



# Proposed Revised & Prioritized Ends

January 2018



## **Global End 1.0**

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

### **Summary Interpretation**

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

Critical to developing congregations that are alive with this transforming power that seeks change internally and externally are professional and lay leaders equipped for mission-driven, multicultural ministry that embraces change, navigates conflict in positive ways, tends to the spiritual growth of people at all ages of life, and practices a culture of risk, mistake-making, forgiveness and a sense of larger purpose at the heart of the community. In other words, key to living into Beloved Community are leaders who understand and are equipped to help lead this culture and spiritual change.

Institutional sustainability is a reflection of the operational and financial well being of the Association, and the financial capacity to live the pastoral and prophetic ministry we are called to in the world. Institutional sustainability could be solely defined as an assurance that the UUA and our larger faith will continue in perpetuity. However, a more important indicator would be the balance of financial health alongside clear indicators of mission impact and growth in our congregations and communities. An additional marker of overall institutional sustainability is the financial well-being of our congregations and of our religious professionals.

### **Metrics and Monitoring**

Many of the particulars of this Global End are expressed in greater detail in Ends 1.1-1.8, with corresponding measurable indicators of congregational and leadership health and well-being. What is not measured in other places including financial metrics related to institutional sustainability, is measured here:

Measure income data over time with a specific goal (e.g. 15% increase in overall income in the next 5 years).

Measure the change in numbers of congregations and covenanting communities. (This metric is from Policy 1.7) *Note: For the record, the Administration does not think establishing new congregations should be a priority over the next few years. The language of the policy called for an increase in congregations. Our focus would be better spent on equipping our existing congregations for health and on the wider call for prophetic ministry and leadership in the larger world, in the variety of forms it may take, while also maintaining some support for innovative and creative new forms of ministry.*

Strike the existing metric that 60% of strategic programs are being assessed. The assessment tool described in current monitoring reports was never completed. Instead, focus on a practice and process for bringing continuity to how we assess programs and offerings of UUA described in later Ends. It could involve further developing the initial proposal (INSIGHT) or taking assessment in a new direction. It is too soon to tell the best avenue, but we retain a commitment to regular, ongoing program assessment.

Report annually on the number of people receiving credentials for ministry and the number of people in process for lay ministry and lay leadership certification, including measuring for diversity in each group. Track trends over time, establish baseline to create goals.

Implementation goals for 2018: Work with Treasurer to establish regular indicators to measure institutional sustainability. For example, measures that might indicate endowment health, ratios of endowment to operations that reflect long term sustainability, or goals for long term-strategic budgeting to correspond with 3-5 year strategic plans.

## **Ends Policy 1.1**

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

Generally agree with current interpretations. Recommend being more specific about financial and numerical metrics and trends that would indicate congregational health.

## Metrics

### Measure Covenanted and Accountable:

- Increase over time of congregations that have safe congregation policies and or covenants of right relationship and disruptive behavior policies (healthy practices for engaging conflict) - (e.g. goal of 85% of congregations over 50 members having these policies, baseline is 70% of total congregations in 2017).
- Metrics on success of ministries, year-to-year data on number of negotiated resignations; create way to break out to track POI ministers and others with historically marginalized identities [Establish baselines and track over time; also investigate ways to track this for other religious professionals]
- Percentage of congregations with religious professionals a part of LREDA, UUMA, UUMN [Establish baselines]
- 100% of congregations complete annual survey, certification (Establish baselines first)
- Need further exploration of what conflict looks like in a healthy congregation to understand whether and what we might measure.

### Measure Healthy and Mission-Driven:

- Measure congregational trends in income and expense over time (e.g. what should goals be? How can we break those goals down?) [Establish some baselines and categories]
- Measure overall membership numbers and number of people served by Unitarian Universalism (Policy 1.6) – what should our goal be? (e.g. 5% increase in members over the next 5 years; 5 % increase each year of number of people served by congregations)
- Track trends in religious education enrollment and participation
- Percentage of congregations that report having a clear mission or purpose. (in 2016; 90% reported yes) – *propose strike this and shift to a more pointed question below:*
- Percent of congregations that have a mission, strategic goals or clear purpose that drives or challenges the work and ministry of your congregation? (Use this to replace previous question? Have a goal, e.g. 75% of congregations have a mission that drives their ministry)
- Measure number of congregations engaging in capital campaigns in last 5 years. (establish baseline, then goals) capital campaigns are visionary; can indicate congregation stretching

## **Ends Policy 1.2** (combination of 1.2 and 1.5)

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

## **Interpretation**

The bonds of covenant between congregations and communities and the UUA makes congregations more effective at living their mission. Congregations and communities see the UUA and other congregations as a critical support to their success.

## **Metrics**

- Measure APF attainment rate over time (percentage of requested contribution that is actually fulfilled). Move in direction of setting clear goals around attainment and percentage of congregations that are Honor congregations after we move through the transition to new APF (in 2 years)
- Increase of congregations reporting collaborative work with other UU congregations (e.g. an increase of from 75% to 85% of congregations over 5 years)
- Increase of congregations participating in UUA regional or national offerings (need to create and implement systems to better track participation and evaluate impact)
- Increase of congregations participating at General Assembly, or District Assemblies/Regional Assemblies (e.g. 80%)
- Create annual question in Congregational Questionnaire about the degree to which UUA resources support the spiritual and religious exploration in the congregation (offer comments for more qualitative data)
- Create annual question in Congregational Questionnaire about the degree to which UUA enhances congregation operations (qualitative)
- Question: Should we assess qualitatively impact of congregational partnerships at this point, or just track their existence and depth of the partnership and changes to these metrics over time? For example add to Congregational Questionnaire the previous two questions but specifically about support from other UU congregations. (Need to balance reality that if there are too many questions, fewer congregations will respond)
- Implementation Goal: establish ways to measure impact of the UU offerings. Standard evaluation questions for all programs or end of year survey tool to assess impact of program.

## Ends Policy 1.3

Congregations and communities are intentionally inclusive, multigenerational and multicultural.

### Interpretation

Largely agree with the existing interpretation but with more additional, specific metrics. Additionally, this must include the UUA modeling this work itself. Include in interpretations the language of dismantling white supremacy.

### Question for the Board

Do we need to be more specific about the multiculturalism and the diversities we especially wish focus? Working on inclusion in any area can support greater cultural flexibility in all areas; however, would it be more helpful and specific to be clear about particular diversities we wish to focus, for example race? Could we be more specific about the changes or learning goals we hope our congregations will be able to make, e.g. diversifying membership versus engaging in anti-racist activism versus supporting personal identity development?

### Metrics

- Diversity of UUA staff – goals according to new hiring procedures
- Member and staff diversity in congregations – establish baseline (e.g., goal of 5% increase in 5 years).
- Diversity of UUA committees and leadership teams – (e.g. 40% of people not of dominant group)
- Tracking number of religious professionals of color (establish baseline, set goals for increase over time)
- Measure success/outcomes for religious professionals of color (metric also shows up in 1.0)
- Percentage of congregations in transition doing Beyond Categorical Thinking (track over time, e.g. goal 100%)
- Track participation in congregations AIM (Accessibility and Inclusion Ministry) and Welcoming Congregation

## Policy 1.4

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

Edited this End from “counter systems of power, privilege and oppression” to make the language more specific and current.

## Interpretation

Frame as impact/outcome – rather than tactic. For example: The UUA, congregations, and communities will be effective partners in making measurable change in dismantling systems of white supremacy and oppression, with specific focus on issues that most closely touch our core values, including issues of equity with respect to identity and issues of climate justice. Make it a clear priority to partner with frontline communities and organizations that are primarily led by and representative of POCI.

## Metrics

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

# Policies to be combined, removed, de-prioritized, or need further discussion.

## Combine Policies 1.2 and 1.5

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.

Policy 1.5 - Congregations and communities have and use UUA 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.

Combined for revised End 1.2: Congregations and Communities see their covenant and partnership with the UUA and other congregations as a critical support to deepen the spiritual and religious development of their people, enhance their mission and operations, and spread the ideals and principles of Unitarian Universalism.

## Policy 1.6

There is an increase in the number of people served by Unitarian Universalist congregations and communities.

*Recommend remove; it is a metric and not an end; put metric under 1.1*

## Policy 1.7

There is an increase in the number of Unitarian Universalist congregations and communities

*Recommend remove, metric and not an end. Deprioritize but continue to measure.*



## 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.

*Recommend remove, metric and not and end. Use related metrics in 1.0 & 1.1*

## Ends Policy 1.9

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

**Interpretation:** This speaks primarily to other UU institutions that are not directly members of the UUA (i.e. not congregations or covenanted communities).

Lower priority in this initial period and engage deeper conversation about meaning of this End with the Board. A number of our UU institutions (UUSC, UUMA, UUWF) are in some form of leadership transition. Maintain robust commitment to partnership; but engage larger conversation about how the UUA impacts the health and vitality of other organizations; what our appropriate role is and how we would measure our success.