PART 1: MONITORING INFORMATION

Prologue to Interpretation:
The UUA Administration believes in the power of our liberal religious values to change lives and to change the world. We understand healthy Unitarian Universalist congregations and communities to be primary means and methods to create transformation, especially so when they understand themselves as part of a larger movement of purpose focused outward. We see the role of UUA staff to empower and inspire those gathering with this intention (which includes both congregations and any other formal or informal gathering) to join together to increase the expression of those values in daily life, spiritual life and the world.

It is the congregations and communities themselves that actually do the work and make the changes this evolving world calls for and so we understand the UUA staff to be accountable for ensuring the communities have and know about the tools and practices that can make them more healthy and impactful, as well as creating the infrastructure for new kinds of communities to emerge. The UUA is also accountable for raising the general public recognition of the relevance of UU values in today's world.

We realize that, in so doing, the UUA as an institution, as well as the structure of our communities, may evolve in directions beyond our current institutional forms, and we believe it is our role to be open to and encourage that evolution.

ENDS MONITORING

Global End Policy

A healthy Unitarian Universalist community that is alive with transforming power, moving our communities and the world toward more love, justice, and peace in a manner that assures institutional sustainability.

Interpretation:

Everything that needs to be further interpreted in this policy is fully defined in the lower level policies with three exceptions below and so will be evidenced when the lower levels interpretations are found in compliance. The three exceptions are "Unitarian Universalist community," "transforming power" and "institutional sustainability."

We understand "Unitarian Universalist community" to include those who identify as Unitarian Universalists. This may include active participants in Unitarian Universalist affiliated congregations and also those who declare their connection and adherence to our principles and values. We are aware that this community is influenced by others – past, present and future – with whom we are in relationship, and that in turn our actions and values have impact upon the larger world. We also understand "community" to be the larger web of connections between and among UU congregations and communities and the UUA institution and other UU institutions.

We believe that "transforming power" is that which inspires people to understand their capacity for change and strengthens them in taking responsibility for that change. We also understand it to be that which, conversely, helps them recognize the ways in which they may not be in control or self-sufficient and therefore in need of others in community and to be open to moments of grace.

This will be evidenced by an increased number of UUs who attest to this experience through a self-assessment tool developed by the UUA and in focus group conversations recorded as anecdotal evidence.

We interpret "institutional sustainability" to apply to the ongoing ability of the UUA to serve as an instrument, through the actions of our congregations and communities, of achieving the called for transformation which will be accomplished through the measurement of impact and the judicious use of resources. This will be evidenced when at least 80% of major strategic programs designed to accomplish our Ends interpretation are being assessed with a formal process for de-

termining impact in order to make decisions about further efforts and when an annual analysis shows that of those, all were found successful or adjusted based the information.

It does not mean that the UUA will above all focus on maintaining our present institutional forms, but that it will sustain its ability to make the community/communities healthier as measured by the lower level policies.

Monitoring Data:

1. Congregational Self-assessment Tool:
   This tool will ask congregational leaders to assess their institutional and community health according to six categories: Worship, Leadership, Faith Development, Community Life, Justice Ministries and Denominational & Community Connections. Each area includes an aspirational vision, questions for assessment, a storytelling exercise and articulation of future goals. This assessment tool will provide a structure for aligning UUA programming and resources toward helping congregations and communities fulfill the Ends of the Association. This tool is still in the development and testing stage and will be available for large scale usage by Spring of 2015.

   We report non-compliance for lack of data.

2. Program Assessment Process
   We are in the process of collecting data about congregational, community and individual participation in all programs, initiatives and resources of the UUA. This data allows us not only to determine how widely utilized our programs, etc. are, but also whether there are correlations to growth or cross congregational or denominational activity. This data collection is approximately 80% complete, and its collection is being further refined. This data is available for examination. (See attached memo for a description of ongoing development and refinement of this process)

We report non-compliance for lack of comparative data.

End Policy 1.1

Policy 1.1: Congregations and communities are covenanted, accountable, healthy, and mission driven.

Interpretation:
We believe congregations and communities, as stated above, are primary means and methods to fulfillment of our ends.

"Covenanted" We understand covenant to mean that congregations and communities make explicit and ongoing promises of faithful relationship to one another. We also understand this means individuals, communities and congregations understand themselves as a part of a larger whole (both institutionally and spiritually) in which they both contribute and receive. We also understand covenant to include our promises to others outside of our faith.

"Accountable" We understand accountable to mean that congregations and communities understand that their purpose is not just to serve their members, but are also under obligation to serve their surrounding community and the wider world, with particular accountability to the vision of our ancestors, the emerging generations, and people historically marginalized in larger society.

"Healthy" We understand "healthy" to mean that a community exhibits radical hospitality, passionate worship, intentional faith development, risk-taking service and witness, and faithful generosity.[1]

"Mission-driven" We understand "mission-driven" as related to our earlier statement that congregations and communities are the means of transformation, and therefore their understanding of

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[1] Adapted from *Five Practices of Fruitful Congregations* by Bishop Robert Schnase.

transforming purpose must be clear, concise and explicable to anyone joining or observing from outside. Their mission must not just be expressed but their activities must demonstrate alignment with their expression.

This will be evidenced by a majority of congregations and communities showing increased capacity over time in above areas based on a self-assessment and reflection tool developed by the UUA measuring healthy congregational behaviors.

Organizational Impact and Rationale:
As stated above, the values of Unitarian Universalism are those best expressed by our people from the inside out, from inside the persons, congregations and communities to outward action in the world.

We understand that "love, justice and peace" are ideal expressions of beloved community that are not achievable in this lifetime, but infinitely worthy of efforts in those directions. Healthy expressions of Unitarian Universalism, like healthy individual behaviors, are best encouraged through inspiration and example, rather than through prescription or dictates. Therefore encouraging congregational self-assessment of improvement over time gives us indications of progress which could be correlated to UUA efforts, but not caused by them.

The paradigm of learning that we are employing has shifted from "program" to "ethos" in which we communicate and encourage core values of approach, but do not proscribe the exact practice. We are finding that Unitarian Universalists learn best from one another, and increasingly understand our role as being to create structures of connection among UU communities.

We also believe that such states of health are not achievable by Unitarian Universalists alone, but require partnership with others who may not share our beliefs, and ask us to cross boundaries of comfort, and recognition, as well as class, race and creed.

Monitoring Data:

See above description of Congregational Self-assessment Tool.

We report non-compliance for lack of data.

Ends Policy 1.2

Congregations and communities are better able to achieve their missions and to spread awareness of Unitarian Universalist ideals and principles through their participation in covenanted networks of Unitarian Universalist congregations and communities.

Interpretation:

UUA staff will create and/or support programs and opportunities for congregations to learn together and gather together on a cluster, district / regional, and national levels. Success will be evidenced by at least 75% of functioning congregations participating in such opportunities and at least 50% of individuals reporting (through feedback mechanisms of these events) that their work toward mission has been enhanced.

Organizational Impact and Rationale:

Unitarian Universalists grow in their faith and their impact when they become inspired by one another. Leaders learn best from the example of one another and the ability to see themselves in a larger context. The role of the Association is to create accessible (physically and virtually) structures for such gatherings, and can encourage this as well by offering programs to collections of congregations, rather than just one-on-one.

Monitoring Data:

    1. Attendance at General Assembly and Regional / District Assemblies
       a. General Assembly Attendance
          i. 64% of all congregations (including UUA International) sent at least one delegate to GA.

1. 92% of Large congregations (over 550 members)
2. 100% of Medium II congregations (400 – 549 members)
3. 93% of Medium I congregations (250-399)
4. 85% of Small II congregations (100-249)
5. 42% of Small I congregations (0-99)

b. Regional / District Assembly attendance
  i. 49 % of all congregations sent at least one delegate to Regional / District assemblies
    1. 75% of large congregations
    2. 73% of Medium II congregations
    3. 68% of Medium I congregations
    4. 63% of Small II congregations
    5. 34% of Small I congregations

2. We are in the process of gathering data for attendance at other district / regional trainings/ programs / events

3. We are currently in the process of developing consistent evaluation survey questions to assess impact of programs

We report non-compliance for lack of complete data.

Ends Policy 1.3
Congregations and communities are intentionally inclusive, multigenerational and multicultural.

Interpretation:

1. UUA staff, volunteer structures, and policies will model inclusivity of age, identity and culture as evidenced by increased diversity in these areas.

2. Congregations and communities will have access to resources (see Policy 1.5 interpretation) that deepen their ability to grow in their in-

clusivity as evidenced by increased usage of relevant resources as well as participation in activities and partnerships that create border-crossing experiences.

3. Congregations and communities will engage in intentional self-reflection and cultural changes as evidenced by increased participation in learning arenas in these areas.

Organizational Impact and Rationale:

We believe the most important word in this policy is "intentional." Communities that are authentically inclusive of all regardless of age, culture, class, race, creed, ability, and identity are created by a theologically grounded, learned and encouraged willingness to cross borders in all these arenas.

The role of the Association is to model inclusion in staff and volunteer structures; to create educational and experiential opportunities that invite individuals and communities into this learning; to discover, highlight and partner with best practices in communities that achieve high levels of inclusion.

Monitoring Data:

1. Modeling Inclusivity:

    a. As of 9/30/14 UUA staff is comprised of: *[Note: the following terminology is according to EEO standard terminology and does not represent the UUA's understanding of how these categories are/ should be coded]*

        i. Latino / Hispanic:

            1. 1 at Executive level (7%)

            2. 1 at First Management level (3%)

            3. 1 at Professional level (1%)

            4. 0 at Sales Worker level

            5. 1 at Administrative Support level (2%)

      6. 1 at Service Worker level (2%)

  ii. White:

      1. 12 at Executive level (85%)

      2. 24 at First Management level (75%)

      3. 87 at Professional level (90%)

      4. 1 at Sales Worker level (100%)

      5. 52 at Administrative Support level (81%)

      6. 2 at Service Worker level (33%)

  iii. Black or African American

      1. 1 at Executive Level (7%)

      2. 2 at First Management Level (6%)

      3. 3 at Professional level (9%)

      4. 0 at Sales Worker level

      5. 3 at Administrative Support level (5%)

      6. 4 at Service Worker level (67%)

  iv. Native Hawaiian or Pacific Islander

      1. 0 at Executive level

      2. 0 at First Management level

      3. 3 at Professional level (3%)

      4. 0 at Sales Worker level

      5. 0 at Administrative Support level

      6. 0 at Service Worker level

  v. Asian

      1. 0 at Executive level

      2. 0 at First Management level

      3. 1 at Professional level (1%)

      4. 0 at Sales Worker level

    5. 4 at Administrative Support level (6%)

    6. 0 at Service Worker level

vi. American Indian or Alaskan Native (0%)

vii. Two or more races

    1. 0 at Executive level

    2. 1 at First Management level (3%)

    3. 2 at Professional level (2%)

    4. 0 at Sales Worker level (2%)

    5. 4 at Administrative Support level (6%)

    6. 0 at Service Worker level

viii. Gender [*Note: EEO Standards do not include a category for transgender or gender neutral. We are in the process of determining how to track this in ways that do not force a choice and at the same time allow for personal privacy*]

    1. 8 male (57%) and 6 (43%) female at Executive level

    2. 16 male (50%) and 16 female (50%) at First Management level

    3. 28 male (29%) and 69 female (71%) at Professional level (3%)

    4. 1 male (50%) and 1 female (50%) at Sales Worker level

    5. 16 male (25%) and 48 female (75%) at Administrative Support level

    6. 1 female (17%) and 5 male (83%) at Service Worker level

ix. We do not formally track for sexual orientation as we are concerned about protecting privacy

    b. Volunteer Committees and Task Forces: We are currently in the process of determining how we may formally track for inclusion in our volunteer structures.

We report non-compliance for lack of comparative data.

2. Participation in and use of resources for inclusion *(the following metrics include total numbers of participants/ congregations in programs related to inclusion and border crossing. Because these programs change over time they are an inadequate measure for change over time, or impact or lasting effect. They are offered simply as a snapshot glimpse of congregations' and individuals' interest in these areas.)*

    a. 762 congregations are officially recognized as Welcoming Congregations (72.8% total)

    b. 443 congregations reported participating in some kind of Standing on the Side of Love event.

    c. 65 congregations participated in College of Social Justice trips (106 participants.) 33 youth participated in 2 Youth Justice Trainings and 15 interns were placed in social justice settings (FY2013-14 only)

    d. There are 600 UU United Nations Office Envoys representing 120 congregations. 185 attended the 2014 Spring Seminar including 42% youth and 15% young adults.

    e. Out of 65 congregations in search for full or part-time ministry, 39 participated in Beyond Categorical Thinking workshops, representing approximately 8000 constituents.

    f. The UUA Multicultural Ministries Sharing Project drew 1528 responses and included 27% who identified as a person of color, 56% as people with disabilities, 55% as someone with a marginalized sexual orientation and 2% transgender / gender non-conforming (see incidental report submitted 10-14)

g. 90 people have registered to participate in the "Virtual Community of UUs of Color" convened by our Faith Development Director.

h. Out of the top 20 bestsellers in the UUA bookstore of 2013-2014, 8 are related to multiculturalism, multigenerationalism and justice ministry (including three which have only been published mid-year)

i. Out of the top 100 page views in UUA.org, 46 are related to social justice, multiculturalism, inclusion, and multigenerational resources. The top ten include OWL, Tapestry of Faith and LGBTQ inclusion.

We report non-compliance for lack of comparable or evaluative data.

3. Intentional self-reflection and culture change: *[same caveat as above]*

a. The Mosaic Makers conference on intentional multiculturalism included 19 congregations (70 registrants plus 40 participants from the host congregation of All Souls, Tulsa)

b. The Leading Edge Conference of the Middle Collegiate Church of New York City added an additional day on multicultural worship for Unitarian Universalists in which 100 people participated: 80 registrants from 30 congregations and 20 UUA staff people.

c. The Southern Region Mosaic Makers Conference drew 75 people from 12 congregations.

d. As mentioned above: 762 (72.8%) congregations are recognized as Welcoming Congregations

    i. 37 Large Congregations (95%)

    ii. 296 Mid-Size congregations (96%)

    iii. 423 Small congregations (60%)

We report non-compliance for lack of comparative data.

Ends Policy 1.4

Congregations and communities engage in partnerships to counter systems of power, privilege and oppression.

Interpretation:
1. The UUA administration will participate in partnerships at multiple levels of the organization and create a campaign structure (such as Standing on the Side of Love) which encourages congregations, communities and individuals to participate in such partnerships as well, as evidenced by increased numbers of collaborations at the administration level and increased participation in the campaign structure.
2. Congregations and communities will engage in their own communities in interfaith partnerships through other community organizational structures, as evidenced by an increased number reporting such collaborations.

Organizational Impact and Rationale:
We understand that Unitarian Universalists have an obligation to learn about systems of power, privilege and oppression, both as systems we unintentionally participate in, as well as broader systems that are not entirely within our control. We believe partnerships with groups and individuals beyond Unitarian Universalism are vital to bringing the most power to change these systems. Such partnerships do not require complete alignment on everyone's part about every issue, but the development of connections and strategies relevant to our highest priority of justice issues.

The Association's role is to model these partnerships at an international, national and regional level through pursuit of our justice priorities and to help create a campaign infrastructure that allows local groups to participate in such partnerships.

Monitoring Data:
1. The UUA Administration is an active participant in a great multitude of interfaith and social justice partnerships especially in these arenas:
   a. Interfaith organizations promoting religious tolerance and understanding
   b. GLBTQ rights and inclusion
   c. Immigration Justice
   d. Economic Inequality
   e. Racial Justice
   f. International peace
   g. Worker justice
   h. Shareholder Advocacy
   i. Litigation "Sign-ons"

2. The Standing on the Side of Love Campaign structure has created a message and framework for congregations, communities, and individuals to participate in a recognizable way in demonstrations for justice. In a recent survey of 1300 UU religious professionals, 124 respondents reported that
   a. 75% of respondents were on the SSL email or social media platforms
   b. 75% have engaged in a public event using SSL branding / gear.
   c. 64% share SSL information with their congregations
   d. 59% use SSL banners / signs inside or outside their congregations
   e. 54% have held a SSL themed worship
   f. 34% have a social justice or SSL committee that tracks SSL issues
   g. 33% have purchased and re-sold SSL gear at their congregations
   h. 30% participated in 30 Days of Love.

   We report non-compliance for lack of comparable data.

Ends Policy 1.5
Congregations and communities have and use Unitarian Universalist Association resources to deepen the spiritual and religious exploration by people in their communities, to enhance the ministry of their members and to improve their operations.

Interpretation
#1: Resources which are designed to help congregations and communities, regardless of economic circumstances, achieve the interpretation of 1.1 (including physical and virtual publications, trainings, and events to connect them with others) will be used increasingly each year as measured by:
> a. Number of publications accessed
> b. Number of persons attending training
> c. Anecdotal evidence based on the number of joint efforts and their estimated attendance.

#2: Resources provided will be deemed to deepen, enhance and improve congregations when they are referenced as a source of improvement in a self assessment tool provided by UUA.

#3: The self assessment tool will be completed by an increasing number of congregations and communities each year.

Organizational Impact and Rationale:
We hold that the Association's role is to curate, develop and promulgate resources that lead congregations and communities toward their abilities to be covenanted, healthy, accountable and mission-driven as defined above in Ends Interpretation 1.1. We understand that many such resources already live within congregations and communities and external resources and that the Association is able to pursue this end by curating and promulgating best practices, creating learning communities among congregations and communities, as well as encouraging the use of local resources.

We have come to believe that the most sustainable learning does not always happen through the transmission of information but also

through the development of relationships that strengthen capacity and resiliency. Therefore creating encouragement and opportunities for congregations and communities to gather with one another strengthens this End.

We recognize that we must balance this End with institutional capacity and sustainability as outlined above.

Monitoring Data:
There is currently no technical capacity to track which resources are utilized by UU individuals or congregations. We are only able to track raw numbers of publications and sites accessed. The new Drupal-based website will allow us to create congregational and individual profiles that will enable us to track such data. The Congregational Self-Assessment will include surveys to allow congregations to indicate UUA resources used to increase their health toward Ends.

We report non-compliance for lack of data.

Ends Policy 1.6
There is an increase in the number of people served by Unitarian Universalist congregations and communities.

Interpretation:
There will be an increased number of people participating in UU congregations and communities and persons served by these communities (both existing and emerging) as evidenced by the self-reporting of communities on membership numbers and people served.

Organizational Impact and Rationale:
The role of the Association regarding growth is to offer congregations and communities strategies and resources for their own expansion of numbers and impact. Membership numbers are not the only indicator of growth, however. We understand it to be our role to encourage congregations to serve the community beyond their walls, as well as to deepen in their spiritual engagement.

Monitoring Data:
See accompanying Dashboard for growth data.

While we currently request numbers of "people served" by congregations, not just membership numbers, the collection methods and criteria for this data are not universal and therefore the numbers are unreliable.

We report non-compliance.

Ends Policy 1.7
There is an increase in the number of Unitarian Universalist congregations and communities.

Interpretation:
There will be an increase in the number of new communities and congregations in relationship to the UUA each year.

Organizational Impact and Rationale:
It is the role of the Association to encourage existing congregations to employ growth strategies which research shows to be effective in the larger religious context (such as multi-site development) to respond to self-organizing groups with resources, coaching and encouragement, as well as to train religious leaders in entrepreneurial methods.

Monitoring Data:
There were two new congregations recognized by the UUA Board in 2013-2014. There are 52 new communities being tracked and resourced by staff.

We report compliance.

Ends Policy 1.8
There is an increase in the number of inspired ordained and lay religious leaders equipped to effectively start and sustain new Unitarian Universalist congregations and communities.

Interpretation:
There is an increase in the structural opportunities (within the UUA and with other institutional partners) for both lay and professional leaders to train in methods of entrepreneurial leadership.

Organizational Impact and Rationale:
The role of the Association is to partner with our theological schools and professional organizations to provide education about effective religious leadership (inclusive of ministers, religious educators, musicians and laity). We also understand it to be of great import to learn about and promulgate entrepreneurial methods and opportunities. We also understand our role to educate our entire Unitarian Universalist community about changing social and cultural contexts that create new challenges and opportunities for the creation of new communities. We believe existing healthy congregations are the best launching place for inspiration and our role is also to highlight and help others learn from effective multi-site ministries.

Monitoring Data:
1. The UUA is collaborating with the UUMA to provide a "Beyond the Call: Entrepreneurial Ministry" 2 year training for ministers to learn growth and outreach methods from secular entrepreneurial leaders. 25 participants were chosen to participate in this training which begins in February, 2015
2. Congregational Life is currently running 13 "Innovative Learning Circles" for religious leaders including 68 participants from 52 congregations.
3. Congregational Life has created a new "Multisite Ministries" website hub of resources and a network congregations participating in multisite experiments.
4. "Faithify" – a new crowd-sourcing funding support for innovative ministries launched in June, 2014 and has reaped these results:

PERFORMANCE REPORT
through November 2014

FAITHIFY

Active projects
[Commemorate 50th Anniversary of Selma Voting Rights Campaign](#)
[UUs and Climate Action: Congregations Ready to Respond](#)
[Class Conversations: UUs Get Real About Privilege and Access](#)
[Sanctuary: Keeping Immigrant Families Together](#)
[FUSW Green Sanctuary Upgrades](#)

Cumulative to date (except as noted)		2014				
		28-Jul	25-Aug	25-Sep	25-Oct	25-Nov
money	pledges ($)	$48,917	$95,913	$108,391	$122,337	$129,288
	pledges (#)	490	863	912	987	1,082
	average pledge	$100	$111	$119	$124	$119
	pledges to pending projects			$1,865	$10,371	$6,126
	pledges to successful projects			$95,017	$100,457	$103,033
	pledges to unsuccessful projects			$11,509	$11,509	$20,129
	donations to our UUA ($)			$547	$593	$649
	donations to our UUA (#)			106	116	126
projects	projects posted	24	26	27	29	33
	open projects	24	3	3	3	5
	closed projects that met goal	2	13	14	15	16
	closed projects that did not meet goal	1	10	10	11	12
	project success rate			58.3%	57.7%	57.1%
social media	Facebook likes (as of report date)	899	925	965	1,116	1,170
	Twitter followers (as of report date)				169	440
	page views (this month)				6,092	8,901
	unique visits (this month)				3,038	4,317
	returning visits (this month)				409	797

Map of Recent Visitors to FAITHIFY (Nov. 22-24, 2014)
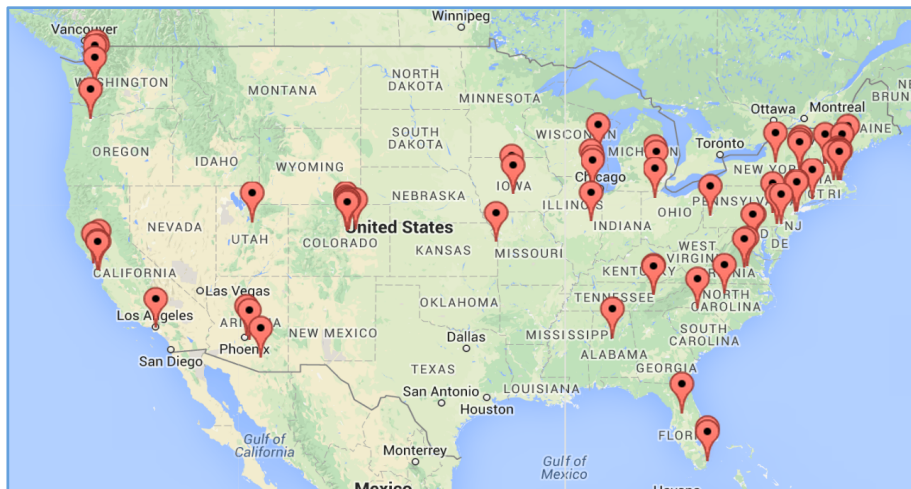
We report compliance.

Ends Policy 1.9
Unitarian Universalist institutions are healthy, vital, collaborative partners invested in the future of Unitarian Universalism, its principles and theologies.

Interpretation:
We understand UUA institutions to include the congregations and communities, whose health, vitality and collaboration will be shown by compliance with the above lower level policies.

We also recognize our obligation to be in collaborative and supporting relationship to other UU institutions (such as the theological schools, UUSC, UUMA) that results in an increased number of people participating in cross-institutional programs that inspire deeper relationship to UU values.

Organizational Impact and Rationale:
We understand this policy to mean that the ends as articulated in all above policies are best achieved by empowering our congregations and communities to participate in a larger vision of Unitarian Universalism through their relationships to one another, their embodiment of our values within their own communities, and their willingness to give time, talent and treasure to the wider association. The UUA is not the only institution charged with serving this End, and we are most sustainable when we create partnerships and collaborative opportunities with other UU institutions that maximize resources and inspire other partnerships.

Monitoring Data:

1. Please refer to monitoring report 2.9.1 for data regarding our support of and relationship to UU identity schools.
2. The UUA and UUSC, along with the UUMA, UU Ministry for Earth and DRUUMM are collaborating in the development of "Commit2Respond," a two year crowd sourced campaign de-

signed to increase congregations and individuals commitment to climate justice by growing the climate justice movement, shifting energy usage, and advancing the human rights of those affected by climate change. Over 2,000 individuals and 400 groups have already joined this effort.

3. The UUA International Office has collaborated with Meadville Lombard Theological Schools in conducting a 4 week intensive learning experience developed to support UU leaders outside of the US. These individuals are now in a peer community with one another and uniquely prepared to be leaders in our global movement.

We report partial compliance.