



RENEWING THE WELCOMING CONGREGATION

Being recognized as a Welcoming Congregation is just the beginning of commitment to the ever-ongoing work of welcoming and inclusion.

Congregational membership and leadership changes, combined with changes in the wider culture, make it important for Welcoming Congregations to undergo an assessment and recommitment process every five years.

In this intentional process, a congregation identifies where it is on the welcoming journey, highlights and celebrates its strengths, identifies unaddressed needs, and recommits to deepening its welcome.

This assessment can be accomplished in a variety of ways. The following process is recommended by UUA Multicultural Ministries.

APPOINT AN ASSESSMENT TEAM

For a Welcoming Congregation initiative to be successful, the congregation's leadership, including the board and professional staff, needs to commit to the process. This is also true when a congregation renews its Welcoming Congregation commitment.

It is recommended that the board appoint a diverse, time-limited Assessment Team of six to ten people. Consideration should be given to identifying members who represent a cross-section of the congregation in terms of age, sexual orientation, gender identity, family construct, abilities, race and ethnicity, longevity of membership, and leadership experience.

This team is charged with conducting an assessment and making recommendations to the board about next steps in the welcoming journey. It is expected that this can be accomplished in six to eight meetings or less, but this may vary depending on the process the team decides to use.

CONVENE THE ASSESSMENT TEAM

The first meeting of the Assessment Team is a time to get to know one another, establish a covenant, and develop a plan for your work together. Remind people that this is a sacred space in which you'll be doing important work. Start the meeting by lighting a chalice. You might also share a reading or sing a hymn together.

GET TO KNOW EACH OTHER

Even if everyone knows everyone else's name, you might want to take time to get to know each other more deeply. Questions you might ask each member to respond to include:

- How long have you been a member of this congregation? How long have you identified as Unitarian Universalist?
- What gender pronoun do you prefer people use in reference to you?
- What is your interest in LGBTQ welcome and inclusion?
- What do you hope will come from your work on this team?

Go around the circle and give each person a minute or two to respond, or divide up into dyads and ask people to share with each other and then come back to the larger group and introduce the person they talked with. Remind people to practice deep listening as people share about themselves.

ESTABLISH A COVENANT

If you have a congregational covenant, read this together, and ask everyone to commit to following it throughout this process. If you do not have a covenant to share, develop one for the team. See [Covenant of Right Relations](#) for more information.

DEVELOP A PLAN FOR YOUR WORK TOGETHER

The work of the Assessment Team is divided into three distinct phases:

Review the congregations Welcoming Congregation history to assess successes and gaps

Assess the status of the commitments the congregation made at the time of its original recognition as a Welcoming Congregation

ASSESS SUCCESSSS AND GAPS

The following suggested tasks can help the Assessment Team lift up the excellent LGBTQ welcome and inclusion work that the congregation has already done and determine what gaps still exist.

1. Make an inventory/listing of LGBTQ-specific work that the congregation has done in the last five years in each of the three following areas:
 - a) educational/spiritual needs
 - b) community life and infrastructure
 - c) external partnerships/relationships/outreach
2. As the Assessment Team reviews the list, determine if there are trends that emerge. For example, does most of the work fall into one area? Does the congregation have a strong program of education but few, if any, community partnerships? If a new person enters your building, would they feel welcome by what they see and hear?
3. If available, talk to people who were on the Welcoming Congregation committee at the time of the congregation's original application for Welcoming Congregation status and ask them:
 - a) What motivated the congregation to apply at the time of initial application?
 - b) What challenges/resistance did the original team face?
 - c) What were they most positively surprised by?
4. If the Assessment Team can access the original application, take a look at the work the congregation did then.
 - a) How much of that work is still relevant?
 - b) How much of it is continuing today?
 - c) Did the congregation implement the future plans that were part of the original application?
5. On newsprint, draw a portrait in images and words of the congregation at the time it originally became a Welcoming Congregation and another one of the congregation now.

- a) What has changed in the congregation since you first became a Welcoming Congregation?
- b) How is the membership different than it was then? How is it the same?
- c) What has changed in the local community/the larger world in regard to acceptance of LGBTQ people? What hasn't changed?
- d) If it is possible to determine, approximately, what percentage of the membership is LGBTQ? Has that changed in the last twenty years? How so?

ASSESS COMMITMENTS

The next step is to conduct an assessment based on [commitments the congregation made at the time of its first recognition](#). The Welcoming Congregation Assessment Guide is a survey, based on the [Guidelines and Actions Steps for Welcoming Congregations](#), which can help the Assessment Team in this process. In many congregations, the Assessment Team might have the background and experience to adequately assess the congregation without soliciting additional input.

In other congregations, especially in congregations where the motivation to revisit the Welcoming Congregation Program came as the result of conflict, gathering input from the congregation's leadership, or from the congregation as a whole, might be the preferred process.

Both options, ASSESSMENT BY THE ASSESSMENT TEAM and ASSESSMENT THROUGH THE CONGREGATION'S INPUT, are described below.

ASSESSMENT BY THE ASSESSMENT TEAM

If the Assessment Team feels confident that, after exploring the history of the Welcoming Congregation journey, they have the knowledge and experience to rate the congregation on its Welcoming Congregation commitments, ask each member of the Team to independently complete the Welcoming Congregation Assessment survey (see Welcoming Congregation Assessment Guide) according to how well each of the commitments describes their congregation.

If your Assessment Team is eight or fewer members, compiling the ratings and coming to consensus can usually be completed in a two-hour meeting, especially if team members have had the opportunity to complete the assessment survey before the meeting. However, you might want to divide this process into two meetings, or plan a three-hour meeting with a break at the midway point, to allow for more in-depth discussion.

The following suggested process for a survey review meeting offers each person on the Assessment Team an opportunity to share their thoughts about each item and to hear the thoughts of others, without interruption or discussion. It then allows for the team to discuss the items where there is disagreement and come to consensus on each item. In places where significant disagreement exists, it allows for further input before coming to consensus.

SHARE YOUR COVENANT

Start the meeting by lighting a chalice. If you have already established a team covenant or, if you have a congregational covenant, read this together. If you do not have a covenant to share, develop one for the team. See [Covenant of Right Relations](#) for more information.

ESTABLISH ROLES

Invite people to serve in the roles of facilitator, recorder, timekeeper, and process observer.

- The facilitator encourages deep listening and assures that each person has space to state the reasons for their scores without interruption from others.

- The recorder records the rating scores from each person, key reasons for each rating, and tallies the results.
- The timekeeper monitors the time each speaker has and signals when the speaker has run out of time.
- The process observer reflects to the group how well they are maintaining their covenant with each other.

SHARE IN A SHARING CIRCLE

1. The facilitator invites the members to go around the circle and state their score for the first item on the Welcoming Congregation Assessment survey and state why they rated as they did. Give each person thirty seconds for this part of the process.
2. With no discussion, move on to the next person.
3. After each person has stated their rating for an item and their reasons for it, the facilitator asks if members want to ask any clarifying questions or change their scores based on what they heard from others. This is not the time to disagree with or support the scores or stated reasons.
4. The recorder summarizes the final score(s) for that item, i.e., how many of each rating – not an average.
5. Repeat Steps 2 - 4 until you've completed all twelve items (or six items if you are dividing the meeting into two).

COME TO CONSENSUS

6. After each team member has stated their reason for each item, the recorder identifies those items where there is a significant agreement and those items where there is significant disagreement.
7. Review the items where there is significant agreement to assure that everyone accepts/is comfortable with the final rating. Ask the recorder to document any caveats to the agreed upon rating where that seems important.
8. Review the items where there is significant disagreement. Discuss each item, paying attention to careful listening, and work to come to consensus. If after a designated time (ten minutes or less, unless a longer time is agreed upon), consensus is not possible, ask the recorder to document the main reasons for each position, and then move on to the next item where disagreement exists.

GATHER MORE INPUT, AS REQUIRED

9. If significant disagreement exists on more than four of the twelve assessment items, the team might decide to invite the wider congregation's input on the entire assessment. See INVITING THE CONGREGATION'S INPUT below.
10. If consensus cannot be reached on four or fewer items, ask two or more people on the team to interview five to ten other people in the congregation, asking how they would rate the congregation on the unresolved item(s) and the reasons for their rating. The interviewer should record the rating(s) and notes about the reasons from each person they interview. It is important that each person is asked their opinion and the reasons for their opinion without prejudice from the Assessment team member, in other words, without the Assessment Team member sharing their opinion or influencing the person in any way.
11. When the Assessment Team reconvenes, review the input received on the unresolved item(s) and try again to come to consensus. If consensus is still not possible, include the reasons on all sides of the discussion in the team's report to the board.

Skip to DEVELOP RECOMMENDATIONS for next steps.

ASSESSMENT THROUGH CONGREGATIONAL INPUT

In some congregations, the Assessment Team might decide that it is preferred to solicit input from others in the congregation on the Assessment survey questions.

Because LGBTQ people and other historically-marginalized people might not feel connected enough to a congregation to join, even if they share the congregation's mission and vision, you might want to extend a personal invitation, not only to current members, but to friends, and perhaps even former members of the congregation to complete the assessment survey.

This survey can be converted into an online survey or be distributed on paper.

REFLECT ON RESULTS

If the Assessment team conducts a congregation-wide assessment, hold an Assessment Team meeting to review the results, identify any outstanding questions it might have as a result of the data, and develop a plan to address the questions. For example, if fifty of the respondents rate a survey item as Agree or Strongly Agree (4 or 5), fifty rate the survey item as Disagree or Strongly Disagree (2 or 1) and everyone chooses Neutral (3) or Don't Know, this item demands further reflection.

A more detailed analysis of the reasons for the ratings and/or the demographics of those answering might give insight into this dichotomy. Perhaps respondents interpreted the question differently or perhaps generational differences or differences in gender identity or sexuality might point to reasons for the dissimilar answers.

DEVELOP A REPORT AND RECOMMENDATIONS

Once the Assessment Team has reviewed the congregation's history of LGBTQ welcome and inclusion work, and feels it has a reasonable understanding of the results, its job is to develop a report of its findings and recommendations to celebrate the congregation's strengths and address those areas that need improvement.

For example, if item #3 in the Welcoming Congregation Assessment Survey, "An understanding of the experience of lesbian, gay, bisexual, transgender, and queer persons is fully incorporated by our congregation throughout all programs, including religious education," is rated as 2 or 3, the reasons might indicate that although the experience of lesbian and gay persons is incorporated throughout all or most programs, the congregation is not knowledgeable about the lives of bisexual, transgender, and queer persons. A recommendation might be to offer training specifically addressing bisexual, transgender, and queer identities.

On the other hand, if #4, "The bylaws and other official documents of our congregation include an affirmation and nondiscrimination clause affecting all dimensions of congregational life, including membership, hiring practices, and the calling of religious professionals," rates a 5, the Assessment Team might recommend that this is celebrated through a newsletter article, blog post, or other means to highlight the excellent work in this area.

Suggested actions steps that might be included in a recommendations report are available on [Welcoming Congregation Refresher Program](#) on the UUA website.

The team's report to the board might take many forms, for example, a formal written report, a live presentation with text and photos, a video, a collage, etc., depending on the creativity and the culture of the team.

DEVELOP AN IMPLEMENTATION PLAN

The board receives the report from the Assessment Team and decides how the recommendations can best be incorporated into the congregation's strategic plan. It might decide to form a Welcoming Congregation Committee, [Interweave](#) group, or other LGBTQ/Multicultural committee, if one does not already exist, or charge an existing committee with overseeing implementation of the plan.

The board is encouraged to request regular reporting from the committee so that it knows that work is moving forward.

APPLY FOR RENEWAL OF WELCOMING CONGREGATION STATUS

When the board is confident that the congregation has implemented the recommendations and, as a result, has deepened its welcome, it's time to [Apply for Official Renewal of Your Welcoming Congregation Status](#).

Upon renewal, the congregation will receive a formal letter of renewal, two new Welcoming Congregation posters, and permission to use the new Welcoming Congregation logo (Boards may request permission to use the new logo as soon as they commit to a process of renewal by sending formal notice to lgbtq@uua.org that it has started this process).

Congregations are encouraged to hold a public celebration to highlight its ongoing commitment to LGBTQ welcoming and inclusion. This offers a valuable opportunity to connect with community partners and for media coverage of the congregation and its work.