Ministry Programs
- Religious Education Classes for Children and Youth
- Small Groups
- Social Justice Activities
- Worship
- Other (please specify)

#19.10 In what ways can the UUA help your congregation?

- Compensation and Benefits (Insurance and Retirement)
- Conflict Resolution/Reconciliation
- Copyright & Music Licensing
- Fundraising & Legacy Giving
- Governance
- Implementing Widening the Circle of Concern
- Leadership Development
- Multiplatform/Multichannel Events
- Outreach, Growth, and Membership
- Pastoral Care Resources
- Religious Education
- Social Justice Organizing
- Staffing, Hiring, and Human Resources
- Worship Resources
- Other (please specify)

Change Log

2024 Revisions

Section 2: Expanded list of contract roles and are asking congregations to provide employment status of each role.

Section 2: Two questions added: “How many paid W-2 employees do you have?” and “If you have W-2 employees, which of the following UUA benefits do you offer?”

Section 4: Two New Questions added: “Have you held regular religious services? If so, with what regularity?” and “Have you held at least one membership business meeting in the past year?”

Section 5: The question “Which of the following has your congregation done in the past year, if any, to increase the racial and ethnic diversity of your congregational staff and volunteer leadership?” was merged with question 19.6 in section 6.

Section 6 Questions 19.1, 19.2, and 21.1 are now formatted like other questions with clearer descriptions for each level and a ‘0’ option for when not applicable. 21.1 now uses a scale from 0-6.

Section 6 Question 19.3: Added: “Responding to threats, harassment or violence from outside groups” and “Discernment about when and whether to call the police”.

Section 6 Questions 24.1, 24.2, and 24.3 replaced the question “Has your congregation publicly acted in support of any of the following social justice issues in the past year?”

Section 6 Question 19.6: Added: “Green Sanctuary 2030: Mobilizing for Climate Justice”, “30 Days of Love”, “Taking a Collective Breath/Reconstruction”, “Abolitionist Visions of Climate Justice”, “Speaking up for Trans Lives 101”, and “Cultivating Climate Resilience through Disaster Response & Community Care”

Section 6 Question 19.7: Added “2023-24 Common Read: “On Repentance and Repair” by Rabbi Danya Ruttenberg”, “UU Institute Online Trainings”, and “Side With Love Toolkits and Resources”

Section 6 Question 19.8: Replaced “Congregational compensation consultants” with “Congregational staff benefits, compensation, and HR resources” and replaced “Congregational social justice organizing resources including UU the Vote” with “SideWithLove.org justice trainings, blogs, worship and organizing resources”. Added: “UU Institute online trainings”. Modified UUA Email Lists to be simply “Email Lists” with more examples of lists.

Section 6 Question 19.9: Added options “Side With Love Trainings”, “Regional Cluster Events”, and “Resources Through the LeaderLab Database”.

Section 6 Question 21.3: Added options “Community-Building (Game Nights, Talent Shows, Trivia, etc.)” and “Congregational Board, Annual, or Business Meetings”.

Section 6 Question 19.10: “Office Church Staff Finances” option replaced with “Compensation and Benefits” and “Staffing, Hiring, and Human Resources” options. Also added “Pastoral Care Resources”.