2016

Unitarian Universalist Association
Ends Monitoring Report
April 2016

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PROLOGUE TO INTERPRETATION

The UUA Administration believes in the power of our liberal religious values to change lives and change the world. We understand that healthy Unitarian Universalist congregations and communities are the primary means of creating this transformation, especially when they understand themselves as part of a larger movement focused outward. We see the role of the Association as empowering and inspiring those congregations and communities to join together to increase the expression of Unitarian Universalist values in the world.

The congregations and communities themselves do the work and make the changes this evolving world calls for. We understand the UUA staff to be accountable for ensuring that these communities have the tools and engage in the practices that make them healthier and more impactful. In addition, the UUA creates the infrastructure for new kinds of communities to emerge and is accountable for raising the general public recognition of the relevance of UU values in today's world.

We realize that the UUA as an institution, as well as the structures of our congregations and 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.

Sources of Metrics

The metrics in this report are derived from a number of sources. These include:

UUA Certification Process – data submitted by congregations on an annual basis, which include number of members, for the purpose of determining the allocated number of delegates to General Assembly, and other attendance and RE enrollment data. 100% of congregations (1,038 of 1,038) participated in the in 2016 UUA Certification process. For more information, see 2016 UUA Certification Report (PowerPoint).

UUA Congregational Questionnaire (2016 CQ) – data submitted by congregations at the time of UUA Certification, which include self-reported answers to a number of questions about their programs, services, and use of resources. 72% of all congregations (751 of 1,038) participated in the 2016 Congregational Questionnaire. For more information, see 2016 UUA Congregational Questionnaire Report (PDF).

Faith Communities Today study (2015 FACT) – Faith Communities Today is a series of ongoing research surveys and practical reports, about congregational life, conducted and published since 2000, by the Cooperative Congregations Studies Partnership, a multi-faith group of religious researchers and faith leaders. The research partnership includes members from 25+ different faith groups, working in conjunction with Hartford Institute for Religion Research, Hartford Seminary. The UUA pays to participate in this study and encourages congregational involvement in this every-five-year study. 46% (480 of 1,038) of all congregations participated in the 2015 FACT study. Learn more at FaithCommunitiesToday.org. For UUA-specific FACT data, see 2015 UUA FACT survey (PDF).

Staff group reports and metrics – various metrics from individual staff groups and departments.

ENDS MONITORING

1.0 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

With three exceptions, everything that needs to be further interpreted in this policy is fully defined in the lower level policies 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."

Unitarian Universalist community

We understand "Unitarian Universalist community" to include those who identify as Unitarian Universalists. Member congregations, covenanting communities, and related UU organizations, as well as those individuals who identify as UU but do not belong to any of these organizations or communities.

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 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.

Transforming power

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 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 the Insight Congregational Self-Assessment Tool (Insight), a self-assessment tool being developed by the UUA, and in focus-group conversations recorded as anecdotal evidence.

Institutional sustainability

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 60% of major strategic programs designed to accomplish our Ends are being assessed with a formal process for determining 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 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

Program Assessment

All major strategic program initiatives have their own internal monitoring process, or, in a few cases, this process is under development. Areas of strategic focus and outcomes from these areas include:

> ➢ The Strategic Review of Professional Ministries

> - Fulfilling the Call (redefining ministerial competencies framework)
> - Recruitment videos
> - Summer Seminary (recruitment tool)
> - Continuing education partnerships with UUMA (Beyond the Call, Institutes)
> - Seminary partnerships (Panel on Theological Education)
> - Transitions Redesign
> - Economic Sustainability of Ministry Initiatives

> ➢ Professional development and support

> - Ministerial credentialing
> - Religious education credentialing
> - Music leadership credentialing
> - Curricula development and use
> - WorshipWeb
> - Church Staff Finances (insurance, fair compensation)
> - Endorsement and recruitment for military ministry
> - Finding Our Way Home, a retreat for religious professionals of color
> - TRUUsT retreat, a retreat for religious professionals who are transgender/gender-queer

> ➢ Public Witness & Social Justice

> - UU College of Social Justice
> - Commit2Respond
> - Standing on the Side of Love
> - Marriage Equality
> - Welcoming Congregation
> - Green Sanctuary
> - Accessibility and Inclusion Ministry (AIM)
> - Mosaic Makers
> - Moral Mondays/Selma/partnerships
> - Immigration action/new sanctuary movement
> - International Office
> - Shareholder advocacy
> - Support for congregational Black Lives Matter activism
> - Our Whole Lives

- ➢ Regionalization/ One UUA

    - ▪ Increased technological support for connection of dispersed staff
    - ▪ Integration of staff previously employed by districts only
    - ▪ Systems/website integration
    - ▪ Bringing resources into the Common Endowment
    - ▪ Greater collaboration among all staff due to the structure of the new building
    - ▪ Integration of data collection systems

- ➢ Outreach/Branding/Growth

    - ▪ New UUA.org
    - ▪ Congregational website template and other tools
    - ▪ Internal branding and alignment
    - ▪ Emerging Ministries including campus ministries

- ➢ General Assembly coordination and support

- ➢ Congregational direct support

    - ▪ Webinars
    - ▪ District/regional assemblies
    - ▪ Consultations
    - ▪ Leadership schools
    - ▪ Safe Congregations
    - ▪ Thrive schools for youth and young adults of color (also a justice priority)

- ➢ UUA Fundraising

    - ▪ Life's Calling
    - ▪ APF/GIFT

- ➢ Publications/Periodicals

    - ▪ UU World
    - ▪ Skinner House
    - ▪ Beacon Press
    - ▪ Common Read

1.0 Compliance

We report partial compliance as we continue to develop internal monitoring processes for some of these initiatives.

Results from internal assessments of these priorities are reflected in the data for the lesser policies below.

ENDS 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 to serve their members and 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, engaging advocacy and witness, and faithful generosity.

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 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 is evidenced by the majority of congregations and communities reporting a clear mission or purpose, exploring new approaches to their ministry in accordance with their mission, involvement in the congregation's programs, a safe congregation policy, ability to handle conflict without serious disruption, and increased capacity over time in above areas based on a self-assessment and reflection of 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 individuals, 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.

Monitoring Data

The Insight Congregational Self-Assessment Tool, which is intended to provide a structure for aligning UUA programming and resources toward helping congregations and communities fulfill the Ends of the Association, will be implemented by the end of 2016. In 2015, the Faith Communities Today (FACT) study, in combination with the annual Congregational Questionnaire (CQ), provided congregations with an opportunity to conduct a self-assessment. The available data is rich and deep, including health, vitality, growth, and mission-related data.

90% of congregations that responded to the 2016 CQ and 74.8% of congregations that responded to the FACT study report a clear mission or purpose. This is compared to 63.2% in 2010 (FACT).

Percentage of UU congregations reporting a clear mission or purpose

■ 2015 ■ 2010

	2015	2010
Strongly Agree	26.2%	14.5%
Agree	48.6%	48.7%
Neutral/Unsure	16.6%	20.3%
Disagree	7.3%	14.5%
Strong Disagree	1.3%	1.8%
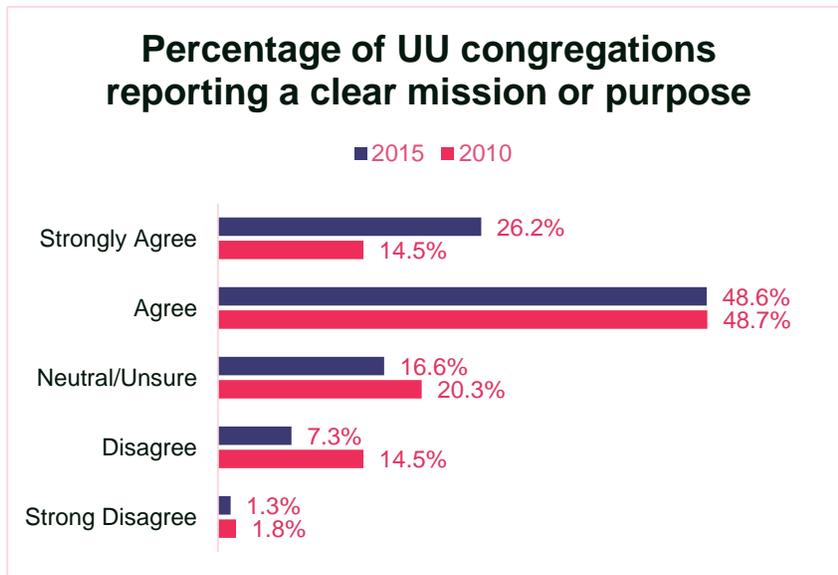
62% of all congregations that responded to the 2016 CQ have a Safe Congregations Policy. 79% of congregations with over fifty members have a Safe Congregations Policy.

Percentage of congregations with a Safe Congregations Policy

Categories: Corporate, Large Program, Midsize Pastoral, Transition, Program, Small Pastoral, Family
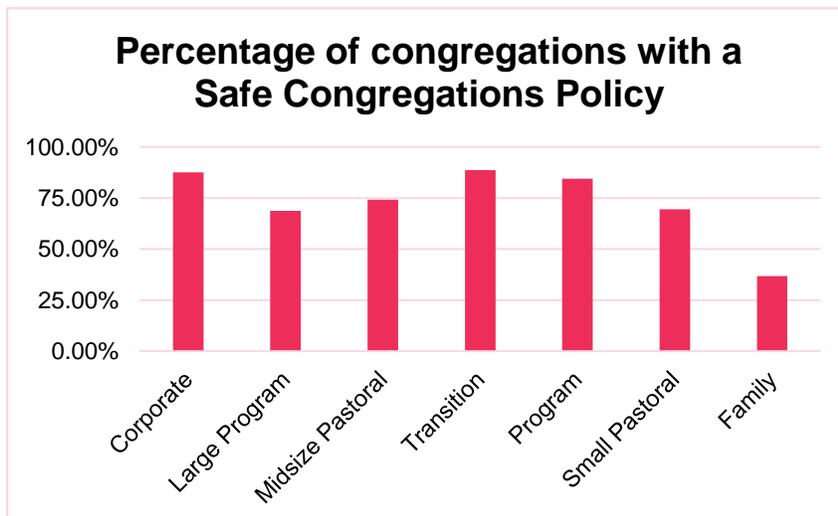
In 2015, 65% of congregations that responded to the FACT Survey report their participants are involved "a lot" or "quite a bit" in the congregation's programs, committees and service projects outside of worship.

Participants involvement beyond worship

A little
4%

A lot
13%

Some
30%

Quite a bit
53%
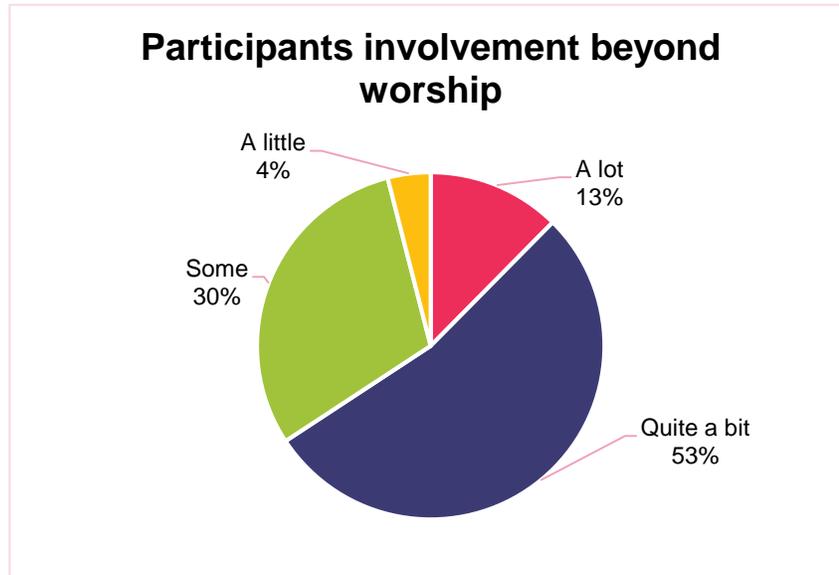
51% of congregation reported on the FACT survey that in the past five years their congregation has experienced no disagreements or conflicts (62) or has experienced conflict that wasn't considered serious (182).

1.1 Compliance

We report compliance.

Although Insight has not been completed, we believe the large participation of our congregations in the FACT survey, which the UUA supported and encouraged, provided a strong tool for our congregations' self-reflection and assessment.

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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.

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Interpretation

UUA staff will create and/or support programs and opportunities for congregations to learn together and gather together on cluster, district/regional, and national levels. Success will be evidenced by at least 75% of 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 structures (physically and virtually) for such gatherings, and encourage this as well by offering programs to groups of congregations, rather than just one-on-one.

Monitoring data

Almost 75% of congregations who responded to the 2016 CQ report having informal conversations with other congregations. More than half are engaged in a shared project or community event and almost 12% share staffing in some capacity. This shows that collaboration among congregations is strong.

Informal Conversation	Shared Project	Community Event	Shared Staffing
73.38%	61.04%	50.91%	11.43%

Participation in General Assembly and Regional/District Meetings

➢ 66% of all congregations sent representatives to General Assembly in 2015, compared to 64% in 2014.

➢ 52% of all congregations sent representatives to district/regional annual meetings, compared to 49% in 2014.

The demonstrates an increase in national and regional/district meeting participation, although it's important to note that the location of General Assembly can be a factor in participation.

1.2 Compliance

We report partial compliance.

We meet the compliance standard for individual and congregational participation in local, regional and national events, but do not meet the standards for individuals reporting that their work toward their mission has been enhanced. This is because of the lack of consistent evaluation surveys to assess impact of programs and a process for gathering data for participation in other cluster/district/regional trainings/programs/events.

ENDS POLICY 1.3

Congregations and communities are intentionally inclusive, multigenerational and multicultural.

Interpretation

1. Congregations and communities will engage in intentional self-reflection and cultural changes as evidenced by increased participation in learning arenas 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 inclusivity as evidenced by increased usage of relevant resources as well as participation in activities and partnerships that create border-crossing experiences.

3. UUA staff, volunteer structures, and policies will model inclusivity of age, identity and culture as evidenced by increased diversity 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 and to discover, highlight and partner with best practices in communities that achieve high levels of inclusion.

Monitoring data

1. Intentional self-reflection and culture change

    According to the 2016 CQ, at least half of congregations transition size or larger and over 85% of large and corporate size congregations, have engaged in a multicultural learning program, such as Mosaic Makers, Building the World We Dream About, Beyond Categorical Thinking, the Intercultural Development Inventory, or Beloved Conversations.

Have you engaged in a multicultural learning program?
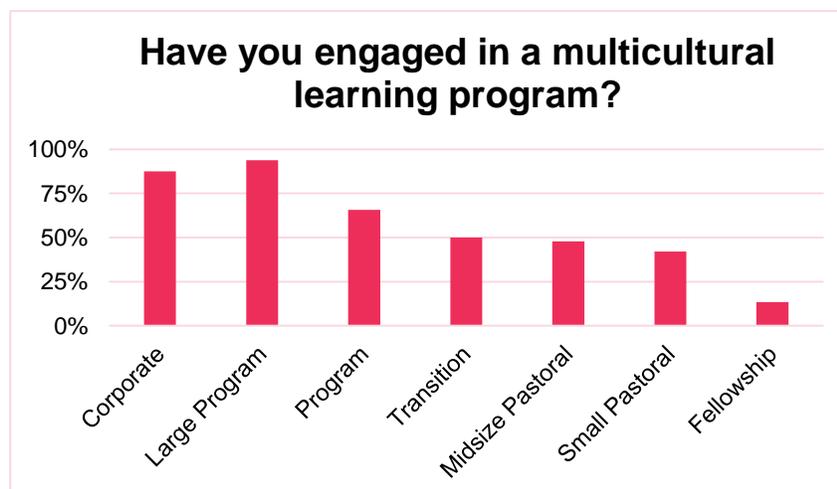
Eighteen percent (18%) of congregations responding to the FACT survey report that people of color comprise 10% of more of their congregations.

**Percentage of People of Color in the Congregation**

25-49%
2%

10-24%
16%

<10%
82%
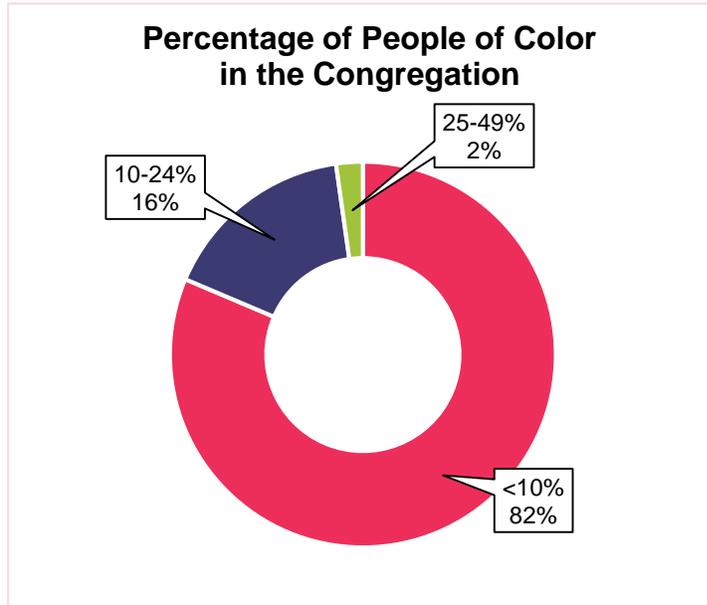
Our Whole Lives, especially OWL 7-9, has high rates of adoption by congregations of all sizes, according to those who responded to the FACT survey.

Our Whole Lives by level & size (2015)

- OWL Adults
- OWL YA
- OWL 10-12
- OWL 7-9
- OWL 4-6
- OWL K-1

(Categories: Corporate, Large Program, Program, Transition, Midsize Pastoral, Small Pastoral, Fellowship; axis: 0.0%, 20.0%, 40.0%, 60.0%, 80.0%, 100.0%)
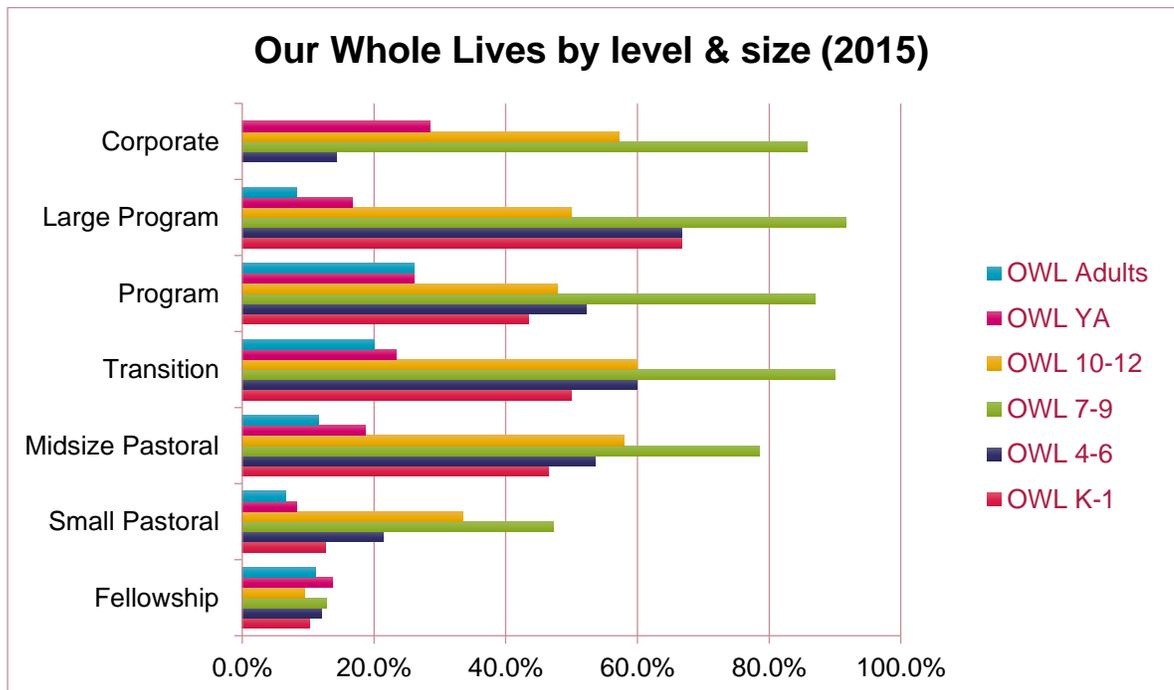
54% of congregations in the FACT survey report that they are involved in one or more international program.

Program	% of congregations involved
UU Service Committee (UUSC)	45.3%
UU Partner Church Council (UUPC)	12.7%
UU United Nations Office (UU-UNO)	8.4%
UU College of Social Justice (UUCSJ)	8.1%
International Council of Unitarian Universalists (ICUU)	3.1%
UUA International Office	2.5%
Holdeen India Program	1.0%
International Association of Religious Freedom (IARF)	0.6%

The goal of the UU College of Social Justice (CSJ) is to deepen and sustain the work of justice in their congregations and communities through experiential learning: programs that help people cross boundaries, gain insight, and imagine new ways to bring their faith together with their yearning to make a difference in the world.

In its four years of existence, CSJ has conducted 40 short-term journeys taking 469 participants to Haiti, Arizona, New Mexico, Guatemala, India, Tanzania/Burundi, Chicago, Alabama and Mississippi, India, Bellingham, Lumni Nation, and Nicaragua.

In addition, CSJ has trained 220 youth in Youth Justice Trainings, placed 36 summer interns, and initiated the following pilot programs:

- Seminary program to the Arizona/Mexico border
- Minsters' program to the Arizona/Mexico border
- Youth service-learning trips to Brooklyn (Hurricane Sandy Recovery)
- Lummi Nation immersion program (Solidarity with First Nations)
- Joint training with Food Chain Workers Alliance
- Grow Climate Justice training for young adults
- Nicaragua program in partnership with Equal Exchange
- Volunteers program with Raices in San Antonio

2. Participation and use of resources for inclusion

Finding Our Way Home, an annual retreat by and for religious professionals of color, sponsored and organized by the UUA Multicultural Ministries staff continues to grow in numbers and impact.

In 2015, Finding Our Way Home was held in Denver and drew 69 religious professionals of color.

Participation in this event, which has been held in the Washington Metro area, San Francisco Bay area, Atlanta, New Orleans, Chicago, Boston, and

Finding Our Way Home Religious Professionals of Color Retreat

Denver, and this year in Philadelphia, grows stronger each year, and as a result, our community of religious professionals of color strengthens with it.

**Finding Our Way Home
Attendance: 2007 - 2015**
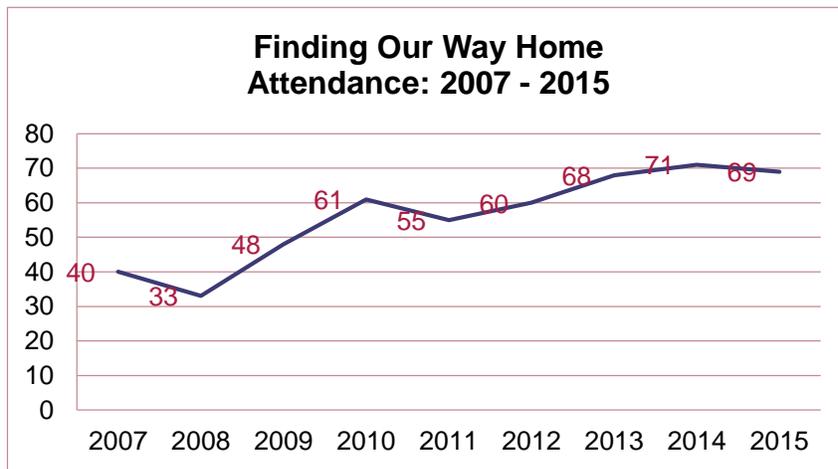
In 2015, youth and young adults (high schoolers through age 35) were supported to become leaders through a variety of programs offered by the UUA.

Program	Participation
Summer Seminary	18 youth representing 15 congregtions
Multicultural Leadership School	10 youth representing 10 congregations, 6 young adults representing 6 congregations
GA Youth Caucus	Staff: 10 youth representing 10 congregations, 5 adults representing 5 congregations; General attendance: 262 youth representing 87 congregations
Luminary Leaders	69 youth, 60 congregations
UU-UNO Spring Seminar	126 people, 56% were youth

Three of the most active programs offered by the UUA include support for Congregation Based Community Organizing (CBCO), Green Sanctuary, and the Welcoming Congregation Program.

Welcoming Congregation recognition is up 4% in this past year.

Program Engagement

CBCO	16%
Green Sanctuary	24%
Welcoming Congregation	77%
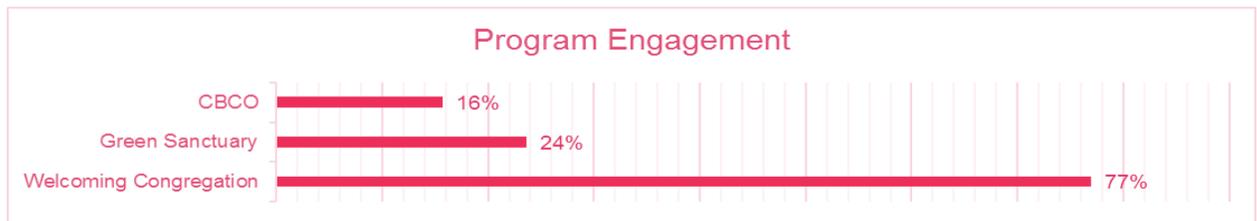
The 12 congregations that were recognized as welcoming Congregations for the first time in 2015 averaged 63 members, and five of those had fewer than 50 members.

As an incentive to renew their Welcoming Congregation statuses, in 2015, we offered congregations newly designed posters and the right to use the Welcoming Congregation logo on their website and materials. Ten congregations made commitments to renew their Welcoming Congregation statuses.

Additionally, we published a new LGBTQ pamphlet entitled, *A Spiritual Home for LGBTQ People*.
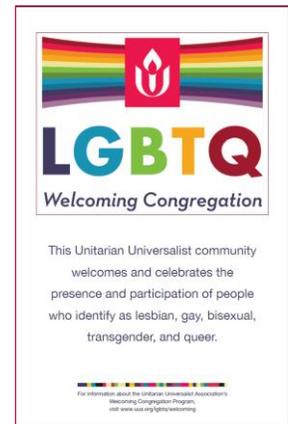
The following metrics demonstrate how the UUA supports congregations to be inclusive, multigenerational and multicultural through online, social media, and printed resources.

5141	The number of unique pageviews on Multigenerational pages on UUA.org - 72% from returning users (people like the resources and are coming back!).
143,780	The number of people reached by /sideoflove (Standing on the Side of Love) through social media in a 28-day period - a 59% increase over the same period last year.
1:15	The average number of minutes spent on Tapestry of Faith religious education curriculum pages. Up 38% from 2015.
24,312	The number of unique pageviews on Tapestry of Faith /multigenerational. Up 6.11% from last year.
11	Number of top 20 Beacon Press bestsellers related to multiculturalism, multigenerationalism, and justice ministry.
8	Number of top inSpirit (UUA bookstore) bestsellers, including books and non-book items, related to multiculturalism, multigenerationalism and justice ministry.

3. Modeling Inclusivity through our staffing

Overall, we've had a 4% increase in the percentage of employees of color in the past year. Our ratio of males to females in top management positions has remained constant.

	Executive		First Management		Professional		Sales Worker		Administrative Support		Service Worker		Total	
2014 Total	14		28		97		1		64		7		211	
2015 Total	12		36		86		2		71		6		213	
Race/Ethnicity														
Latino/Hispanic														
2014	1	7%	1	4%	1	1%	0	0%	1	2%	1	14%	5	2%
2015	1	8%	1	3%	1	1%	0	0%	1	1%	1	17%	5	2%
Change	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
White														
2014	12	86%	24	86%	87	90%	1	100%	52	81%	2	29%	178	84%
2015	10	83%	31	86%	71	83%	2	100%	55	77%	1	17%	170	80%
Change	-2	-14%	7	25%	-16	-16%	1	100%	3	5%	-1	-14%	-8	-4%
Black or African American														
2014	1	7%	2	7%	3	3%	0	0%	3	5%	4	57%	13	6%
2015	1	8%	3	8%	7	8%	0	0%	6	8%	4	67%	21	10%
Change	0	0%	1	4%	4	4%	0	0%	3	5%	0	0%	8	4%
Native Hawaiian or Pacific Islander														
2014	0	0%	0	0%	3	3%	0	0%	0	0%	0	0%	3	1%
2015	0	0%	0	0%	2	2%	0	0%	0	0%	0	0%	2	1%
Change	0	0%	0	0%	-1	-1%	0	0%	0	0%	0	0%	-1	0%
Asian														
2014	0	0%	0	0%	1	1%	0	0%	4	6%	0	0%	5	2%
2015	0	0%	0	0%	2	2%	0	0%	4	6%	0	0%	6	3%
Change	0	0%	0	0%	1	1%	0	0%	0	0%	0	0%	1	0%
American Indian or Alaskan Native														
2014	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
2015	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Change	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%
Two or more races														
2014	0	0%	1	4%	2	2%	0	0%	4	6%	0	0%	7	3%
2015	0	0%	1	3%	3	3%	0	0%	5	7%	0	0%	9	4%
Change	0	0%	0	0%	1	1%	0	0%	1	2%	0	0%	2	1%
Gender														
Male														
2014	8	57%	14	50%	28	29%	0	0%	16	25%	5	71%	71	34%
2015	7	58%	18	50%	26	30%	1	50%	12	17%	4	67%	68	32%
Change	-1	-7%	4	14%	-2	-2%	1	100%	-4	-6%	-1	-14%	-3	-1%
Female														
2014	6	43%	14	50%	69	71%	1	100%	48	75%	2	29%	140	66%
2015	5	42%	18	50%	60	70%	1	50%	59	83%	2	33%	145	68%
Change	-1	-7%	4	14%	-9	-9%	0	0%	11	17%	0	0%	5	2%

Note: the terminology used in the previous chart is according to EEO standard terminology and does not represent the UUA's understanding of how these categories are/ should be coded. In addition, 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.

Volunteer Committees and Task Forces

We have not yet determined how we can formally track for inclusion in our volunteer structures.

1.3 Compliance

We report partial compliance.

We meet compliance standards for all parts of this interpretation except for the ability to track inclusion in our volunteer structures.

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ENDS POLICY 1.4

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

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Interpretation

1. The UUA administration will participate in UU faith-based, inter-religious, and secular partnerships that counter systems of power, privilege and oppression at multiple levels of the organization.

2. The UUA administration will monitor the status and quality of its partnerships using multiple lenses and rubrics.

3. The UUA administration will create campaign structures which encourage congregations, communities and individuals to participate in partnerships that counter power, privilege and oppression, and monitor engagement.

4. Congregations and communities will engage in their own communities in interfaith partnerships that counter power, privilege and oppression through other community organizational structures, as evidenced by an increased number reporting such collaborations.

Organizational Impact and Rationale

The UUA administration recognizes that partnerships that counter systems of power, privilege and oppression have the following markers:

- Two or more individuals or organizations provide a significant investment of energy, ideas, resources, and/or time towards a common goal/vision/project/initiative that counters systems of power, privilege and oppression.

- The relationship between the parties is informed by their evolving identities, including the historic, current, and an envisioned future relationship between them.

- The collaboration has a clear and shared identity related to countering systems of power, privilege and oppression.

- The collaboration can be evaluated and changed by mutual agreement.

- The collaboration exists on an institutional level, is cognizant of staff/leadership transitions, and resilient beyond those changes.

The UUA administration understands that some collaborations - meaningful or otherwise - are not partnerships. These collaborations are not intrinsically related to Ends Policy 1.4. Additionally, the UUA further understands that valuable partnerships can exist even though they do not intentionally focus on countering systems of power, privilege and oppression. We believe that these partnerships can occasionally embrace initiatives that are related to Ends Policy 1.4 and for that reason will monitor them.

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 within and 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 international, national and regional levels through pursuit of our justice priorities and to help create a campaign infrastructure that allows local groups to participate in such partnerships.

Monitoring Process

UUA staff structures, including multi-organizational structures, that report partnerships related to Ends Policy 1.4 include:

- Multicultural Growth and Witness
- Standing on the Side of Love
- International Office
- Holdeen India Program
- United Nations Office
- Our Whole Lives Program
- UU College of Social Justice

Representatives from these staff structures will provide the following monitoring data on an annual basis beginning in 2017:

1. A list of the partnerships with which they interface that are related to Ends Policy 1.4, and include a brief description of how each partnership counters systems of power, privilege and oppression, or how it is growing in that direction, and a general evaluation of their impact.

2. A thorough narrative evaluation of at least one of these partnerships that describes effectiveness, learning, and related change.

3. An annual narrative summary of constituent engagement with at least one additional partnership.

4. A narrative summary, and data when available, of congregations and communities they interface with that are active in interfaith partnerships in their local communities.

1.4 Compliance

We report non-compliance.

We will be in compliance once metrics are developed.

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 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 various trainings offered by UUA staff
2. Resources provided will be deemed to deepen, enhance and improve congregations when they are referenced as a source of improvement in the Insight Congregational Self-Assessment Tool provided by UUA.
3. Beginning in the second half of 2016, the Insight Congregational 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

1. Publications and resources accessed

    The UUA's Facebook page has seen a 6% increase in likes and a 109% increase in 28-day reach between February 2015 and February 2016.

    Although UU World experienced a decrease in its 28-day reach in February 2015 compared to the same period last year, December 2015's total was almost four-times the previous year.

    Note: A 2013 UU World readership survey provides an in-depth look at readers' preferences as well as some of the options that have the potential of expanding the magazine's reach. See Meet our Readers for more information.

In addition, Standing on the Side of Love, with its new website design, has experienced a 68% increase in likes and a 59% increase in its 28-day reach.

Of the 85% of congregations that acted in support of a community social justice issue in the past year, 61% used Standing on the Side of Love resources to do so.

UUA.org pages	2.1.15 Likes		2.1.16 Likes	% Diff	2.1.15 28-Day Reach		2.1.16 28-Day Reach	% Diff
/theUUA	45,509	⬆	48,348	6%	110,251	⬆	230,251	109%
/UUWorld	24,508	⬆	26,800	9%	103,589	⬇	86,147	-17%
/SideofLove	45,279	⬆	76,257	68%	90,213	⬆	143,780	59%

UUA blogs have also sustained growth this year compared to last, despite the fact that blog readership across the Internet is said to be down. In the case of Blue Boat, the Youth and Young Adult Ministries blog, the growth is substantial at a 188% increase in visitors from 2015 to 2016.

Blogs	2015		2016	% Diff
Blue Boat	27,991	⬆	60,915	118%
Call and Response	17,635	⬆	18,000	2%
GrowingUU	27,140	⬆	27,328	1%
International	12,965	⬆	13,520	4%
Vital Leaders	11,038	⬆	14,020	27%
Total	96,769	⬆	133,783	38%

The UUA bookstore, now named inSpirit, received orders from at least 547 (53%) of congregations in 2015. This does not include orders placed by individuals for their congregations, so it is expected that this number is higher. In fact, over 80% of congregations report using inSpirit in the past year (see *Services, Resources, Or Programs* chart below).

2015 inSpirit Bookstore data

Sales	•1.2 million +
Items sold	•Books - 77,000 -- Non-book items - 16,500
Individual orders	•16,000
Method of sale	•Online - 60% -- Phone/Mail - 37% -- Instore - 3%
Website visits countries of origination	•170

## 2. Assessment of resources provided

The Insight Congregational Self-Assessment Tool has not been completed (see 1.1) and, as a result, congregations do not have a way to provide feedback on whether resources provided by the UUA are a source of improvement in the congregation.

We can report, however, on the percentage of congregations that have used UUA resources in the past year according to responses on the 2016 CQ.

Percentage of congregations that have used the following services, resources or programs

Services, Resources, Programs,
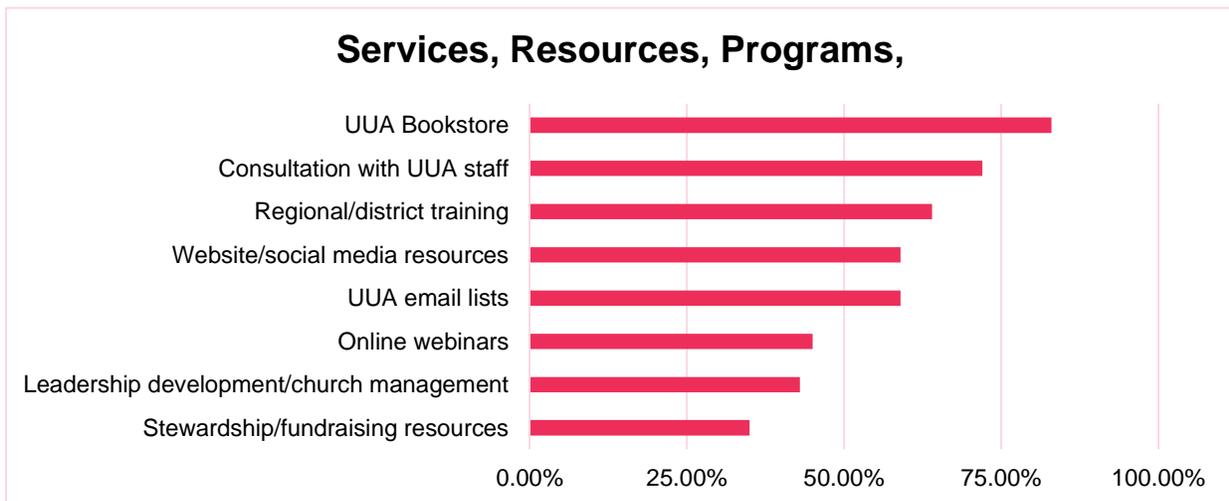
Percentage of congregations that have used the following faith development/religious education resources

Faith Development/Religious Education Resources
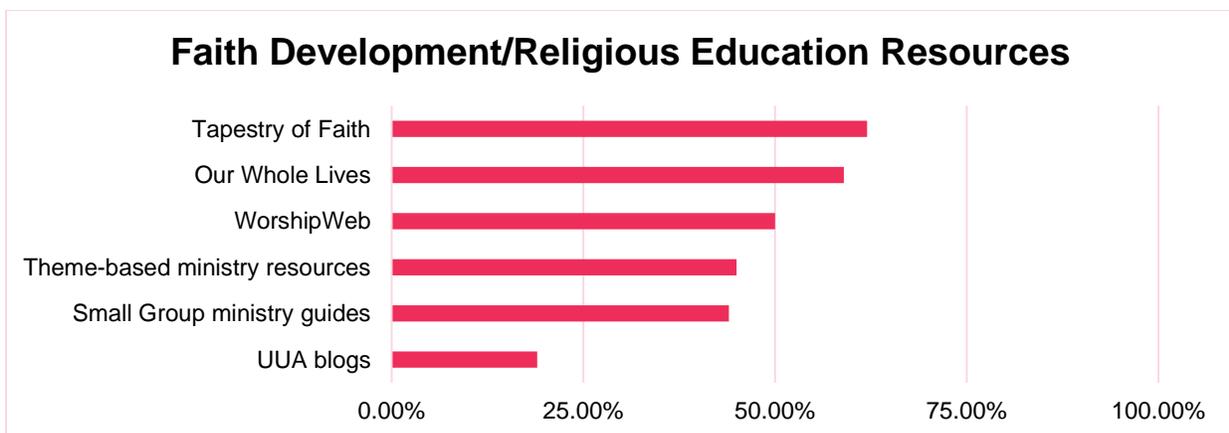
3. Use of Insight Congregational Self-Assessment Tool

See 1.1.

1.5 Compliance

We report partial compliance.

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

Adult membership in UU congregations was relatively flat from 2015 to 2016, showing a 1.1% decline. Although we have a seen a 5% decrease in membership in the past 10 years, we have experienced 4% growth in the past twenty years (1997-2016).

Enrollment in Religious Education (RE) declined 5.7% from 2015 to 2016 and has declined a total of 24% in the past ten years.

UUA Membership and RE Enrollment 10 Year Trends
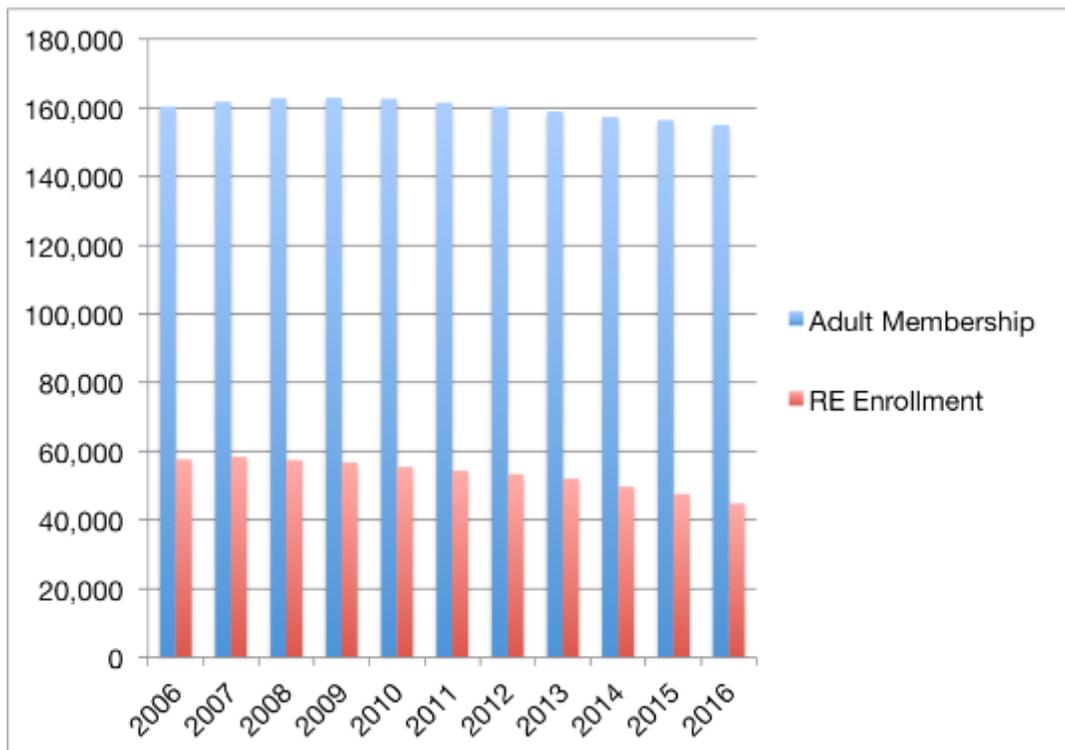
Total (Community) includes membership and Religious Education (RE) enrollment combined. Average Sunday attendance includes an estimate of the average number of all people in attendance on Sunday mornings.

UUA Total Community & Average Sunday Attendance 10 Year Trends
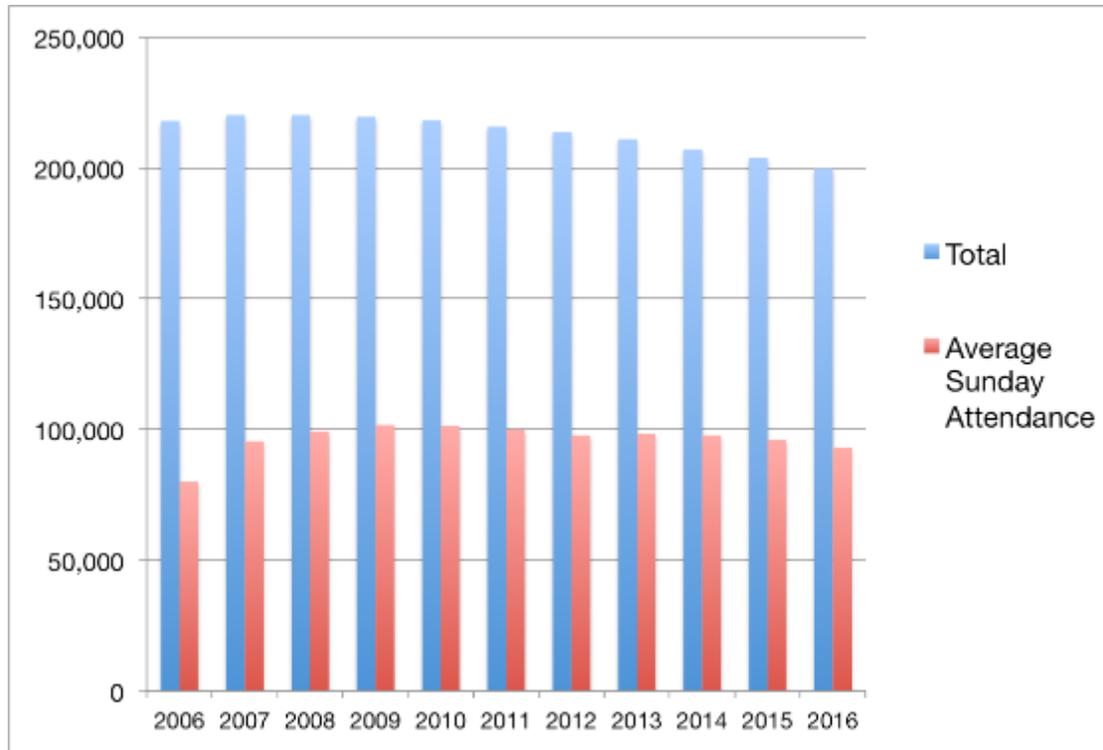
While we currently request numbers of "people served" by congregations, not just membership numbers, the collection methods and criteria for this data are not universal and therefore the numbers are unreliable.

For additional growth-related data, see the 2015 Certification Report.

1.6 Compliance

We report non-compliance.

This is due to downward trends in congregational membership and religious education enrollment.

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

In the last ten years, we've seen a slight decrease in the number of congregtions from 1,044 to 1,038 (0.48%). In 2015, we welcomed three new congregations, while eight congregations dissolved, merged, or are no longer in UU relationship.
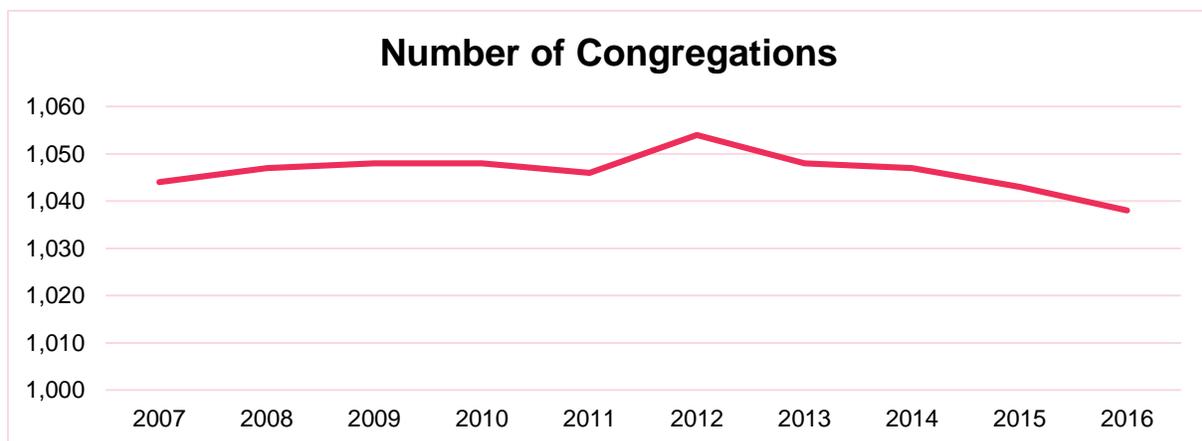
We continue to support 56 emerging ministries and eight covenanting communities.

1.7 Compliance

We report compliance.

While the number of congregations has declined slightly, the number of emerging ministries and covenanting communities more than offsets this decline.

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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.

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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 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 UU Ministers Association (UUMA) to provide a "Beyond the Call: Entrepreneurial Ministry" two-year training for ministers to learn growth and outreach methods from secular entrepreneurial leaders. 25 participants were chosen to participate in this training which began in February, 2015, and continues through 2016.

2. Congregational Life is currently running five "Innovative Learning Circles" for religious leaders, including 37 participants from 37 congregations.

3. Congregational Life has created a new "Multisite Ministries" website hub of resources and a network congregations participating in multisite experiments.

4. New minister orientation at the UUA

   Alicia Forde, Professional Development Director in the Ministry and Faith Development staff group, hosted 34 first-year ministers in March, 2016, at the UUA. Of note, only three of the ministers present were community ministers, with the rest serving parishes. Only one person identified as "bi-vocational." Alicia reports that they left full of gratitude for the UUA and for the opportunity to build relationships with one another. The methodology for the seminar is Parker Palmer's "Circle of Trust" designed to build lifelong collegial learning and support circles.

5. Emerging ministers support system

   Emerging ministries are supported, tracked and encouraged through a cross-staff team, with members from Congregational Life, Outreach and Youth and Young Adult Ministries. Emerging ministries currently include emerging congregations, multisite ministries, missional groups and communities, small meeting groups, and more. Regional coaches help local groups discern the right organizational role for their

ministry, and connect them with additional staff and resources based on their unique needs.

6. Faithify, a crowdfunding website introduced in June of 2014, where passionate people follow, share, and fund Unitarian Universalist ministries, has shown a strong increase in number of projects, in project success rates, and in total donations from its inception in June 2014 to the present. Although social media numbers have dropped this year, that would be expected since liking/following is a one-time activity.

	FAITHIFY	6/25/14-1/31/15 Partial Year	2/12015 - 1/312016	Year-to-Year Growth/Decline	Cummulative Total	Cummulative Growth
money	pledges ($)	$157,545	$285,209	81%	$442,754	181%
	pledges (#)	1,400	3,075	120%	4,475	220%
	average pledge	$113			$99	$99
	donations successful projects	$139,999	$269,552	93%	$409,551	193%
	pledges unsuccessful projects*	$12,679	$14,225	12%	$26,904	112%
projects	projects posted	40	77	93%	117	193%
	open projects	3	3	0%	6	100%
	closed projects meeting goal	24	59	146%	83	246%
	closed projects not meeting goal	13	14	8%	27	108%
	project success rate	65%	80%	23%	75%	15%
social media	Facebook likes	1,380	335	-76%	1,715	24%
	Twitter followers	608	343	-44%	951	56%

1.8 Compliance

We report compliance.

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ENDS POLICY 1.9

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

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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 relationships with other UU institutions (such as the theological schools, the UU Service Committee, UU Ministers Association), which result in an increased number of people participating in cross-institutional programs and in inspiring 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 re-sources and inspire other partnerships.

Monitoring data

The UUA develops and maintains active collaborative partnerships invested in the future of Unitarian Universalism, its principles and theologies. These include the following partnerships that began before 2/1/2015:

Initiative	Partners
UU College of Social Justice (UUCSJ)	UUA, UU Service Committee (UUSC)
Commit2Respond	UUA, UUSC, UU Ministry for Earth, Diverse and Revolutionary UU Multicultural Ministries (DRUUMM), Liberal Religious Educators Association (LREDA), UU Ministers Association (UUMA), UU Young Adults for Climate Justice, UUCSJ, Environmental Justice Collaboratory
Collaborative Campaign (Fundraising)	UUA, UUSC, Meadville-Lombard Theology School (MLTS), Starr King School for the Ministry (SKSM), Church of the Larger Fellowship (CLF)
Panel on Theological Education	UUA (grantees UUMA, MLTS, SKSM)
Beyond the Call	UUA, UUMA

These partnerships developed since 2/1/2015

Initiative	Partners
Wellbeing for Ministers	UUA, UUMA
In-Care Program (ministerial candidates)	UUA, UUMA, Senior Ministers of Large UU Congregations (SMOLUUC)
Religious Education Innovation Summit	UUA, LREDA, Fahs Collaborative/MLTS
LREDA 2016 Fall Conference	UUA, LREDA
Defying the Nazis Promotion and Outreach	UUA, UUSC, Beacon Press, Fahs Collaborative

1.9 Compliance

We report compliance.

APPENDIX

Size categories of congregations

In this report, we used the following size categories of congregations:

0-60	Family Congregations
61-160	Small Pastoral Congregations
161-300	Midsize Pastoral Congregations
301-400	Transition Congregations
401-60	Program Congregations
601-800	Large Program Congregations
800+	Corporate Congregations