



# Global Ends Monitoring Report

June 2018

## Global End 1.0

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 which assures institutional sustainability.

## Summary Interpretation

The foundation of a healthy Unitarian Universalist community is vibrant UU congregations and communities that reflect spiritual and theological depth, anti-racist, anti-oppressive and multicultural practices, and a clear and active commitment to making a positive/transforming difference both within and beyond their communities. In other words, congregations and communities striving to live into Beloved Community.

Critical for the success of our congregations are professional and lay leaders equipped for mission-driven, multicultural ministry that embraces change, navigates conflict in positive ways, tends to the spiritual growth of people at all ages of life, and connects a sense of larger purpose to the heart of the community. In other words, key to living into Beloved Community are leaders who understand and are equipped to help lead this cultural and spiritual change.

Institutional sustainability is a reflection of the operational and financial well being of the Association, and the financial capacity to live the pastoral and prophetic ministry we are called to in the world. Institutional sustainability is not the expectation that the UUA and our larger faith will continue in perpetuity, but the balance of financial health alongside clear indicators of mission impact and growth in our congregations and communities. We understand diversity in many forms as a key aspect of a sustainable faith movement. An additional marker of overall institutional sustainability is the financial well-being of our congregations and of our religious professionals.

## Metrics

- Dashboard Item 1 – Adult Members
- Dashboard Item 2 – Religious Education Enrollment
- Dashboard Item 3 – Non-member Friends
- Dashboard Item 4 – Sunday Attendance
- Dashboard Item 5 - Total congregations and covenanting communities

**Future Metrics:** *These are measures we wish to track but first must create systems, processes or improved ways to track these measures.*

- Revise metrics on “non-member friends” and “Sunday attendance” to capture broad participation, or the overall community served by a congregation.
- Report annually on the total number of people receiving credentials as religious professionals and the number of people in process for Lay Ministry certification and graduates, including measuring for diversity in each group. Track trends over time, establish baseline to create goals.

- Establish a few regular indicators to measure institutional sustainability. For example: what measures might indicate endowment health, ratios of endowment to operations that reflect long term sustainability, goals for long term-strategic budgeting to correspond with 3-5 year strategic plans. This implementation goal is delayed to FY 2019 because the creation of Mission Budget took priority this year.

## Ends Policy 1.1

Congregations and communities are covenanted, accountable, healthy and mission driven

### Summary Interpretation

Unitarian Universalist congregations and communities are the primary ways that our vision, values and mission are lived in the world. Communities that are covenanted and accountable hold the practices of right relationship, interdependence and a sense of responsibility and connection to themselves, other congregations, to our history and ancestors, to those who are yet to come to Unitarian Universalism, and to our collective humanity and core values. Congregations that are healthy and mission-driven have a clear sense of purpose beyond themselves which nurtures a vital, alive, and growing sense of ministry, generosity and commitment.

Communities that are covenanted, accountable, healthy and mission driven would have clear practices around covenant and be able to call on this in times of challenge and difficulty. Additionally, they would emerge from times of difficulty stronger having been clear about how their mission and values guide them, rather than allowing personalities or conflict-avoidance to drive decisions and undermine mission. Indicators would include that communities have right relations covenants and safe congregation policies. These congregations would support their religious professionals being a part of UU professional organizations (with resources for professional development), and their leaders participating in leadership development opportunities to support best practices and models for healthy ministry. We would see healthy ministries for religious professionals thrive in these congregations. Additionally, qualitative indicators would reflect that congregations know their mission and feel that it guides their priorities, ministry and resources.

### Metrics

- Dashboard Item 6 – Integrated Mission
- Dashboard Item 7 - Anti-Racism Programs
- Dashboard Item 8 – Safe Congregations Policies
- Dashboard Item 9 – Total Congregational Expenditures

**Future Metrics:** *Creating metrics for these areas will take dedicated attention and partnership across staff groups and with professional organizations.*

- Develop regular indicators of success of ministries, with attention to identities of ministers. For example: length of ministry; lack of conflicted endings; other indicators [Establish baselines and track over time; also investigate ways to track this for other religious professionals]
- Percentage of congregations with religious professionals who are members of LREDA, UUMA, UUMN [Establish baselines and ways to measure]

## Ends Policy 1.2

Congregations and Communities see their covenant and partnership with the UUA and other congregations as a critical support to deepen the spiritual and religious development of their people, enhance their mission and operations, and spread the ideals and principles of Unitarian Universalism.

## Summary Interpretation

Equipping congregations for healthy, vital ministry is part of the core mission of the UUA. To live this mission means that congregations and communities feel that their covenantal relationship and participation with the UUA and other congregations makes them more effective at living their mission and supports both the religious development of their people and health of their communities. Recognizing that being able to give as well as receive support are both apart of healthy communities and covenantal relationships, communities would experience their partnership with the UUA and other congregations as enhancing their health and growth both when they are in need of support and resources and by finding ways to offer leadership and resources to the UUA and other congregations.

Indicators of the strength of covenant would be participation in UUA programs, use of UUA resources and services, as well as the congregations' and communities' financial generosity and covenanted commitment to the UUA. Additionally, positive qualitative measures about the quality and benefit of UUA support and resources would reflect our success in living into this end.

## Metrics

- Dashboard Item 10 – Annual Program Fund Attainment
- Dashboard Item 11 – General Assembly Participation
- Dashboard Item 12 – Certification Completion

### ***Future Metrics:***

- Set clear goals around attainment and percentage of congregations that are Honor congregations after we move through the Transition to new APF (in 2 years)
- Create annual question in Congregational Questionnaire about the degree to which UUA resources support the spiritual and religious exploration in the congregation (offer comments for more qualitative data)
- Create annual question in Congregational Questionnaire about the degree to which UUA enhances congregation operations (qualitative). Include in question, an invitation for congregations to consider ways they provide leadership to others as a source of positive impact.
- Measure the frequency, or last time, UUA staff (regional or national) have engaged with the congregation. Include general assessment of the usefulness of engagement.

## Ends Policy 1.3

Congregations and communities are intentionally inclusive, multigenerational and multicultural.

## Summary Interpretation

The theological foundation of Unitarian Universalism is an expression of radical hospitality and inclusive community. Universalism teaches that no one is outside of the circle of love. Our congregations and communities live into the fullness of this calling when we intentionally create inclusive, multicultural and multigenerational community. In the context of a society rooted in a culture of white supremacy with systemic discrimination based on race, gender, sexuality, ability and other identities, it requires intentionality and commitment as well as skill building, resources and practice to create an adaptive and inclusive culture that does not reflect just one dominant identity. Living into this vision will require intentional investment in resources and skill building for congregations and investing specifically in the leadership and success of people whose identities have been marginalized in our tradition.

Additionally, this work requires being honest and clear about the social and institutional realities that perpetuate inequitable impacts for people who hold identities that have been marginalized. A lesson from the Welcoming Congregation program is that to be fully inclusive means understanding and being in solidarity with LGBTQ communities in the issues that most impact their lives and liberation. This requires developing a culture that welcomes difference, invites dynamic relationships that make room for learning and change, accepts vulnerability and risk, and offers forgiveness and grace. It also requires public and partner-based engagement with the justice issues which drive societal oppression, and showing up for the liberation struggles of those who have been most impacted.

Indicators that our congregations are growing as inclusive, multigenerational and multicultural communities would include growing racial and ethnic diversity in our membership and leadership, and increasing opportunities for religious professionals of color and their success in ministries and leadership positions. Qualitative indicators would reflect whether people who hold identities have been marginalized feel reflected, seen and centered in our faith. This is long haul cultural change work and we will improve with time our ability to measure and determine appropriate indicators over time.

## Metrics

- Dashboard Item 12 – Congregational Racial Diversity
- Dashboard Item 13 – UUA Staff Racial Diversity
- Racial diversity goals of UUA staff – 30% people of color/indigenous (POCI) overall; 40% POCI among senior leaders

**Future Metrics:** *Tracking these measures will require new processes and security protocols to protect people's identity information. We should also explore ways to get qualitative data from members and from POCI members of their experience, including in congregations and communities.*

- Diversity of UUA committees and leadership teams.

- Tracking number of religious professionals of color (establish baseline, set goals for increase over time). Measure success/outcomes for religious professionals of color (metric also shows up in 1.0)
- Qualitative information on how members and POCI UU's see the cultures of our congregations and communities with indicators of how we are moving away from norms associated with white supremacy culture to norms associated with multicultural community.

## End 1.4

Congregations and communities engage in partnerships to counter racism, oppression and systemic white supremacy.

### Summary Interpretation

The UUA, congregations, and communities will be effective partners in making measurable change in dismantling systems of white supremacy and oppression, with specific focus on issues that most closely touch our core values, including issues of equity with respect to identity and issues of climate justice. To be most effective in really dismantling systems of racism and oppression, we will put a priority on partnership and following the lead of directly impacted communities and organizations that are primarily led by and representative of POCI.

UU congregations and communities are places and spaces where organizing is supported, where directly impacted communities can find support and safe space.

### Metrics

Monitoring for this end are measured at the program or community level.

***Future Metrics:*** Additional discernment is needed to think about how we measure impact and outcomes with this end. The fact of partnership is just one piece of the work. We could measure length of partnership, but questions remain of how to measure quality and impact of partnership.

- Measure congregational engagement in partnership
- Measure how many partnerships are with groups primarily led by people of color or the most directly impacted (organizers, EDs, members) – establish baseline, investigate goal of 75%
- Ask congregations to report on specific justice impacts or “wins”
- Measure local, regional or national wins on: dismantling mass incarceration and racist policing (criminalization), climate justice, immigrant rights, GLBT rights, GLBT disability rights, and climate justice



## End 1.5

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

## Summary Interpretation

As the largest organization within the landscape of Unitarian Universalism, we have a role to play in supporting and being collaborative partners with other UU institutions including the UUSC, UU professional organizations, the UUWF, and UU theological schools.

## Metrics

***Future Potential Goals and Metrics:*** Additional generative conversation is needed with the Board and Leadership to create a dynamic interpretation of this End and how we might measure success.