

DISCUSSION OF METRICS

For discussion at UUA Board Meeting on 6-24-2014

Introduction

Key members of the Administration (Peter Morales, Harlan Limpert and Terasa Cooley) have been working with an advisory group of the board (Jim Key, Donna Harrison and Rob Eller-Isaacs) and an outside Policy Governance consultant (Eric Craymer) to develop appropriate metrics to illustrate progress towards Ends.

The information below attempts to provide an honest and transparent picture of management thinking on metrics as well as where that might take us. Our interest is in providing the Board with the information it needs to fulfill its owner obligation to assure performance, as well as the incidental information it needs to know that the Association is healthy and on track.

As you will read, at this stage we are committing to a path of measurement for the Ends as currently interpreted. What we also wish to make apparent is that, in fairness to the Board, while these are our best thoughts today they may not always be, especially given that this is all new ground. Our intention is to not be wedded to a particular measure just because it has been accepted but to put our best forward and, if we find an even better measure to adopt it.

There are several sections to this document. The first section outlines some of the President's general thinking about metrics and measurement. It also shares the intention to evolve those metrics and measurement over time. The second outlines the impact of this philosophical view of measurement on our Ends interpretation metrics. The third shares some insight into the current state of a congregational and community survey and reflection tool that we hope will both provide us with data to show Ends achievement as well as to provide a self assessment reflection that will allow our

congregations and communities to advance their own progress. And finally, the Ends interpretations including the metrics for measuring them.

It is our expectation to develop baseline data for the metrics by October, 2014, and then to provide actual progress measures in our Ends Monitoring in April. It is possible that as we move forward we will find more or better measurement systems for showing the real impact of our Ends, in which event we will advance our system.

This document summarizes our current work. At the end of this document, next steps are outlined.

Metrics — background considerations

Measurements are both necessary and insidious. They are necessary because we need honest, disciplined feedback on the effectiveness of our activity. They are insidious because metrics often have unintended consequences. We need look no further than the effects of standardized testing on education. Many congregational surveys are poorly constructed and contain responses from an unrepresentative sample, yet are taken as valid indicators of attitudes.

Measuring progress towards the Ends of the Association presents additional challenges because progress towards our Ends is very difficult to measure with validity and reliability. This does not mean we should not measure effectiveness. It means we have to be thoughtful.

Below is a list of principles I believe should guide our ongoing of monitoring:

Variety — hard and soft data

Multiple measures are typically better than one. Some measures, like total adult membership, seem pretty straightforward. However, even these can be misleading without added analysis by region, church size, congregation age, etc. On other topics, such as *using resources to deepen spiritual exploration (policy 1.5)*, counting “hits” and

publications is a one measure. However, these need to be supplemented by information on which materials are the most usefully and *why* they are useful. Continuing this example, the best insights about resources may well be gained by non-quantitative measures such as carefully selected focus groups.

In a similar vein, simply measuring *the number of partnerships to counter systems of power, privilege and oppression (1.4)* can be misleading. A few powerful and enduring partnerships (NDLON, NAACP, Interfaith Youth Core) are far preferable to a large number of weak and brief relationships. Measuring the quality of relationships does not lend itself to quantification.

Useful

Ideally the information we gather is useful both to the UUA (to help improve our programs and guide our resource allocation) and to congregations. For example, data on which resources people find the most impactful is useful to everyone. Metrics should shape decisions. If they do not, they are not the right metrics.

Simple and easy

Metrics are never free. One of the difficulties we have had with the monitoring process in previous years is that the effort needed to provide some data was not justified by its usefulness. Since there is always an opportunity cost, we should strive for ease and simplicity.

Analysis and interpretation

Data usually do not speak for themselves. For example, our national membership numbers are not very useful. Membership numbers analyzed over time, in terms of congregation size categories, regionally, in terms of the age of congregations, etc., are far more useful.

Similarly, the raw data obtained during the “Gathered Here” program only became useful after a great deal of effort in pulling out themes and patterns.

Results versus activity

We all agree on the importance of measuring results rather than activities. Alas, it isn't that simple. To take an extreme example, our efforts to recruit excellent prospects for ministry will not bear fruit for a number of years. We do it because we believe it will make a difference. We can measure the activity and short term results like number of participants and their evaluations. Sometimes we just have to measure activity first and results much later.

Summary

This is all common sense stuff. Alas, common sense can sometimes be lost. In brief, we want to know that what we do makes a difference. We are committed to measuring what can be measured with reasonable effort and what will guide our most important decisions.

Impact on the Measurement Approach

The actual choice and definition of measurements for the policies will follow the principles discussed in "Metrics - background considerations" above. Each Ends policy will be evidenced by a set of measures, quantitative and/or qualitative. Some sets may include one or more measurements in common with those in the sets for other policies.

These measurements will be considered our best hypothesis as to how best to evidence to the Board the change promised in the interpretation and will also indicate to Management whether or not our strategies and actions are actually working.

We expect these measures to evolve. Some may turn out to be inappropriate methods for the change described in the interpretation. Some may turn out to be appropriate but no longer the best way of measuring it. Some policies may require additional measures in addition to those initially proposed. Basically, as we learn more and as the data informs us, we will continue to refine and advance the measurements to ensure the best possible evidence of achievement and the best possible metrics for strategic thinking and action.

When a change is substantial or significant, we will report that change to the Board as incidental information based on Policy 2.13.2, "Communication and Support to the Board".

We recognize that accountability requires evidence and will provide it but we also want to ensure that the methods of measurement yield the best possible information both to the Board and for Management. Our great hope is that we can have the same generative conversations about measuring outcomes as we have had interpreting them.

Specific Measurement(s) for Each Ends Policy

See document file named "Table Summarizing Interpretations and Measurement" accompanying this document.

ENDS INTERPRETATION

Revised April 11, 2014

PART 1: MONITORING INFORMATION

Prologue to Interpretation:

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

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

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

ENDS MONITORING

Global End Policy

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

Interpretation:

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

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

We believe that “transforming power” is that which inspires people to understand their capacity for change and strengthens them in taking responsibility for that change. We also understand it to be that which, conversely, helps them recognize the ways in which they may not be in control or self-sufficient and therefore in need of others in community and to be open to moments of grace. This will be evidenced by an increased number of UUs who attest to this experience through a self-assessment tool developed by the UUA and in focus group conversations re-corded as anecdotal evidence.

We interpret “institutional sustainability” to apply to the ongoing ability of the UUA to serve as an instrument, through the actions of our congregations and communities, of achieving the called for transformation which will be accomplished through the measurement of impact and the judicious use of resources. This will be evidenced when at least 80% of major strategic programs designed to accomplish our Ends interpretation are being assessed with a formal process for 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 above all focus on maintaining our present institutional forms, but that it will sustain its ability to make the community/communities healthier as measured by the lower level policies.

Thinking Behind Why THIS Interpretation of the Global End

This section describes how and why this specific Ends interpretation was chosen. This is not offered as a part of the formal monitoring report but is shared to help you understand the thinking behind our choices.

Assumptions and Reasoning

We believe the world needs the values of Unitarian Universalism. More than ever, there is a desire to live lives of meaning, purpose and justice. The values expressed by emerging generations are in alignment with the values of Unitarian Universalism.

An external assessment of changes in our broader culture and religious landscape demands that we recognize that we have to expand our efforts to actively engage people outside of traditional congregational constructs, and to help congregations focus their efforts externally as well as internally. In particular, the growth of the number of people, especially younger generations, who have no religious affiliation and no church-going practices requires that we provide a clear and differentiating signal of

the difference we believe our Unitarian Universalist values can provide to individual lives and our collective culture. Simply maintaining and resourcing our existing institutions is not motivating to these emerging communities, nor is maintenance the end goal.

An internal assessment of our Association reveals that we already include individuals and communities with great capacity to fulfill our Ends. And we recognize that our current population is not increasing in numbers, is aging, mostly monocultural, class-bound, and increasingly less willing to provide financial support for institutional maintenance. In order to reverse this trend, we realize that we have to engage people in an ongoing enterprise of spiritual reflection and action that speaks to their everyday lives in an increasingly complex world. We believe our institution(s) will be sustainable when they fulfill these values.

We believe that the Association is obligated not just to serve its existing members, but to partner with our members and those in the broader community transform the world by application of our values.

End Policy 1.1

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

Interpretation:

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

“Covenanted” We understand covenant to mean that congregations and communities make explicit and ongoing promises of faithful relationship to one another. We also understand this means individuals, communities and congregations understand themselves as a part of a larger whole (both

institutionally and spiritually) in which they both contribute and receive. We also understand covenant to include our promises to others outside of our faith.

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

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

“Mission-driven” We understand “mission-driven” as related to our earlier statement that congregations and communities are the means of transformation, and therefore their understanding of transforming purpose must be clear, concise and explicable to anyone joining or observing from outside. Their mission must not just be expressed but their activities must demonstrate alignment with their expression.

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

Organizational Impact and Rationale:

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

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

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

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

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

Ends Policy 1.2

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

Interpretation:

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

Organizational Impact and Rationale:

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

Ends Policy 1.3

Congregations and communities are intentionally inclusive, multigenerational and multicultural.

Interpretation:

1. UUA staff, volunteer structures, and policies will model inclusivity of age, identity and culture as evidenced by increased diversity in these areas.
2. Congregations and communities will have access to resources (see Policy 1.5 interpretation) that deepen their ability to grow in their inclusivity as evidenced by increased usage of relevant resources as well as participation in activities and partnerships that create border-crossing experiences.
3. Congregations and communities will engage in intentional self-reflection and cultural changes as evidenced by increased participation in learning arenas in these areas.

Organizational Impact and Rationale:

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

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

Ends Policy 1.4

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

Interpretation:

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

Organizational Impact and Rationale:

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

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

Ends Policy 1.5

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

Interpretation

1. Resources which are designed to help congregations and communities, regardless of economic circumstances, achieve the interpretation of 1.1 (including physical and virtual publications, trainings, and events to connect them with others) will be used increasingly each year as measured by:
 - a. Number of publications accessed
 - b. Number of persons attending training
 - c. Anecdotal evidence based on the number of joint efforts and their estimated attendance.
2. Resources provided will be deemed to deepen, enhance and improve congregations when they are referenced as a source of improvement in a self assessment tool provided by UUA.
3. The self assessment tool will be completed by an increasing number of congregations and communities each year.

Organizational Impact and Rationale:

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

We have come to believe that the most sustainable learning does not always happen through the transmission of information but also through the development of relationships that strengthen capacity and resiliency. Therefore creating encouragement and opportunities for congregations and communities to gather with one another strengthens this End.

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

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.

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 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.

Ends Policy 1.8

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

Interpretation:

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

Organizational Impact and Rationale:

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

Ends Policy 1.9

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

Interpretation:

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

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

Organizational Impact and Rationale:

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

Congregational Self-Assessment Tool

PART A: Primary Monitoring Process: Congregational Self-Assessment Tool - Assumptions and Stages

Assumptions

For the purposes of monitoring congregations' ability to move toward fulfillment of all of the upper level Ends, we wish to engage congregations in a process that will ultimately be helpful to the congregations themselves in their own evaluative and reflective processes. Therefore, we are developing a tool that outlines core areas of congregational health and asks congregational leaders to assess where they might be on a developmental scale in each area, including an indication of where they have been in the past, see themselves in the present, and what they aspire to in the future.

This tool does not map clearly to the UUA Ends. The reason for this is that the Ends serve our larger institutional purposes, and are not confined only to congregational practices. If congregations are engaged in a process more clearly recognizable to them as tools for their own purposes, they will engage more readily in it. We believe that having access to congregation's realizations will help us distill the relevant information necessary to monitor our progress toward Ends fulfillment.

In addition to the self-assessment questions, we will ask congregations then to indicate the UUA resources that they have engaged with. By then placing this information next to their assessment of where they stand, we hope to find correlative indications of the relationship between use of the resources and initiatives of the UUA and the congregations' level of capacity.

We also wish congregations to understand their capacities in different areas in a holistic way. For example, a congregation's level of health in working through conflict is

not unrelated to its ability to achieve multigenerational and multicultural diversity. Our tool will help congregations see these core areas in relationship with one another.

The self-assessment process will also help staff be able to gain access to information about which congregation is utilizing which resources or which have specific challenges in relationship to a specific staff area.

Stages

Initially this tool will be introduced through traditional online survey technologies (such as Survey Monkey). Ultimately we hope to develop an online interactive tool that will allow congregations to see their assessment alongside other congregations' assessments, and that will allow a much more dynamic and relational use of this information.

We envision a system that will allow a congregation to create a profile (that can then be utilized for other purposes like ministerial searches, etc.) and then be able to continue to update and change their perceptions over time. Such a tool will also allow us to suggest resources for further exploration in particular areas, as well as to track which resources are being used and in what context.

Obviously this will be a large and expensive task to build out such a tool, but we are hopeful that we can attract some large grant funding from religious grant-makers like Lilly as it could be useful for other denominations and data gathering purposes.

Timeline

We will be rolling out the survey version of this tool this summer and be able to then utilize and analyze its information for purposes of giving the Board monitoring reports in each of the high level Ends at its October meeting.

Additional monitoring processes

The Administration also plans to utilize other assessment processes we are currently engaged in that are relevant to specific programmatic areas that can help fill out the self-assessment information.

Some examples:

- The “Leap of Faith” program, now in its third year, has included a rigorous assessment process designed by our Brandeis consultants. This information can have particular relevance to policies 1.1, 1.2, 1.5, 1.6 and 1.9.
- The “Multicultural Ministries Sharing Project” is an effort to gather information from people of historically marginalized identities / experiences about their experience of Unitarian Universalism. We have received hundreds of responses from individuals and are now in the process not only of analyzing this information, but also creating focus groups allowing for deeper discussion of the issues raised. This information can have particular relevance to policies 1.1, 1.3, 1.4 and 1.6.

Let us emphasize that these will not be “program reports” but rather opportunities to utilize ongoing program assessments for purposes of Ends monitoring.

PART B:

The *Congregational Self-Assessment Tool v2*, on the following pages, is the specific tool the administration is proposing to be used as both a measurement tool and a developmental resource for congregational health.



CONGREGATIONAL SELF-ASSESSMENT TOOL

Measuring Health & Vitality of Unitarian Universalist Congregations and Communities



Healthy and vital UU congregations and communities are those that are covenanted, accountable, mission-driven, intentionally inclusive, and spiritually-centered.

This congregation is driven by **MISSION** and **VISION**

- The congregation has a strong purpose/reason for being and knows where it is going
- Decision-making and strategy in the congregation are guided by mission and vision
- The congregation is actively engaged with the wider surrounding community

VERY UNTRUE

SOMEWHAT UNTRUE

NEUTRAL

TRUE

VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with mission and vision included:

In the future this congregation aspires to the following with mission and vision (including potential strategies):

Roles and responsibilities in this congregation are clear

- There is an organizational structure and operational systems
- Board, Committees, Ministers, and Staff understand their own and each other's roles
- Leaders work together to accomplish the mission

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current state including challenges and opportunities:

In the past challenges and opportunities with roles and responsibilities included:

In the future this congregation aspires to the following regarding roles and responsibilities (including potential strategies):

The history of this congregation is known

- People in the congregation know the events and people that shaped the congregation's history
- People in the congregation understand how the congregation's history helps or hinders its future

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current state including challenges and opportunities:

In the past challenges and opportunities with knowledge of history included:

In the future this congregation aspires to the following knowledge of history (including potential strategies):

This congregation has a healthy approach to conflict

- Conflict is dealt with, even welcomed as an opportunity (rather than avoided)
- There are systems and processes in place to address conflict within the congregation

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with conflict included:

In the future this congregation aspires to the following with its approach to conflict (including potential strategies):

This congregation practices “right relations”

- There is a clear understanding of what can be and has been promised to each other
- Behavioral boundaries are well understood
- People in the congregation use covenanting as an ongoing process that requires continued attention and intention

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with right relations included:

In the future this congregation aspires to the following with right relations (including potential strategies):

This congregation knows itself to be part of a larger Unitarian Universalist community

- The congregation asks for help from the larger Association and other congregations
- The congregation is tied to the larger Unitarian Universalist world through partnerships and associational participation

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with associational relations included:

In the future this congregation aspires to the following with associational relations (including potential strategies):

This congregation is intentionally inclusive

- Multigenerational and multicultural principles and practices are reflected in all aspects of congregational life
- Congregational practices have been examined in light of anti-oppression frameworks and altered to allow for greater inclusivity

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with inclusivity included:

In the future this congregation aspires to the following with inclusivity (including potential strategies):

This congregation grows spiritual leaders transformed by their faith

- Meaningful faith formation opportunities for all ages are central to the life of the congregation
- People in the congregation operate from a sense of shared ministry and understand themselves as spiritual leaders

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with spiritual leadership and shared ministry included:

In the future this congregation aspires to the following with spiritual leadership and shared ministry (including potential strategies):

This congregation is growing

- Membership numbers have increased in both adult and RE enrollment
- More people are attracted to the congregation, its worship, and its programs than are leaving

VERY UNTRUE SOMEWHAT UNTRUE NEUTRAL TRUE VERY TRUE

Reflections on current reality including challenges and opportunities:

In the past challenges and opportunities with growth included:

In the future this congregation aspires to the following with growth (including potential strategies):

The following individuals participated in the completion of this assessment tool:

The following Board members and/or other elected leaders reviewed and endorsed this assessment:

Date of Completion:



Dashboard

A dashboard is being created consisting of charts showing a ten-year history for the acts below. The dashboard is not meant to be part of the metrics, but rather serves as an important indicator of corporate health. Certain charts will be used in incidental reports or potentially as support in particular monitoring reports. This information should help the Board gain more context of the formal Ends measurements. Those elements which are shared will be placed in context to those Ends measurements or in context to things which are necessary to have in place in order to achieve the Ends.

- the number of congregations
- adult membership (UUA compared with UCC, Southern Baptists, Methodists and Reform Jews)
- religious education registration
- Sunday attendance
- total financial expenditures of our congregations
- number of “emerging” groups
- sources of UUA income as a percent of total budget

Next Steps

A discussion of this proposed approach will take place with the advisory group on June 6, 2014. Changes will be made based on suggestions and insights gleaned from that conversation.

On Tuesday, June 24, the whole UUA board will discuss the revised proposal with the administration for further input and fine-tuning. Part of the task will be to determine whether the proposed measurements provide the kind of information needed to satisfy that progress towards Ends is being made and that they provides helpful information to the administration in making budget decisions and changes to programs and activities.

By the October 2014 UUA board meeting, baseline data will have been obtained and further discussions will take place about progress towards ends. It is expected that this will lead to an actual measure of progress in the April Ends Monitoring Report.