

Congregational Self-Assessment Packet



Congregational Self-Assessment Packet

Fulfilling the Promise Committee

Unitarian Universalist
Association of Congregations

CONGREGATIONAL SELF-ASSESSMENT PACKET

Introduction

Over the past three years the strategic planning team for the Unitarian Universalist Association, known as the Fulfilling the Promise Committee, has been encouraging congregations to become more intentional about formulating a clear sense of mission. Congregational self-assessment both needs and helps produce clarity about mission and priorities. It should involve leaders in the wider community the congregation serves. Nearby or comparable UU congregations can provide valuable “fair witness” to the process.

The hope is that we establish a norm of periodic “healthy congregation check-ups” that promotes congregational health, vitality, and strategic thinking. One thought is that congregations might be encouraged to go through a process of self-assessment every five years or so. Another is that congregational self-assessment should normally precede a search for new professional leadership or any major effort to assess the relationship between minister and congregation. Self-assessment is also a good prelude to exploring a building or capital campaign.

There is a separate set of materials has been developed for the purpose of assessing the leadership of the congregation, *Assessing Our Leadership: Promoting Effectiveness in Congregational Leadership* (contact Department of Ministry for this).

A word should be said about when NOT to use these materials. They are not intended for congregations in the midst of significant internal conflict. When there are residues of any significant conflict in the relatively recent past, special care should be given to ensuring objectivity on the Congregational Self-Assessment Team.

June 1, 2001



Fulfilling the Promise Committee:

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THREE APPROACHES TO CONGREGATIONAL SELF ASSESSMENT

This packet contains three approaches to Congregational Self-Assessment:

- I. A Comprehensive Congregational Self-Assessment Process
- II. An Annual Congregational Evaluation, pages
- III. The Faith Communities Today Interactive Workbook

A congregation may choose from among the above approaches, which fits its needs and timeframe.

I. A Comprehensive Congregational Self-Assessment Process

This approach includes five parts: (1) choosing a leadership team (2) a congregational profile, (3) an assessment form that can be completed by a leadership team or the whole congregation, (4) form for observations from others and (5) a guide for community interviews. The areas evaluated include: growth, community building, outward focus, religious growth, worship, leadership, and resources.

Use this approach if you want your assessment to include, in addition to your own congregational self-assessment, a perspective on your congregation's mission in the surrounding community. Because of its comprehensiveness, this approach requires more preparation prior to a congregational workshop to review the results of the assessment.

II. An Annual Congregational Evaluation

This approach is best used as part of an annual planning retreat of a congregation or its leadership. It includes an assessment form for congregational members and an outline of an annual planning event for the congregational leadership or the congregation.

This approach is best for a one-day retreat. Congregation members or participants in the retreat can be asked to complete the form prior to the retreat and then work during the retreat to determine congregational goals that are informed by the assessment.

III. Interactive Workbook: Faith Communities Today

This is a web-based interactive workbook that includes congregational self-assessment questions on five areas: public worship, spiritual growth, inviting and including, community outreach, and managing and leading. After completing the survey, the respondent can compare the results with the results of other UU congregations, congregations from other religious traditions or congregations in different regions of the United States (which was the focus of the survey). The Faith Communities Today survey, which involved over 41 faith traditions, provides the comparative data. This can be done individually or as part of a facilitated workshop in a congregation.

A Comprehensive Congregational Self-Assessment Process

**Developed by John Buehrens and
Lawrence Palmieri Peers**

This comprehensive approach includes five parts:

Part I: Choosing A Leadership Team, p. 4

Part II: Congregational Profile, pp. 5-6

Part III: Congregational Self-Assessment Form Process, pp. 7-19

Part IV: Recommendations for Action, pp. 20-21

Part V: Your Congregation's Relationship to the Community, pp. 22-24

PART I: CHOOSING A LEADERSHIP TEAM FOR THE CONGREGATIONAL SELF-ASSESSMENT:

Guidelines for choosing a leadership team.

PART II: CONGREGATIONAL PROFILE

This profile gathers basic data about the congregation. One person on the team can take the responsibility for completing this profile.

PART III. CONGREGATIONAL SELF-ASSESSMENT

This questionnaire assesses the congregation on key criteria for vitality and growth. It can be used in two alternative ways. In either case, the Team interprets scores and gets a picture of congregational strengths, weaknesses, and opportunities.

Step A: Filling out the congregational self-assessment form:

Option One: Leadership Team Members Complete Form: Members of the team complete the Congregational Self-Assessment using informal consultation and their own best judgment. This is obviously the “short form” approach, but may often be quite helpful.

Option Two: Congregation Members Complete Form: Obviously, this second option will take more lead-time. Congregation members can be invited to complete the form at a workshop or special meeting. Or the form can be mailed to all members or to members and friends. The team should use its best judgment. After compiling the data, they use that data and their own best understanding to do a summary assessment.

Step B: Interpreting Your Scores:

Compute the consensus of the team or the congregation for each item on the self-assessment form by computing the average score for each statement to assess how the congregation is doing on the focus areas listed.

PART IV. RECOMMENDATIONS FOR ACTION

After reviewing the results of the congregational assessment, the next step is to make recommendations for building upon your strengths and for addressing changes needed to improve your congregation's effectiveness in any of the areas of congregational life. Your congregation may also choose to invite a consultant to advise you on the areas in the assessment needing improvement or change.

PART V. YOUR CONGREGATION'S RELATIONSHIP TO THE COMMUNITY

A guide is provided for conducting interviews with key people in the community where your congregation is located.

I. CHOOSING A CONGREGATIONAL LEADERSHIP TEAM

The Board should designate a team to lead the congregational self-assessment. The team should always include the minister(s) and at least 3 or 4 experienced lay leaders. In smaller congregations a team of 4 or 5, including the current president, should be sufficient. Larger congregations, however, may prefer to include the chair of a strategic planning team, the church council, or former presidents.

There is much to be said for keeping the team to only 5 members, so that it can work efficiently. Even the largest congregation, however, should not use more than 9 people on the team. Consider including on your team a relative newcomer, a youth, a young adult, and people from diverse racial, cultural or economic backgrounds.

For each participant in the congregational team answer the following:

Team member's name	Role(s) in your congregation	How long has person participated in your congregation?

II. CONGREGATIONAL PROFILE

This basic information about your congregation may not be known by every team member. One person on the team can obtain this information and make it available for the rest of the team.

Current Membership:

- _____ 1. Total number of current adult members.
- _____ 2. Total number of adult non-members who participate in worship or other programs.
- _____ 3. Total number of children (under 12 years old)
- _____ 4. Total number of youth (ages 12 to 18 years old).
- _____ 5. Total current participants and members of your congregation (add #1-4).

Age Grouping of the Congregation:

How many of your members and participants fall within the following age ranges?

	Numbers in each category
Infant and Pre-school:	_____ 0-5 years old
Elementary School Age:	_____ 6-11 years old
Middle School :	_____ 12-14 years old
Senior High School:	_____ 15-18 years old
Early Young Adult Years:	_____ 18-24 years old
Later Young Adult Years:	_____ 25-29 years old
	_____ 30-35 years old
Adult:	_____ 36-44 years old
	_____ 45-54 years old
	_____ 55-64 years old
Seniors:	_____ 65-74 years old
	_____ 75 or older

Active households:

- _____ Single persons without children
- _____ Single persons with children
- _____ Couples without children at home
- _____ Couples with children at home
- _____ Other household types

Visitors and New Members:

Do you have a visitor's book or way of recording your visitor's names and addresses?

____yes ____no

_____2. If so, how many local visitors signed your visitor's book last year?

_____3. Do you contact visitors who have signed your book?

_____4. How many new members joined last year?

Programs and Participation:

_____1. Number of worship services your congregation has each month

_____2. Average attendance at Sunday worship services

_____3. Number of adults who participate in education or other programs

List the leading programs (other than worship) that you offer within your congregation to promote community and/or personal and spiritual growth:

List the programs that your congregation currently provides as community service, social action or social advocacy within your community:

III. CONGREGATIONAL SELF ASSESSMENT FORM PROCESS

This Congregational Self-Assessment Form Process includes the following parts:

	<u>Pages</u>
SECTION 1: THE CONGREGATIONAL SELF-ASSESSMENT FORM	8-10
SECTION 2: TEAM SCORING OF CONGREGATIONAL SELF-ASSESSMENT	11-12
SECTION 3: INTERPRETATION OF SCORES	13-18
SECTION 4: SUMMARY OF OUR CONGREGATIONAL SELF-ASSESSMENT:	19
SECTION 5: RECOMMENDATIONS FOR ACTION	20-22

SECTION 1: THE CONGREGATIONAL SELF ASSESSMENT FORM

Instructions: The leadership team or the congregation completes this form. How does the following statement describe your congregation?

	1 To no extent	2 To a small extent	3 To a moderate extent	4 To a great extent	5 To a very great extent
1. Our congregation attracts young adult (18-35 year old) newcomers.					
2. Members are encouraged to invite others to visit the congregation.					
3. Members feel comfortable talking about their Unitarian Universalist faith with others <i>outside</i> of the congregation.					
4. Members have opportunities to develop their UU faith and its meaning for them <i>within</i> the congregation.					
5. Participants in our congregation are encouraged to be involved in its mission and ministry.					
6. People with leadership roles are given support, encouragement and resources.					
7. We have a core group of young adults to build upon for programming focused for this group within our congregation.					
8. Our worship space is beautiful, maintained and large enough to accommodate our congregation.					
9. Our congregation inspires generosity and raises enough money to pay fair compensation and support programs					
10. Our congregation values our ministry to its children and families through religious education, and other programs and activities.					
11. Our congregation listens to the experiences of young adults.					
12. Our congregation is open to new initiatives for ways of doing things.					
13. Our congregation has a sense of direction for the future.					
14. A sense of belonging is nurtured and widespread within our congregation among various kinds of people.					

	1 To no extent	2 To a small extent	3 To a moderate extent	4 To a great extent	5 To a very great extent
15. Our congregation is visible and well-known in its community.					
16. We are strong in our ability to integrate new members into the congregation.					
17. The mission priorities of our congregation are clear and can be described by many members.					
18. We support and encourage members in their contacts and involvement within the community around us.					
19. The religious education and fellowship spaces are adequate and well kept.					
20. Our congregation handles capital financial needs well through fundraising, endowment and or deferred giving.					
21. Our worship inspires and supports the spiritual growth of our congregation.					
22. Training and/or support is available to members to help them to share their faith and to witness to their faith values.					
23. Our congregation has regularly studied the needs of the community around our congregation as a basis for planning.					
24. Our congregation has grown in membership over the last five years.					
25. Each year, we attract a number of newcomers equal to at least 10% of our membership.					
26. Attendance at worship services has increased over the last five years.					
27. Young adults feel positive about the worship style of our congregation.					
28. We attract new participants to our congregation on a regular basis.					
29. Members of our congregation value youth ministry.					
30. We have persons in our congregation who provide welcome and follow up to visitors and newcomers.					

	1 To no extent	2 To a small extent	3 To a moderate extent	4 To a great extent	5 To a very great extent
31. Our infrastructure (roof, offices, computer, kitchen, parking, etc.) is adequate and fully accessible.					
32. Our congregation raises substantial funds for outreach to good projects and causes it supports.					
33. Our worship provides the challenge and inspiration we need to live out our faith in the world.					
34. Members are encouraged to use their gifts and skills.					
35. Training and support is available to members in their leadership roles.					
36. We have assessed our congregation's progress toward becoming an anti-racist and multi-cultural congregation.					
37. We are well along in a specific strategic plan for our congregation's growth and institutional development.					
38. We have made progress on a specific plan toward paying fair compensation to all our employees. (see below**)					
39. Expectations and roles of paid professionals and volunteer leaders are clear and well-understood.					

* Guidelines for fair compensation are available through the UUA Office of Church Staff Finances.

SECTION 2: TEAM SCORING OF CONGREGATIONAL SELF-ASSESSMENT

Instructions: Put individual scores for each item on the table below. If team member 2 gave statement 1 a score of “4 – To a great extent”, enter “4” in appropriate box. After all the scores have been entered, tally the average score for each of the statements by adding the sum for each statement and dividing by the total number of respondents. If you are doing a congregational tally, then do an average score of all responses.

Team member: ➔	1	2	3	4	5	6	7	8	9	AVERAGE SCORE OF STATEMENT: Add items across; divide by # of respondents	
Statement #:										Sum of scores across	Divide sum by the number of respondents =
1											
2.											
3.											
4.											
5.											
6.											
7.											
8.											
9.											
10.											
11.											
12.											
13.											
14.											
15.											
16.											
17.											
18.											

Team member: →	1	2	3	4	5	6	7	8	9	AVERAGE SCORE OF STATEMENT: Add items across; divide by # of respondents	
Statement #:										Sum of scores across	Divide sum by the number of respondents =
19.											
20.											
21.											
22.											
23.											
24.											
25.											
26.											
27.											
28.											
29.											
30.											
31.											
32.											
33.											
34.											
35.											
36.											
37.											
38.											
39.											

SECTION 3: INTERPRETATION OF SCORES

Instructions: For each of the items below, put your team (or congregation) average rating for each statement and shade in the range of responses from the team or congregation as in the sample below.

	1	2	3	4	5
Statement #:					
25. Each year, we attract a number of newcomers equal to at least 10% of our membership.		x			
28. We attract new participants to our congregation on a regular basis				x	

In this example, there is a wide spread of responses (from “1” to “4”) represented with the consensus (or average score) toward the lower end of the range (or a score of “2”). Whereas, in Question 28, there is a narrower range of responses (from “4” to “5”), with the consensus represented by the average score of “4”.

The areas of congregational life used in this assessment are derived from various resources and research on growing and vital congregations (including Peter Kaldor, *Shaping a Future: Characteristics of Vital Congregations*, 1991).

ATTRACTION OF NEW MEMBERS

I. LEVELS OF NEWCOMERS: the ability to attract newcomers (e.g., the relative percentage of people who were not members of the congregation five years ago.)

	1	2	3	4	5
Statement #:					
25. Each year, we attract a number of newcomers equal to at least 10% of our membership.					
28. We attract new participants to our congregation on a regular basis.					
30. We have persons in our congregation who provide welcome and follow up to visitors and newcomers.					

II. NUMERICAL GROWTH: The growth rate of church attendance at the congregation over the last five years. Note “attendance” is NOT the number of people in membership.

	1	2	3	4	5
Statement #:					
26. Attendance at worship services has increased over the last five years.					
24. Our congregation has grown in membership over the last five years					
37. We are well along in a specific strategic plan for our congregation’s growth and institutional development.					

COMMUNITY BUILDING

I. YOUNG ADULT MINISTRY AND INVOLVEMENT: the ability to retain young adults as active members of a Unitarian Universalist congregation or young adult ministry of the congregation (e.g., young adult group, campus ministry, etc.)

	1	2	3	4	5
Statement #:					
1. Our congregation attracts young adult (18-35 year old) newcomers.					
7. We have a core group of young adults to build upon for programming focused for this group within our congregation					
11. Our congregation listens to the experiences of young adults.					

II. SENSE OF BELONGING IN THE CONGREGATION: Members and participants feel a strong and growing sense of belonging to their congregation

	1	2	3	4	5
Statement #:					
5. Participants in our congregation are encouraged to be involved in its mission and ministry.					
14. A sense of belonging is nurtured and widespread within our congregation among various kinds of people.					
16. We are strong in our ability to integrate new members into the congregation.					

OUTWARDLY FOCUSED

I. COMMUNITY INVOLVMENT: The involvement of members in community activities both within and outside the church. This includes service, social action, etc.

	1	2	3	4	5
Statement #:					
15. Our congregation is visible and well-known in its community.					
18. We support and encourage members in their contacts and involvement within the community around us.					
23. Our congregation has regularly studied the needs of the community around our congregation as a basis for planning.					

II. SHARING FAITH AND INVITING OTHERS: The willingness of members to discuss their faith with others and invite others to congregation activities

	1	2	3	4	5
Statement #:					
2. Members are encouraged to invite others to visit the congregation.					
3. Members feel comfortable talking about their Unitarian Universalist faith with others <i>outside</i> of the congregation.					
22. Training and/or support is available to members to help them to share their faith and to witness to their faith values					

ONGOING EXPLORATION OF FAITH

I. LIFESPAN RELIGIOUS GROWTH: Faith development of people of all ages is valued in the life of the congregation.

	1	2	3	4	5
Statement #:					
4. Adult members have opportunities to develop their UU faith and its meaning for them <i>within</i> the congregation.					
10. Our congregation values our ministry to its children and families through religious education, and other programs and activities.					
29. Members of our congregation value youth ministry..					

II. WORSHIP: Worship content and style that inspires and challenges members and visitors, old and young alike.

	1	2	3	4	5
Statement #:					
21. Our worship inspires and supports the spiritual growth of our congregation.					
27. Young adults feel positive about the worship style of our congregation.					
33. Our worship provides the challenge and inspiration we need to live out our faith in the world.					

MISSION FOCUSED LEADERSHIP

I. SENSE OF DIRECTION: A clear sense of mission and purpose, with a plan for next steps.

	1	2	3	4	5
Statement #:					
12. Our congregation is open to new initiatives for ways of doing things.					
13. Our congregation has a sense of direction for the future.					
17. The mission priorities of our congregation are clear and can be described by many members.					

II. LEADERSHIP SUPPORT AND TRAINING: Volunteers are given what they need to do their jobs.

	1	2	3	4	5
Statement #:					
6. People with leadership roles are given support, encouragement and resources.					
34. Members are encouraged to use their gifts and skills...					
35. Training and support is available to members in their leadership roles.					

III. CLARITY OF EXPECTATIONS AND ASSESSMENT:

Leadership roles, fair compensation, and transformational processes are clear.

	1	2	3	4	5
Statement #:					
36. We have assessed our congregation's progress toward becoming an anti-racist and multi-cultural congregation.					
38. We have made progress on a specific plan toward paying fair compensation to all our employees					
39 Expectations and roles of paid professionals and volunteer leaders are clear and well-understood.					

RESOURCES

I. STEWARDSHIP: The congregation elicits generosity with time, money.

	1	2	3	4	5
Statement #:					
9. Our congregation inspires generosity and raises enough money to pay fair compensation and support programs					
20. Our congregation handles capital financial needs well through fundraising, endowment and or deferred giving.					
32. Our congregation raises substantial funds for outreach to good projects and causes it supports.					

II. FACILITIES: Adequate space, parking, and infrastructure for present programs and for growth.

	1	2	3	4	5
Statement #:					
8. Our worship space is beautiful, maintained and large enough to accommodate our congregation.					
19. The religious education and fellowship spaces are adequate and well kept.					
31. Our infrastructure (roof, offices, computer, kitchen, parking, etc.) is adequate and fully accessible.					

SECTION 4: SUMMARY OF OUR CONGREGATIONAL SELF-ASSESSMENT:

After reviewing the results of “Section 3: The Interpretation of Scores”, reflect as a group on your responses to the following statements and compose a summary of your congregational self-assessment here.

A. Our congregation’s perceived strengths are:

B. Our congregation’s perceived potential strengths are:

C. Our perceived challenges are:

SECTION 5: RECOMMENDATIONS FOR ACTION

This is a part of the self-assessment that you may want to do as a leadership team or you may want to delegate to appropriate task forces within your congregation. You may also want to work with a consultant from your district or from the continental UUA staff to help you develop a plan for improving some of the particular areas of congregational life.

Instructions: This section is intended to carry your assessment further by recommending some actions to take (a) to “tweak” or build on current strengths you have in this area OR (b) to significantly change your current practices OR (c) to remove barriers to your progress in this area (i.e., stop doing something).

	RECOMMENDED ACTIONS:		
	To “Tweak” or build upon current strengths you have in this area:	To significantly change your current practices	To remove barriers to your progress in this area:
LEVELS OF NEWCOMERS: the ability to attract newcomers (e.g., the relative % of people who were not members five years ago.)			
YOUNG ADULT RETENTION: the ability to retain young adults as active members of a Unitarian Universalist congregation or young adult ministry of the congregation (e.g., young adult group, campus ministry, etc.)			
NUMERICAL GROWTH: The growth rate of church attendance at the congregation over the last five years. Note “attendance” is different than the number of people in membership.			
SENSE OF BELONGING IN THE CONGREGATION: Members and participants feel a strong sense of belonging to their congregation.			

	RECOMMENDED ACTIONS:		
	To “Tweak” or build upon current strengths you have in this area:	To significantly change your current practices	To remove barriers to your progress in this area:
COMMUNITY INVOLVEMENT: The involvement of members in community activities both within and outside the church. This includes involvement in community services, social action, etc.			
SHARING FAITH AND INVITING OTHERS: The willingness of members to discuss their faith with others and invite others to congregation activities.			
GROWING IN FAITH: Faith development of people of all ages is valued in the life of the congregation.			
SENSE OF DIRECTION: A clear sense of mission and purpose, with a plan for next steps.			
WORSHIP: Music, message, and more – inspiring members and visitors, old and young alike.			
LEADERSHIP SUPPORT AND TRAINING: Volunteers are given what they need to do their jobs.			
STEWARDSHIP: The congregation elicits generosity with time, money.			
FACILITIES: Adequate space, parking, and infrastructure for present programs, accessibility and for growth.			
CLARITY OF EXPECTATIONS AND ROLES: Leadership roles, fair compensation, and transformational processes are clear.			

V. YOUR CONGREGATION'S RELATIONSHIP TO THE COMMUNITY

Obtaining a perspective of your congregation from the “outside-in” can be helpful as you are assessing the effectiveness of your congregation as a religious presence and resource for justice making within your surrounding community.

The information from the activities listed below can often provide insights for building on your congregation's current strengths in relating to your surrounding community. Moreover, many congregations have found it helpful to know how they are perceived in the community. The surrounding community's perception (1) may impact a congregation's capacity to attract newcomers and/or (2) may influence the frequency that the community calls upon the congregation as a resource for social justice or community service.

Instructions for the Community Interview Team:

Step one: The team completes “Step I: Reflections On Our Relationship with Our Community”. This is an exercise to help the team form their own impressions of the congregation's relationship with the community.

Step two: From the “Reflections” in step one, the team may decide to add new questions or revisions to the Sample Interview Questions (Part II).

Step three: Develop a list of community leaders who you feel it would be important to talk with and interview. Review the list of sample questions below and adapt them as you feel you need to.

Step four: At least three members of your congregation agree to interview at least 5 people on the list from Step Three.

Step five: This interview team gathers to summarize their interviews in a final report. Reflect on this summary in order to discern key insights and recommendations for how to improve your congregation's relationship with its surrounding community.

STEP I: REFLECTIONS ON OUR RELATIONSHIP WITH OUR COMMUNITY

Questions for Study Team¹ :

1. What role does your congregation play in the place that it is located?
2. What kind of reputation does your congregation have in your community?
3. What is the relationship between your congregation and the other congregations in the community?
4. What ministries, programs, events and activities in the community receive the support of your church?
5. What community leadership roles are filled by active members of your congregation?
6. How does the community relate to your congregation? Embraces, holds at a distance, rejects?

STEP II: COMMUNITY LEADERS QUESTIONNAIRE (SAMPLE QUESTIONS):

Introduce yourself and tell the interviewee of the purpose of your interview.

1. What major changes do you see occurring in our community? What do you think is causing these changes?
2. Talk about this community's strengths and weaknesses.
3. What organizations (agencies, congregations, etc.) do you know of that are doing an especially good in doing something about these problems and/or contributing to the community?

¹ adapted from Jung and Agria, *Rural Congregational Studies* and from Ammerman, Carroll, Dudley and McKinney, *Studying Congregations*:

4. What do you know about [name of congregation]?

5. Do you have any thoughts on what our congregation do to make a better contribution to the community?

6. What do you think are the major problems or trends in the community that may impact us in the next 5 to 10 years?

A Process for a Congregational Self-Assessment and Planning Retreat

Developed by Nancy Bowen and Howell Lind

A PROCESS FOR A CONGREGATIONAL SELF-ASSESSMENT AND PLANNING RETREAT

This process is ideal for a congregation that wants to incorporate congregational assessment into an annual leadership or congregational retreat. Included in this section is (a) a suggested process for a one-day congregational self-assessment and planning retreat and (b) an optional short congregational self-assessment form that can be used as part of the planning retreat process.

9:00 **Worship**

9:15 **Introductions**

9:30 **Present the focus for the day:**

- Purpose: Why is our congregation here?
- Vision: Who are we and how do we want to be?
- Mission: What shall we do?

10:30 **Start small group discussions:**

With the purpose, vision and mission conversation in mind divide into small groups to brainstorm possibilities for the coming year. The procedure below can be used or adapted:

Step One: Choose a congregational area for each group to consider.

Break the whole group into small groups. Each group will focus on one area of congregational life.

A small congregation might consider these categories:

- Program (worship, religious education, new members, fellowship)
- Organizational (cavass, bylaws, capital campaign, structure)
- Outreach (evangelism and social justice)

A larger congregation might use standing committee categories. The composition of the small groups should not be by committee membership, however.

- Religious Education
- Social Justice
- Membership
- Building and grounds
- Sunday services
- General administration

Step Two: Discuss the area of congregational life within the small group.

Within each small group on a topic area, each small group discussion could consider any of the following questions:

1. What is the most exciting thing we have done this year in this area?
2. What strengths does it demonstrate?
3. How can we build on that strength?
4. What input from the congregational assessment form (if used) can inform our discussion?
5. What would you like to see in this area this year?

Step Three: Brainstorm ways to act on the insights gained from the small group discussion.

Following the small group discussion, the group should brainstorm ideas for strengthening or building upon this area of congregational life. When brainstorming ideas are generated without comment or judgment within a specified amount of time.

Step Four: Choosing and developing ideas for action within.

Once the small group has brainstormed a list of ideas, then, the small group should choose three ideas it wants to develop further.

For each of the three ideas the group has chosen, the group will then develop a plan on newsprint for each idea by asking:

1. Can this be accomplished in a year? Is this a goal for next year?
2. What timeline is reasonable if it is to be accomplished?
3. Who might be interested in making this happen?
4. Is there a budgetary consideration for the projects in this area?
5. What recommendations can we make about the budget for these projects?

12:00 Plans are posted and the whole group votes.

Small groups post the newsprint with their developed ideas on the wall for everyone to review.

Give everyone 5 colored dots with which to vote for their favorite ideas. In voting for an idea or project, a participant is not promising to personally do what he or she votes for—he or she is only promising to be enthusiastic and supportive of this project proceeding. Vote during the lunch break.

12:15 Lunch and Fellowship Time

Facilitator and subcommittee count the votes during lunch in order to present to the group the 4 or 5 ideas or projects that received the most support.

1:15 Report the vote and then establish new small groups.

The groups can be self-selecting or random:

- (a) Option one: Self-selected groups. Ask participants to form a group with others interested in developing further one of the 4 or 5 ideas or projects that received the most support. If a group does not form to develop a specific idea, then this is an indication that there is not enough support or interest to proceed with this idea or project.

- (b) Option two: Random Groups. You may want to number off so that participants are asked to work on goals for which they did not vote.

1:30 Small groups develop action plans for the top priorities.

Each small group works on developing a plan for an idea more fully. In the discussions and plan, the small group may want to indicate:

- The current strength that you are building upon
- The initial action steps
- A timeline for completion in one year
- What communication with other committees or groups is planned
- Who will take primary responsibility for an action (staff, committee, or individual)
- What will you need to stop doing in order to accomplish this task?
- Barriers to accomplishing the goals that you can discern.
- Strategies you have for addressing these barriers.
- How you will evaluate and monitor this project.

3:00 Small groups report their action plans and the whole group discusses them.

Each small group presents its plan to the whole group.

After, the plans are presented the whole group of participants should consider the following questions:

1. Do any of the plans seem too ambitious to accomplish?
2. Is each plan accomplishable in a year?
3. If not, can the plan be distributed over a two year period? If so, what are the actions that are possible during this first year?

After the discussion of the plans, it is advisable that the whole group determines the top three plans that it is willing to commit to for this next year.

3:30 Accepting responsibility for the plans accepted as priorities.

Ask the following questions:

1. Who (which individual or group) will accept responsibility for the first step and by which date?
2. What will the Board need to do to support these new initiatives?
3. How will honoring these priorities shape the work of the committees and the Board?
4. Is there anything that Boards or committees need to stop doing in order to accomplish these priorities?
5. Who needs to be informed about these priorities?
6. How, when and by whom will these goals be communicated with the congregation?
7. Who on the board will be the liaison for each of these initiatives?

If the initial round of questions falls short on answers go to the next goal and ask the same questions. If one or more goals engenders no energy or commitment you may drop this goal or refer it to the appropriate committee for their reaction and response. Ask, "If the committee doesn't want to pursue this goal, does the Board want to advocate for it?"

4:00 Closing Comments.

Include a time for sharing the "joys and concerns" for the day.

4:15 Closing worship

You may also want to include a printed evaluation form for participants to write their comments.

CONGREGATIONAL SELF-ASSESSMENT FORM

For the following statements, please circle the appropriate number. Your response in the left hand column is your assessment our congregation. Your response in the right had column indicates how important this item is to you. The results of this assessment can inform your congregation's annual planning retreat.

- (5) Strongly Agree
- (4) Agree
- (3) Neither Agree nor Disagree
- (2) Disagree
- (1) Strongly Disagree

- (5) Very Important to Me
- (4) Important to Me
- (3) Neither Important nor Unimportant
- (2) Relatively Unimportant to Me
- (1) Not Important to Me at All

HOW IS OUR CONGREGATION DOING?

HOW IMPORTANT IS THIS TO ME?

- | | | |
|---------------------|--|---------------------|
| (5) (4) (3) (2) (1) | A. Our congregation has a sense of community, caring, warmth, friendliness, supportiveness, et cetera. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | B. Our congregation warmly and openly welcomes visitors and newcomers. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | C. Our congregation has good morale: members are interested in our congregation and their fellow members. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | D. Our congregation provides and opportunity for an individuals spiritual journey and growth. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | E. Our congregation's community forums, social justice initiatives, book discussions, and new members classes are varied and worthwhile. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | F. Our children's religious education program provides a rewarding experience for our children. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | G. Our adult religious education program provides a rewarding experience for our adults. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | H. The overall format of the Sunday service is good. | (5) (4) (3) (2) (1) |

HOW IS OUR CONGREGATION DOING? HOW IMPORTANT IS THIS TO ME?

- | | | |
|---------------------|---|---------------------|
| (5) (4) (3) (2) (1) | I. The overall quality of our Sunday services is good. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | J. The overall quality of the music programs for our Sunday services is good. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | K. Our congregation has an interesting variety of social activities and events for members to get together. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | L. Our congregation is aware of and involved in local community affairs and issues. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | M. Our congregation shows a concern for national and international issues. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | N. Our congregation communicates an awareness and connection to our district and continental UUA | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | O. Our facilities are adequate for our staff, our congregation and its needs. | (5) (4) (3) (2) (1) |
| (5) (4) (3) (2) (1) | P. The present method of raising funds for our congregation is satisfactory. | (5) (4) (3) (2) (1) |

Please name three things that you like about your congregations:

1. _____
2. _____
3. _____

Please name three things that you think need improvement about our congregation:

1. _____
2. _____
3. _____

[Check one] I am a member of this congregation ____, I am a friend of the congregation ____.

[Check one] My participation in the worship, events and activities of this congregation is frequent_____, occasional____, infrequent____.

An Interactive Web-based Self-Assessment Process for Congregations

Developed by Faith Communities Today

*A Project Coordinated by Hartford Institute for Religious Research
Involving over 41 Different Denominations and Faith Groups,
Including the Unitarian Universalist Association*

FAITH COMMUNITIES TODAY INTERACTIVE WORKBOOK FOR CONGREGATIONAL ASSESSMENT AND REFLECTION

Faith Communities Today, FACT, is the result of the Cooperative Congregational Studies Project funded by the Lilly Endowment and by all participating groups. It is coordinated and managed by Hartford Institute for Religion Research at Hartford Seminary, Hartford, CT.

As one of the 41 participating faith groups, the Unitarian Universalist Association surveyed its congregations, with a 50% return rate. Participating groups are now making the results of this interfaith survey available and useful to congregations.

As part of this effort, you are invited to use this interactive workbook on the website listed below as a way to assess your congregation and compare it to other Unitarian Universalist congregations and to other faith groups in the following five areas:

- Public worship
- Spiritual growth
- Inviting and including
- Community outreach
- Managing and leading

The process outlined on this website can be used by an individual member of a congregation or, even better, by a facilitator for a group within the congregation. Instructions are provided for either approach on the website.

Some of the Instructions for the interactive workbook are included in this section, but they are also on the website.

To access the interactive workbook, please enter the following URL in your web browser:

<http://fact.hartsem.edu/Workbooks/intro.htm>

After taking the survey on line or entering your congregational group's results, you will get a customized table of your results. Then, you can go to the reflection questions to think through your results and to determine some implications of the results (similar to the "Act with FACT" page included in this section.)

Lawrence Palmieri Peers
Extension Education and Research Director
Unitarian Universalist Association

Instructional Handout on using the Interactive Workbook Survey

- 1) Sign in to use the Interactive Workbook section of the site and proceed to the assessment page.
- 2) Select one of the workbook areas of focus that you will see on the left navigational bar.
- 3) After you select an area, its corresponding survey of questions from that focus area will appear on screen.
- 4) Take the survey online, as you want to answer the questions or to reflect your group's average scores, by clicking on the radio buttons [small circle with a smaller dot in the middle] for each question. When you are through, submit your answers for processing by using the large button at the bottom of that survey page.
- 5) You will then see a page of choices for customizing your comparisons. You have to make choices for three items:
 - a. **First**, choose one denomination or religious group (preferably your own tradition or affiliation) as a primary comparison group.
 - b. **Second**, scroll down the page and choose another religious group as a second comparison group **OR** you may choose one of the Protestant groupings. **Note: you should not choose both a religious group and a Protestant grouping for your second choice.**
 - c. **Third**, scroll a little farther and choose from **one up to three** additional demographic descriptors to create a third comparison group similar to your congregation or matching your interests.

****Note:** if you want to change any of your comparison selections, you must reset the entire page and select all of the comparison categories again.

- 6) After you submit these choices, it will take 30 to 60 seconds for you to receive a customized table of your results, compared to the total FACT survey, and your three choices of comparison categories. **Note: These results will appear in a new browser window.** For each question you will receive a comparison table of the response percentages and a chart of the overall U.S. total scores.

I. Public Worship

1. Our congregation's worship services are spiritually uplifting and inspirational

	Your Score	U.S. Total	Faith Group One	Faith Group Two	Other Choices
Very Well		30%	47%	34%	30%
Quite Well		54%	41%	48%	53%
Somewhat		17%	9%	15%	

your score (points to Your Score column)

your 1st Faith Group choice (points to Faith Group One column)

your 2nd Faith Group Choice (points to Faith Group Two column)

The scores of all the U.S. congregations (points to U.S. Total column)

the combined scores of your 1 to 3 demographic comparison choices (points to Other Choices column)

We recommend that you print out the results page and then continue on to the page of reflection questions for this topic. Print the results page if you want to keep a copy of your findings, since it will be available online only briefly after you leave the page.

Note: If you receive an "N/A" that means either the faith group you chose did not ask the question, or the demographic comparisons you put together resulted in less than 100 cases and the system would not display the findings. Try again with different choices.

7) Use the large button at the bottom of the results page to move to the reflection questions. After you can then return to the interactive survey page and repeat these steps for the other areas of the workbook.

ACT with FACT

Now that you have completed one or all the sections of the workbook and thought some about the results, don't stop there!

You can explore the **questions, suggestions, and links** below to continue this FACT finding journey. Or you may go back to interact further with the survey and findings.

General Reflection Questions:

What is most interesting or surprising about your congregation's score?

How does the average score of your congregation compare with:

- national averages for your faith group/denomination?
- overall scores for all participating faith groups?

Based upon this information, what specific issues or topics would you most want to further study and explore?

Further reflection on the survey information:

- What does the data say about our local congregation?
- What does the data say about our national faith group/denomination?
- What does the data say about congregations based upon location or other factors?
- What does this research information mean for us?
- What actions can we take to enhance our congregation?
- What needs to be preserved, avoided, achieved?

Action Implications -Planning for our Congregation

How can we use what we learn to make a difference in what we do? What do we need to:

a) preserve/sustain?

b) avoid/reduce?

c) enhance/achieve?



FAITH
Communities
TODAY

INTERACT
WITH
FACT

A Participant's study guide for a congregational exploration of the largest data set of information ever about religious congregations in the United States

Introduction to the Faith Communities Today Project

Faith Communities Today, (FACT) is the result of the Cooperative Congregational Studies Project funded by the Lilly Endowment and by the participating religious groups. It is coordinated and managed by the Hartford Institute for Religion Research at Hartford Seminary, Hartford, CT, www.hartfordinstitute.org.

FACT is a survey of congregations representing 41 denominations and faith groups. Project participants developed a common, key informant questionnaire. Each group was able to adapt this common core questionnaire to reflect their particular tradition. Each group also adapted the project guidelines to draw its own sample of faith communities - minimally intended to provide an +/- 4% error rate. Each denominational and religious group conducted its own, most often mailed, survey using this form. The first survey was fielded late fall, 1999. The final survey was handed out in late summer, 2000.

The common core questionnaire contains 336 variables covering six broad areas:

- Worship and identity
- Location and facilities
- Internal and mission oriented programs
- Leadership and organizational dynamics
- Participant characteristics
- Finances

Survey return rates range from 35% to 97% and average just over 60%. The number of returned questionnaires varies somewhat by religious group, but the findings have been adjusted to match a group's size on the U.S. religious scene. The total database includes 14,301 congregations.

The research findings are being disseminated to many audiences including:

- Lay and ordained leaders of congregations
- Denominational leaders at all levels
- Seminary faculty, students and administration
- Scholars of religion and the social sciences
- The public through interfaith conversations and a variety of news media.

Similar to the development of the questionnaire, participating groups worked cooperatively to develop generic print, video and web reports that each denomination and faith group is responsible for disseminating to its respective audiences.

For up-to-date information, contact your denominational office or web site, and/or visit the FACT web site at <http://fact.hartsem.edu> or contact the co-directors at fact@hartsem.edu.

What your group will do when using the workbook

What is a workbook?

The workbook you are about to use is an *interactive study guide* that allows you to answer some of the FACT survey questions. Your group leader will then compare your answers to those of other groups who took the survey. After you receive this comparison, you will reflect with your group leader on the findings and their implications for your life of faith.

What good is an interactive workbook that explores survey data for my congregation?

- We believe that every individual, every congregation can learn more about themselves by reflecting on how they are similar and different from other faithful people.
- Through this reflection on the complementary faith commitments and rituals as well as on the unique gifts and worship styles, we are certain that persons can gain a greater understanding and appreciation of themselves and other faithful people.
- The Faith Communities Today study allows congregations, to see themselves compared to others within their faith tradition and from an interfaith perspective. This objective mirror will stimulate conversation, and perhaps even challenge individuals and congregations about the future of their communal embodiment of the faith.

Exactly what will we be doing?

You will *Assess* - First you will answer a few survey questions on one or all of the following individual topics:

- public worship,
- spiritual growth,
- inviting and including,
- community outreach, and
- managing and leading

You will *Compare* - Next, your group leader will process your answers and then go online and compare your congregation's scores to three comparison partners,

- your own faith group,
- another faith tradition, and
- up to three descriptor categories such as the answers of large congregations, within the western region of the US, and who were growing in size.

You will *Talk*, discuss, and reflect - Finally, your group will come back together to reflect on and talk about your results and the implications of the comparisons you found. This honest reflection about how you compare to others, what seems most surprising to you or your group, and what does this mean for your own, or your group's, faith practices and faith journey is where much of the learning of this interactive exercise will take place.

We hope you enjoy this exploration!