

2017-18 CERTIFICATION



Annual Certification

Worksheet to help congregations
prepare for certification questions



Introduction

Each year, member congregations report annual membership and financial figures through the certification process, which determines UUA dues, delegates for General Assembly, and other key statistics.

As part of the UUA's work on institutional change and dismantling white supremacy we're inviting congregations to share the makeup of their own community with two new demographic questions. We know that awareness of our identities is part of living our values of justice and equity.

Remember that rather than requiring a password, now anyone from your congregation who has the secure link to your unique page can input information. Secure links to your unique account page will be sent via email to the congregational data administrator. You can fill out each section independently, and your account page will tell you when each section is complete.

Thank you for your help in making this year's certification a success. If you have feedback or suggestions about the updated process, please email data_services@uua.org. We look forward to hearing how we can improve this process.

For more information, visit uua.org/certify.

How to use this worksheet

Print a copy of this worksheet and use it to gather the information that is needed to certify your congregation's information. All information must be submitted online by the deadline: Thursday, February 1, 2018 at 5 p.m. PT.

To submit this information, go to uua.org/certify and log in to your congregation's Data Services account and submit your data online before the deadline.

The annual Certification for congregations includes five sections:

- 1. Congregation Directory Listing** – Verify your congregation's information is correct in the Find-a-Congregation Directory on UUA.org
- 2. Financial Statistics** – Provide your Total Operating Expenses and other financial statistics from your congregation's recently-ended fiscal year.
- 3. Membership and Attendance** – Update your membership, attendance, and demographic statistics to reflect current totals.
- 4. Congregation Poll** – Vote on the Congregational Study/Action Issues (CSAIs) that should be added to the 2018 General Assembly agenda for four years of study, reflection, and action.
- 5. Questionnaire** – Take a brief survey on what is important in the life of your congregation so the UUA can better support your work.

Use the following pages of this Worksheet to review questions and collect information from each of these sections before submitting them online.

Section 1: Congregation Directory Listing

Verify that the UUA has your congregation's current location and contact information on file. This information appears on the Find-a-Congregation page on UUA.org for visitors.

In this section of the annual inventory, you will be asked to review basic contact information about your congregation and update any of it if necessary. These items include the congregation's name, mailing address, meeting address, business phone, business email, website, and accessibility information.

Section 2: Financials

Your congregation will be asked to submit financial statistics from your congregation's **most recently-ended fiscal year**. (For example, if your congregation runs a July-June fiscal year, you should be reporting all financial information as related to the time period July 1, 2016-June 30, 2017). These figures are used to calculate GIFT program contributions for congregations in the Southern region (as well as Annual Program Fund contributions in certain cases). They also provide the UUA, regions, and districts a gauge on the financial health of congregations.

Total Expenses*	
Denominational Contributions*	
Capital Expenses*	
Total Pledge Income	
Total Individual or Family Pledging Units	
Rent or Own Primary Facility	
Endowment and Reserves	
Long-Term Debt	

*You will enter these three figures into the APF Calculator online (part of the Certification form). The Calculator will subtract the Denominational Contributions and Capital Expenses from your **Total Expenses** in order to calculate the *Total Operating Expenses* you report to the UUA. (Total Operating Expenses are the cost of running your congregation for one year, such as salaries, rent, mortgage payments, utilities and supplies – less your congregation's contributions to the District or Region and the UUA's Annual Program Fund or GIFT Program).

1. *Total Expenses*: The cost of running your congregation for one year, such as salaries, rent, mortgage payments, utilities, and supplies.
2. *Denominational Contributions*: Total amount contributed to the UUA via the Annual Program Fund and to the District or Region, OR GIFT Program contributions.
3. *Capital Expenses*: This varies, but could include mortgage principal, or other capital expenditures not related to regular operating expenses.
4. *Total Pledge Income*: The total amount of formal pledges that were given by members and friends.
5. *Total Number of Individual and Family Units Making Formal Pledges*: Many families are considered a single pledge unit. However, if John Smith pledges \$1,000, and his spouse pledges \$1,000, and the pledges are recorded separately, then they should be counted as two pledging units.
6. Does your congregation own or rent its primary facility?
7. What is the dollar value of your congregation's *endowment and reserves* at the close of its last fiscal year?
 - *Endowment* – Funds held in long-term investment accounts including restricted, unrestricted, and board-restricted funds. The funds may be in accounts directly held by the congregation or in separate entities such as foundations or trusts established primarily for the benefit of the congregation.
 - *Reserves* – Funds held for emergencies, future building projects, and/or capital improvements but not for regular operations.
8. How much did your congregation owe in *long-term debt* at the close of its last fiscal year? (Including mortgages, bank debt with multi-year payment schedules, and bonds or loans from congregants and friends. This does not include credit card debt or other loans due in one year or less).

Section 3: Membership

Your congregation is asked to submit its current membership count and attendance statistics. These figures are used to calculate the Annual Program Fund contributions (not including Southern Region congregations participating in the GIFT program). They also provide the UUA, regions, and districts a gauge on Unitarian Universalist growth and participation. See below for how to answer these membership questions.

Number of Members	
Number of Total Members (for Multi-Denominational/ Federated Congregations Only)	
Average Weekly Attendance	
Religious Education Enrollment	
Non-Member Friends	

1. Current Members: This should be your congregation's **current** number of members. (*Note: If your congregation is a multi-denominational/federated congregation, do not enter your total members; instead, enter only the number of members who identify as Unitarian Universalist*).
2. Multi-Denominational/Federated Members: This question is for multi-denominational/federated congregations only (*UUA congregations who do not have multiple denominational affiliations should skip this question*). Multi-denominational/federated congregations should report their total membership in this field.
3. How many people (ranging in age from nursery through high school) are currently enrolled in Religious Education? This total should equal the number of children and high school youth who are registered within the congregation's religious education program. For safety reasons, the UUA suggests all children be officially registered. If you need help designing a registration system that works for you, please contact your District or Regional staff. If there are children or high school youth who attend Religious Education programs but are not yet officially registered, you may include them in your total count. Please consider registering all participants so that reported totals in the future will include only these children and high school youth who are officially registered.

4. What is the current Average Weekly Attendance at your congregation?
- Gather attendance figures for all 52 Sundays, as follows. If you hold services for only part of the year, gather attendance figures for the Sundays you meet. Congregations with alternatives to Sunday morning worship should include unduplicated attendance at these other services as well.
 - For each Sunday, count the number of people of any age who attended or who served as a leader in one of the following: worship/other services; church school for children, youth, or adults; and nursery care during worship. Count each person only once for a given weekend. Total all 52 weeks and divide by 52 (or the number of weeks you met) to compute an average attendance for that year.
 - If you have special holiday services that would tend to skew attendance figures when they fall on Sunday or Saturday evening (e.g. Christmas Eve service), eliminate that Sunday and count twice the attendees for the following Sunday. Do not adjust for Easter Sunday or any other holiday that always falls on a Sunday – continue to count those within with your regular attendance figures.
 - If you have less than six months of data, please wait until next year to submit an average attendance figure. This year enter 0 (zero).
5. How many Non-member Friends do you estimate are currently involved in or contribute to your congregation but are not members?
- *Do include:* non-members who financially contribute; parents of students enrolled in religious education; former members who have moved away but still retain a connection such as continuing to receive your newsletter; participants in outreach programs such as a college campus group or military ministry group that your congregation sponsors.
 - *Do not include:* people served by a community social justice program of your congregation that have no other connection to the congregation; attendees at events for which another organization has rented your building; families whose children go to a pre-school program in your building and have no other connection to the congregation.
6. Of your congregation's members, what percentage do you estimate identify as people of color?
- Those who identify as people of color may include African Descent, Asian, Caribbean, Latinx and Hispanic, Middle Eastern/Arab,

Native/American Indian, Pacific Islander, and Multiracial.

- Use the dropdown menu to select the percentage range that best describes your congregation's members.
- Congregations who do not want to provide this information may opt out by checking the "We do not wish to provide this".

7. Of your congregation's members, what percentage do you estimate identify as lesbian, gay, bisexual, transgender, or queer (LGBTQ)?

- Use the dropdown menu to select the percentage range that best describes your congregation's members.
- Congregations who do not want to provide this information may opt out by checking the "We do not wish to provide this".

Section 4: Congregation Poll

Vote on whether your congregation thinks either of the two following Congregational Study/Action Issues (CSAIs) should be added to the 2018 General Assembly agenda for four years of study, reflection, and action. 25% of all certified congregations must participate and a majority of those congregations participating must vote in favor of the CSAIs to be included in the agenda.

CSAI: Undoing Intersectional White Supremacy

Racism is fundamental to U.S. social systems. White supremacy culture operates economically, institutionally, politically, and culturally, shaping everyone's chances to live healthy, fulfilling lives. It is also the nation's most toxic export, shaping policies and practices that do profound harm to the Earth and all living things.

CSAI: Dismantling Intersectional Oppression

Systemic injustices intersect across environment, race, gender and all other forms of oppression. Identifying the underlying mechanisms which enable systemic and intersecting injustices enables us to mitigate their harm. Intersectional justice calls us to work together across oppressions and become a movement of movements.

Your congregation may vote Yes, No, or Abstain, for these two CSAIs.

- **Yes** means your congregation wants the CSAI to be added to the 2018 General Assembly Agenda.
- **No** means your congregation does not want the CSAI to be added to the 2018 General Assembly Agenda.
- **Abstain** means your congregation is participating only to contribute to the necessary 25% quorum.
- Congregations that do not wish to participate in the poll at all can opt out.

To view the complete text of the CSAIs, go online to uua.org/statements/current.

Section 5: Questionnaire

A new addition to this year's certification, this brief survey of 14 questions will help the UUA gain a sense of what is important in the life of your congregation and how we can help support your work. It should take no more than ten minutes to complete. To review each of the questions, see the attached questionnaire copy or go to the Questionnaire Worksheet on your account home page. You may wish to share these questions with different professional and volunteer leaders in your congregation before responding. Please submit responses online through the certification portal.

Please note: this questionnaire not address UU World Magazine, General Assembly or UUA Insurance Programs for congregational staff, which use different forms of surveys and assessment.

Congregational Questionnaire

COPY ONLY – SUBMIT ANSWERS ONLINE

1. In the past year, how helpful has the UUA (including your regional staff) been to your congregation in advancing its mission and addressing key challenges?

Likert scale 1-5, Not at all helpful, somewhat unhelpful, neither helpful nor unhelpful, somewhat helpful, very helpful

Additional comments (optional):

2. Which of the following are currently addressed by Safe Congregation policies in your congregation?
 - Children or classroom safety
 - Youth safety
 - Limited access agreements
 - Disruptive behavior / right relations processes
 - Building safety and/or emergency preparedness
 - Employee conduct and/or sexual harassment
 - None of the above
3. Have you collaborated with another UU congregation in your area or cluster on any of the following over the past year?
 - Informal conversation or support
 - Shared project or program
 - Community event
 - Shared staffing arrangement
 - None of the above
4. Has your congregation publicly acted in support of any of the following social justice issues in the past year?
 - Accessibility / Disability
 - Climate justice / environmental sustainability
 - Economic justice/classism
 - Immigration
 - Housing / homelessness

- LGBTQ equity
 - Racial justice/ Black Lives Matter / countering white supremacy
 - Reproductive justice
 - Voting rights
 - Other (please specify)
 - None of the above
5. Has your congregation participated in UU international programs this year?
Did you collaborate with any of these offices?
- UUA International Office
 - UU United Nations Office
 - UU Holdeen India Program
 - UU College of Social Justice -- learning journeys or volunteer placements
 - UU Service Committee
 - UU Partner Church Council
 - International Council of UUs
 - International Association for Religious Freedom
 - Other (please specify)
 - None of the above
6. Has your congregation engaged in any of the following multicultural or anti-racism learning programs in the past year?
- Mosaic Makers
 - Welcoming Congregation refresher
 - Building the World We Dream About curriculum
 - Beyond Categorical Thinking
 - Intercultural competence and sensitivity
 - Other (please specify)
 - None of the above
7. Which of the following has your congregation used to help lead faith development or religious education this year?
- Common Read book for 2017-18
 - Tapestry of Faith curricula
 - Our Whole Lives curricula
 - Our Whole Lives facilitator trainings
 - Theme-based ministry resources
 - Small group ministry guides

- Renaissance Module faith development training
 - None of the above
8. Which of the following approaches have you used for your worship services this year?
- Worship services on days of the week beyond Sunday
 - Utilize materials from WorshipWeb -- online collection
 - Monthly themes
 - Experimenting with different styles of music
 - Multimedia - slides, images, presentations, videos, etc.
 - All-ages or multigenerational services
 - Use worship elements (e.g. sermon) recorded or live stream from another congregation
 - None of the above
9. Have you used Standing on the Side of Love resources or engaged with the campaign? (Y/N)
10. What online congregational leadership and management resources or materials from the UUA has your congregation used in the past year, accessed through UUA.org?
- inSpirit Books and Gifts / UUA Bookstore
 - Human resources or church management materials and guides
 - Congregational compensation consultants
 - Stewardship or fundraising resources
 - Stewardship For Us consultants
 - Leadership development or governance resources
 - Communications, website, or social media resources
 - Outreach, growth and membership guides or materials
 - Congregational social justice organizing resources
 - UUA blogs and social media
 - UUA email lists (e.g. UU Leaders, REACH)
 - Faithify crowd-funding platform
 - Other (please specify)
 - None of the above
11. What services, resources or programs from your UUA region has your congregation used or participated in during the past year?

- Regional or district newsletter
- Webinars or workshops
- Online courses through the UU Leadership Institute
- Regional or district in-person leadership school or training
- Consultation with a regional UUA staff member
- Meeting, startup or retreat in your congregation facilitated by regional staff
- Regional or district youth events and conferences
- Regional or District Assembly
- Other (please specify)
- None of the above

12. What is the most challenging thing for your congregation right now?

13. What is most exciting thing going on in your congregation right now?

14. What is one thing you would like more help with from the UUA?