



Assessment of Progress on the Long Range Plan
Prepared by the Planning, Evaluation and Monitoring Committee of the UUCA Board of Trustees

April 22, 2014

Summary Assessments

The Planning Evaluation and Monitoring Committee is charged to provide to the Board a written assessment of progress on the Long Range Plan (LRP) no later than the April 2014 Board meeting. This report is based primarily on data from the Year 2 Implementation Plan / Monthly Executive Reports provided to the Board by Rev. Makar. Analyses of specific activities related to each aspiration are detailed in Table 1 (see Appendix). The summary assessments of progress in each aspiration area are given below.

Aspiration One

For Aspiration One, a variety of activities have been completed or are in process (see Table 1 for specifics) in all of the subareas of the aspiration. However, with almost no exceptions, there has not been assessment/evaluation of the effect of those actions or measurement of the outcomes produced. In order to determine achievement of the aspiration and its subparts, attention must be given in Implementation Year 3 to collection, analysis, and use of measurements that will provide means by which to determine if the desired outcomes of the aspiration have been achieved and direction for revising, adding, or deleting related activities.

Aspiration Two

The Social Justice Coordinating Team has been created in order to build an infrastructure to support our social justice efforts. That team appears to be given responsibility for achieving most of the subareas of this aspiration, as well as evaluating our effectiveness in the realm of social justice. However, there are no external measures in place to evaluate the effectiveness of the Social Justice Coordinating Team itself. In addition, there are two initiatives, the all-congregation social justice mission and the social justice center, for which work has not even begun. It may be worth amending the plan so that efforts can focus on just one of these. It would be useful to define key goals for Implementation Year 3 so that there are clear measurements of success or failure at achieving those goals. For example, a goal could be set to have 20% of the congregation participate in some social justice activity during the year.

Aspiration Three

For Aspiration Three, there have not been activities undertaken targeted specifically to most of the subareas of the aspiration (see Table 1 for specifics). For those that have had attention and considerable associated activity (particularly the redesign of the various UUCA communication vehicles), there has not been any formal assessment of the effectiveness of the changes in achieving the desired aspirational outcomes. As with Aspiration One, Implementation Year 3 will need to include attention to collection, analysis, and use of measurements that will provide means by which to determine if the

desired outcomes of the aspiration have been achieved, as well as attention to the various aspects of Aspiration Three that have not had focused activities directed toward them.

Aspiration Four

A number of teams and task forces have been started to implement efforts related to Aspiration Four. However, it is unclear whether these groups have been given measurable goals to achieve. Without such goals, assessing the success of these teams and the initiatives they support will be difficult. For activities that have been completed, such as the stewardship campaign, any evaluation or assessment of the end result has not been published (as part of the Executive Report). Implementation Year 3 will need to include clear targets and missions for these projects and teams and the process should involve an honest report of success and failure.

Application of Congregational Survey Results to Assessment of Long Range Plan Progress

The 2014 Congregational Survey questions were written to reflect the congregation’s assessment of how well we are doing in making progress toward our Ends Statements and not to directly measure progress on the Long Range Plan. However, some of the questions can be mapped to aspects of the Long Range Plan, as shown in Table 2 (see Appendix). These assessments from the survey cannot indicate progress (or lack of progress) but rather provide some baseline data for comparison in the next congregational survey.

For those areas of the LRP that were reflected in survey questions, the aspiration subareas were rated as shown in the table below. Subareas that that have a majority of ratings below 4.0 merit increased attention during Implementation Year 3.

LRP Aspiration	# of Survey Items	Percent Rated 4.0 or Higher	Ratings 4.0 or higher	Ratings Below 4.0
ONE - CREATING a process for each visitor and member to find a place within the congregational community	1	100%	4.65	
ONE - INCORPORATING many communities and cultures in our worship services and programming	7	71%	4.49, 4.25, 4.18, 4.13, 4.06	3.99, 3.96
ONE - NURTURING fellowship among congregants and providing pastoral care	6	0%		3.97, 3.95, 3.95, 3.79, 3.74
ONE - OFFERING opportunities and experiences that nurture the spiritual growth of each congregant	2	100%	4.31, 4.05	
TWO - LEADING peace and justice initiatives to become a more visible justice-seeking congregation	7	43%	4.22, 4.08, 4.01	3.95, 3.89, 3.79, 3.72
FOUR - MAKING a home that allows us to reach our full potential in mission and membership	1	0%		3.86

The Congregational Survey indicated that the Ends Statement that most resonates with the survey respondents ranked in the following order (from most to least):

1. Ends Statement 1: A vibrant faith community for spiritual seekers that worship together, embracing lifelong religious learning and respecting different spiritual journeys.
2. Ends Statement 3: A safe and welcoming community where all are valued.
3. Ends Statement 6: A creative community that challenges us to see the world with new perspectives and gives voice to the human spirit through music and the Arts.
4. Ends Statement 5: People with a passion for social and economic justice who work together for human rights and a sustainable environment.
5. Ends Statement 2: A loving community that provides support and care for others through both the best and the most difficult of times.
6. Ends Statement 4: Children and youth centered in the values of our religious community and nurtured in love, who are compassionate leaders in seeking justice and peace.

The correspondence between the Ends Statements and the LRP aspirations, like the questions in the survey, is not exact, but can be mapped (see Table 3 in Appendix). While not suggesting any useful assessment of LRP progress, keeping in mind the relationship between the Ends Statements and LRP Aspirations may assist in making choices of what activities should be given priority in Implementation Year 3.

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Table 1: Progress on Long Range Plan Aspirations

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
<p>One: We will be among the most engaging and enriching congregations in Atlanta by:</p>			
<p>INVOLVING and VALUING every person who steps through our doors in participation beyond Sunday services</p>			
<ul style="list-style-type: none"> CREATING a process for each visitor and member to find a place within the congregational community; 	<ul style="list-style-type: none"> Connector Teams staff Welcome Kiosk each Sunday Exploring UUCA participants surveyed Dec. 2013 Feedback on visitor experience collected each Sunday 	<ul style="list-style-type: none"> No evidence of effectiveness No data from survey presented No analysis of visitor feedback 	<ul style="list-style-type: none"> Collect data on number/success of referrals Analyze data from survey; conduct survey on regular basis; report conversion rates Analyze and apply visitor feedback to make needed changes
<ul style="list-style-type: none"> INCORPORATING many communities and cultures in our worship services and programming; 	<ul style="list-style-type: none"> Interim playground created Plan for permanent playground developed Diversity Team created and meetings held Diversity Workshop held Expanded participation in Pride Parade Blessing of Marriages event 	<ul style="list-style-type: none"> Playground in use; no data on effect on RE attendance AR/AO/MC audit of UUCA website; no changes made yet Intercultural Development Inventory assessment 100-125 UUCA members/congregants in Pride Parade Participation by 27 couples and 12 officiants 	<ul style="list-style-type: none"> Construction of permanent playground; assessment of effect on RE Changes to expand multicultural dimensions of UUCA Board examination of Ends Statements and Executive Limitations for needed changes to reflect AR/AO/MC values Continued focus on commitment to GLBTQ community Assessment of impact of event

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
<ul style="list-style-type: none"> • EXTENDING educational offerings for congregants and the larger community; 	<ul style="list-style-type: none"> • Establishment of Minister of Lifelong Learning and Growth position • Restructuring of Coming of Age program 	<ul style="list-style-type: none"> • Position description developed • New class launched; no data on success available 	<ul style="list-style-type: none"> • Hire for new position • Creation of Religious Exploration Coordinating Team • Creation of Youth Ministry Team • Assess participation in and effectiveness of Adult RE Programs
<ul style="list-style-type: none"> • NURTURING fellowship among congregants and providing pastoral care; 	<ul style="list-style-type: none"> • Creation of Fun and Fellowship Coordinator position • Transition of pastoral care program to lead lay minister • Recruitment of new class of lay ministers • Realignment of lay minister portfolios • “Month of Love” contact with congregants 	<ul style="list-style-type: none"> • Position filled; no evidence yet of effectiveness • No data on success of revised pastoral care program available • 6 new lay ministers in training • No data on effectiveness of portfolio realignments • No data on effectiveness of “Month of Love” 	<ul style="list-style-type: none"> • Collection/analysis of data on effectiveness of position • Collection/analysis of data on effectiveness of pastoral care program • Integration of new lay ministers into system • Collect data on effectiveness of lay minister programs • Collect and analyze data on impact of initiative
<ul style="list-style-type: none"> • OFFERING opportunities and experiences that nurture the spiritual growth of each congregant 	<ul style="list-style-type: none"> • Assessment of effectiveness of covenant group process • Implementation of theme-based worship model • Sermon series on Unitarian Universalist essentials 	<ul style="list-style-type: none"> • Assessment not completed • No data on impact of change to theme-based model • No data on impact of sermon series 	<ul style="list-style-type: none"> • Complete assessment and make changes based on results • Design and implement assessment tool for changes in worship model and sermon topics; use results for change

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
Two: We will increase our impact in the larger world by:			
LEADING peace and justice initiatives to become a more visible justice-seeking congregation,			
<ul style="list-style-type: none"> BUILDING UUCA in Atlanta through social justice advocacy, direct service, and social witness; 			
<ul style="list-style-type: none"> EDUCATING the congregation about unmet peace and justice needs; 			
<ul style="list-style-type: none"> CREATING an infrastructure to empower congregants to perform, coordinate and participate with community groups working for peace and justice. 	<ul style="list-style-type: none"> Social Justice Coordinating Team (SJCT) created 	<ul style="list-style-type: none"> Team exists and has met 	<ul style="list-style-type: none"> Vet all official UUCA justice groups (all groups in fact), as per the terms of our Official UUCA Groups Policy Create process for youth group to choose annual justice project (from Year 1) Complete and approve process for taking congregational stands (from Year 1)
<ul style="list-style-type: none"> SELECTING an all-congregation social justice mission that makes a difference in the lives of Atlantans, 			
<ul style="list-style-type: none"> DEVELOPING an all-congregational process to select the mission so that all voices are heard; 			
<ul style="list-style-type: none"> PROMOTING the mission to generate enthusiasm and widespread participation. 			

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
<ul style="list-style-type: none"> ESTABLISHING a social justice center to develop and support peace and justice work in Atlanta 			
<ul style="list-style-type: none"> BUILDING a coalition of community activists based on assessed needs; 			
<ul style="list-style-type: none"> OFFERING workspaces and resources for non-profit groups 			
<ul style="list-style-type: none"> PROVIDING leadership, organizational development, training, mentoring, information and referrals. 			
<p>Three: We will motivate and inspire ourselves and others by:</p>			
<p>DEVELOPING our communication strategies to motivate and inspire congregants' personal and spiritual growth.</p>	<ul style="list-style-type: none"> Creation of Communications specialist position Redesign of various communication vehicles 	<ul style="list-style-type: none"> Position filled initially and new hire now in place; no specific data on effectiveness of structure No formal evaluation of impact of redesigned communication vehicles 	<ul style="list-style-type: none"> Formal evaluation of effectiveness/usability of communication vehicles for various UUCA user communities
<ul style="list-style-type: none"> PUBLICIZING, through a variety of channels and formats, the weekly sermon with links to related advocacy, events, and service opportunities; 	<ul style="list-style-type: none"> No specific actions, other than inclusion on web site 		
<ul style="list-style-type: none"> SHARING inspirational messages and resources in various venues; 			
<ul style="list-style-type: none"> STRENGTHENING the internal focus of the website. 	<ul style="list-style-type: none"> Website redesigned and updated 	<ul style="list-style-type: none"> No independent assessment of effectiveness of new site 	<ul style="list-style-type: none"> Do user effectiveness assessment, including attention to "internal focus" Revise website content as needed

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
DOCUMENTING AND PROMOTING living our mission and our faith at UUCA,			
<ul style="list-style-type: none"> TELLING our inspiring stories to foster engagement, promote UUCA in the wider community, and ensure that UUCA is a leading liberal religious voice in the metro Atlanta media. 			
EQUIPPING congregants, groups and staff with up-to-date communication technology and strategies			
<ul style="list-style-type: none"> DEVELOPING and updating annually a detailed communication operations plan, technology and services to carry out strategies; 			
<ul style="list-style-type: none"> INSURING consistency and UU “brand promotion”; 			
<ul style="list-style-type: none"> TRAINING congregants to tell our UU stories, articulate our faith, and invite participation in our community. 	<ul style="list-style-type: none"> “Unitarian Universalist Essentials” Sermon Series “Building Your Own Theology” course 	<ul style="list-style-type: none"> No information on effectiveness of series No data on course participation or effectiveness 	<ul style="list-style-type: none"> Assess effectiveness of sermon series Design/implement assessments of effectiveness of course (and other Adult RE offerings)
<p>Four: We will have the resources to fulfill our aspirations and potential by:</p>			
DEVELOPING a stronger culture of generosity and stewardship that is inspiring, year-round, transparent, sets expectations for giving, and provides clear goals for funding programs, outreach, and facilities.	<ul style="list-style-type: none"> Rising to Our Vision: Piece by Piece Stewardship Campaign for 2014 Generosity Team enhances giving at UUCA 	<ul style="list-style-type: none"> Targets of Stewardship Campaign not met 	<ul style="list-style-type: none"> Assess the degree to which our giving culture is generous Assess the degree to which people have a clear sense of giving expectations at UUCA

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
MAKING a home that allows us to reach our full potential in mission and membership,			
<ul style="list-style-type: none"> IDENTIFYING and PRIORITIZING deficiencies that can be fixed in our current facility; 	<ul style="list-style-type: none"> Building and Grounds team formed 		<ul style="list-style-type: none"> Professional evaluation of building to proactively estimate future repairs, as financial resources permit
<ul style="list-style-type: none"> CREATING a plan to optimize space utilization and a facilities maintenance plan; 	<ul style="list-style-type: none"> Facilities Task Force Safety Plan Implementations 	<ul style="list-style-type: none"> Unclear if a maintenance plan exists Unclear if a drill has occurred 	
<ul style="list-style-type: none"> FUNDING a facilities feasibility study to address long-term needs in mission and membership 	<ul style="list-style-type: none"> Sermons addressing building issues Meetings with consultant Connie Goodbread 		<ul style="list-style-type: none"> Formation of Facilities Study Team Conduct actual study
PROVIDING the human and financial resources to reach our full potential in mission and membership			
<ul style="list-style-type: none"> ACHIEVING UUA Fair Compensation for all staff 	<ul style="list-style-type: none"> Fair Compensation plan approved 	<ul style="list-style-type: none"> Plan exists 	<ul style="list-style-type: none"> Get all staff to appropriate compensation levels
<ul style="list-style-type: none"> ATTAINING sustainable staffing levels that meet UUCA's needs; 	<ul style="list-style-type: none"> Planned staffing reconfiguration to add Director of Congregational Life and Minister of Lifelong Learning and Growth 		<ul style="list-style-type: none"> Evaluations and assessments of revised staffing configuration needed after implementation
<ul style="list-style-type: none"> IMPLEMENTING a plan for recruiting, supporting, and recognizing congregants as volunteers 			<ul style="list-style-type: none"> Assess volunteerism at UUCA

ASPIRATION	MAJOR ACTIVITIES (NEW INITIATIVES) COMPLETED	EVIDENCE OF ACHIEVEMENT OF OUTCOMES	REMAINING WORK
INSTITUTIONALIZING a congregational Long Range Planning process on an ongoing basis, including an annual report from the Board of Trustees to the congregation on progress toward realizing the goals of Vision 2016	<ul style="list-style-type: none"> • Monthly reporting to Board • Annual report to congregation on progress 	<ul style="list-style-type: none"> • Monthly Executive Reports 	<ul style="list-style-type: none"> • Processes for revising and updating the Long Range Plan on a continuous basis

**Table 2:
Baseline Measures for LRP Aspirations from 2014 Survey Results**

LRP ASPIRATION	SURVEY ITEMS THAT RELATE TO LRP ASPIRATIONS	MEAN
Aspiration ONE		
1 CREATING	14. I feel UUCA is a safe place for me (and my family).	4.65
1 INCORPORATING	15. I feel UUCA is a welcoming place inclusive of all...for me (and my family)	4.49
1 INCORPORATING	33. I have seen the world in a different way because of music, theatre, visual art, and other artistic expression at UUCA.	4.25
1 INCORPORATING	15. I feel UUCA is a welcoming place inclusive of all...for others	4.18
1 INCORPORATING	17. UUCA has provided me with opportunities to expand my understanding of anti-racism, anti-oppression, and multiculturalism (AR/AO/MC).	4.13
1 INCORPORATING	1. At UUCA I experience a rich and diverse worship life with religious practices and rituals that nourish, challenge, and inspire.	4.06
1 INCORPORATING	17. I see UUCA making progress on AR/AO/MC.	3.99
1 INCORPORATING	17. I have found opportunities to reflect AR/AO/MC in my actions.	3.96
1 NURTURING	7. UUCA has provided me or fellow congregants with compassionate pastoral care in times of joy, sorrow, and transition.	3.97
1 NURTURING	11. UUCA helps us honor important hallmark events in the lives of members and the congregation itself.	3.95
1 NURTURING	16. UUCA provides me with ample opportunity to connect with others across age groups and diverse identities.	3.95
1 NURTURING	23. UUCA provides adequate opportunities for adults to share wisdom and compassion with children and youth.	3.95
1 NURTURING	8. I believe I make a positive impact on the lives of others at UUCA.	3.79
1 NURTURING	10. UUCA newsletters and other communications help me feel well-connected to other congregants.	3.74
1 OFFERING	34. I have had a spiritual experience as a result of music and the arts at UUCA.	4.31
1 OFFERING	3. At UUCA, I have found opportunities for growth and engagement that have helped me to work on my own spiritual development.	4.05
Aspiration TWO		
2 LEADING	28. UUCA advocates and educates in the public arena for liberal religious values in response to prejudice, injustice, and oppression.	4.22
2 LEADING	27. UUCA's social justice activities resonate with me personally.	4.08
2 LEADING	30. UUCA is...(B) a collaborator with other faith communities and justice organizations	4.01
2 LEADING	30. UUCA is...(C) a convener of meaningful dialogue on issues related to UU values	3.95
2 LEADING	30. UUCA is...(A) a visible leader on social justice issues	3.89
2 LEADING	26. As a result of my involvement with UUCA, I put forth more effort to address issues of social justice.	3.79
2LEADING	25. My UU faith is the foundation for the social justice actions I take in my life.	3.72
Aspiration FOUR		
4 MAKING	18. The resources and facilities of UUCA are well managed and maintained in order to support UUCA as a safe, welcoming community.	3.86

Table 3: UUCA Ends Statements Matched with Long Range Plan Aspirations & Goals

Ends Statement	Long Range Plan Aspiration	Goals related to the Aspiration		
A vibrant faith community for spiritual seekers that worship together, embracing lifelong religious learning and respecting different spiritual journeys.	One: We will be among the most engaging and enriching congregations in Atlanta by	CREATING a process for each visitor and member to find a place within the congregational community	INCORPORATING many communities and cultures in our worship services and programming	EXTENDING educational offerings for congregants and the larger community
A loving community that provides support and care for others through both the best and the most difficult of times.	One: We will be among the most engaging and enriching congregations in Atlanta by	NURTURING fellowship among congregants and providing pastoral care	OFFERING opportunities and experiences that nurture the spiritual growth of each congregant	
A safe and welcoming community where all are valued.	One: We will be among the most engaging and enriching congregations in Atlanta by	INVOLVING and VALUING every person who steps through our doors in participation beyond Sunday services		

Children and youth centered in the values of our religious community and nurtured in love, who are compassionate leaders in seeking justice and peace.	One: We will be among the most engaging and enriching congregations in Atlanta by	INCORPORATING many communities and cultures in our worship services and programming	EXTENDING educational offerings for congregants and the larger community	
People with a passion for social and economic justice who work together for human rights and a sustainable environment.	Two: We will increase our impact in the larger world by	LEADING peace and justice initiatives to become a more visible justice-seeking congregation	SELECTING an all-congregational social justice mission that makes a difference in the lives of Atlantans	ESTABLISHING a social justice center to develop and support peace and justice work in Atlanta
	Three: We will motivate and inspire ourselves and others by	TELLING our inspiring stories to foster engagement, promote UUCA in the wider community, and ensure that UUCA is a leading liberal religious voice in the metro Atlanta media.		

<p>A creative community that challenges us to see the world with new perspectives and gives voice to the human spirit through music and the Arts.</p>	<p>One: We will be among the most engaging and enriching congregations in Atlanta by</p>	<p>EXTENDING educational offerings for congregants and the larger community</p>		
<p>All Ends Statements</p>	<p>Four: We will have the resources to fulfill our aspirations and potential by</p>	<p>MAKING a home that allows us to reach our full potential in mission and membership</p>	<p>PROVIDING the human and financial resources to reach our full potential in mission and membership</p>	