COMPREHENSIVE CONGREGATIONAL SELF-ASSESSMENT MODEL

ORIGIN AND CONTEXT
This model was developed by John Buehrens and Lawrence Palmieri Peers. It is often recommended in conjunction with the Assessing Our Leadership Model. It is extraordinarily well though out and represents some of the best practices available. It also requires a significant investment of time and leadership. The model, including all forms, can be found on the UUA website at: http://www.uua.org/documents/ftp/congselfassessment.pdf

The model makes use of five parts:
I. Choosing A Leadership Team for the Congregational Self Assessment
II. Creating a Congregational Profile
III. Creating a Congregational Self- Assessment
IV. Creating Recommendations for Action
V. Identifying your Congregations Relationship to the Larger Community

Part III involves a multiple phase process which is divided up into four sections:
1. Gathering Data
2. Scoring Data
3. Interpreting Data

This model is designed to measure the general health of the congregation with the intent of identifying goals and objectives.

This model is used, ideally, when a congregation is about to embark on – or revisit – a long range planning process and would benefit from tapping into all the stakeholder’s perspectives. There is a capacity here to involve the entire congregation and invoke a greater sense of interest, awareness, ownership and accountability. This can nicely augment an assessment of the professional ministry and/or staff so as to create a more complete, holistic understanding of health and next steps.

BENEFITS OF THE MODEL
- Comprehensive
- Involves a great number of people
- Because of the broad participation and the depth of the exploration, the results have a tendency to be compelling
- Explores the systemic health, ie. The strengths, abilities, focus and passion of the whole rather than reporting on the strengths, abilities, focus and passion of a few people.

CHALLENGES OF THE MODEL
- Requires an incredible investment of time
- Requires the participation of key leaders as well as summoning the attention of those moving into leadership
- Requires follow up to incorporate findings into action plans and an intentional process to incorporate and monitor those plans in the future
PROCESS
I. CHOOSING A LEADERSHIP TEAM FOR THE CONGREGATIONAL SELF-ASSESSMENT:
The Board should designate a team to lead the congregational self-assessment. The team should always include the minister(s) and at least 3 or 4 experienced lay leaders. In smaller congregations a team of 4 or 5, including the current president, should be sufficient. Larger congregations, however, may prefer to include the chair of a strategic planning team, the church council, or former presidents.

There is much to be said for keeping the team to only 5 members, so that it can work efficiently. Even the largest congregation, however, should not use more than 9 people on the team. Consider including on your team a relative newcomer, a youth, a young adult, and people from diverse racial, cultural or economic backgrounds.

Consideration for assembling the team may begin with a list of participants answering the following three things:
1. Team member’s name
2. Role(s) played in your congregation
3. How long has person participated in your congregation?
The aim is to assemble a group of people who know both the people of the congregation and the systems of the church as well as know the congregation’s dynamics around change.

II: CREATING A CONGREGATIONAL PROFILE
This basic information about your congregation may not be known by every team member. One person on the Leadership Team can obtain this information and make it available for the rest of the team.

**Current Membership:**
- 1. Total number of current adult members.
- 2. Total number of adult non-members who participate in worship or other programs.
- 3. Total number of children (under 12 years old)
- 4. Total number of youth (ages 12 to 18 years old).
- 5. Total current participants and members of your congregation (add #1-4).

**Age Grouping of the Congregation:**
Report the number of members and participants who fall within the following age ranges?
Infant and Pre-school: __________0-5 years old
Elementary School Age: __________6-11 years old
Middle School: __________12-14 years old
Senior High School: __________15-18 years old
________18-24 years old
________25-29 years old

Early Young Adult Years:
Later Young Adult Years:
II. CONGREGATIONAL PROFILE

Visitors and New Members:

Do you have a visitor’s book or way of recording your visitor’s names and addresses? ______ yes ______ no

2. If so, how many local visitors signed your visitor’s book last year?

3. Do you contact visitors who have signed your book?

4. How many new members joined last year?

Programs and Participation:

1. Number of worship services your congregation has each month

2. Average attendance at Sunday worship services

3. Number of adults who participate in education or other programs

List the leading programs (other than worship) that you offer within your congregation to promote community and/or personal and spiritual growth:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

List the programs that you congregation currently provides as community service, social action or social advocacy within your community:
PART III. CONGREGATIONAL SELF-ASSESSMENT
Section 1 - This profile gathers basic data about the congregation. One person on the Leadership Team can take responsibility for completing this profile.

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<th>To a Small Extent</th>
<th>To a Moderate extent</th>
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<tbody>
<tr>
<td>1</td>
<td>Our congregation attracts young adult (18-35 year old) newcomers.</td>
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<td>2</td>
<td>Members are encouraged to invite others to visit the congregation.</td>
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<td>3</td>
<td>Members feel comfortable talking about their Unitarian Universalist faith with others outside of the congregation.</td>
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<td>4</td>
<td>Members have opportunities to develop their UU faith and its meaning for them within the congregation.</td>
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<td>5</td>
<td>Participants in our congregation are encouraged to be involved in its mission and ministry.</td>
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<td>6</td>
<td>People with leadership roles are given support, encouragement and resources.</td>
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<td>7</td>
<td>We have a core group of young adults to build upon for programming focused for this group within our congregation.</td>
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<td>8</td>
<td>Our worship space is beautiful, maintained and large enough to accommodate our congregation.</td>
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<td>9</td>
<td>Our congregation inspires generosity and raises enough money to pay fair compensation and support programs</td>
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</table>
Our congregation values our ministry to its children and families through religious education, and other programs and activities. Our congregation listens to the experiences of young adults. Our congregation is open to new initiatives for ways of doing things. Our congregation has a sense of direction for the future. A sense of belonging is nurtured and widespread within our congregation among various kinds of people. Our congregation is visible and well-known in its community. We are strong in our ability to integrate new members into the congregation. The mission priorities of our congregation are clear and can be described by many members. We support and encourage members in their contacts and involvement within the community around us. The religious education and fellowship paces are adequate and well kept. Our congregation handles capital financial needs well through fundraising, endowment and or deferred giving. Our worship inspires and supports the spiritual growth of our congregation. Training and/or support is available to members to help them to share their faith and to witness to their faith values. Our congregation has regularly studied the needs of the community around our congregation as a basis for planning. Our congregation has grown in membership over the last five years. Each year, we attract a number of newcomers equal to at least 10% of our membership. Attendance at worship services has increased over the last five years.
Young adults feel positive about the worship style of our congregation.

We attract new participants to our congregation on a regular basis.

Members of our congregation value youth ministry.

We have persons in our congregation who provide welcome and follow up to visitors and newcomers.

Our infrastructure (roof, offices, computer, kitchen, parking, etc.) is adequate and fully accessible.

Our congregation raises substantial funds for outreach to good projects and causes it supports.

Our worship provides the challenge and inspiration we need to live out our faith in the world.

Members are encouraged to use their gifts and skills.

Training and support is available to members in their leadership roles.

We have assessed our congregation’s progress toward becoming an anti-racist and multi-cultural congregation.

We are well along in a specific strategic plan for our congregation’s growth and institutional development.

We have made progress on a specific plan toward paying fair compensation to all our employees.

Expectations and roles of paid professionals and volunteer leaders are clear and well-understood.

SECTION 2: TEAM SCORING OF CONGREGATIONAL SELF-ASSESSMENT

Instructions: Put individual scores for each item on the table below. If team member 2 gave statement 1 a score of “4 – To a great extent”, enter “4” in appropriate box. After all the scores have been entered, tally the average score for each of the statements by adding the sum for each statement and dividing by the total number of respondents. If you are doing a congregational tally, then do an average score of all responses.
<table>
<thead>
<tr>
<th>Team member:</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
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<tr>
<td>Statement #</td>
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AVERAGE SCORE OF STATEMENT:
Add items across; divide by # of respondents
Divide sum by the number of respondents
SECTION 3: INTERPRETATION OF SCORES

Instructions: For each of the items below, put your team (or congregation) average rating for each statement and shade in the range of responses from the team or congregation as in the sample below.

1  2  3  4  5

Statement #:

Each year, we attract a number of newcomers
25 equal to at least 10% of our membership. x

We attract new participants to our congregation
28 on a regular basis x

In this example, there is a wide spread of responses (from “1” to “4”) represented with the consensus (or average score) toward the lower end of the range (or a score of “2”). Whereas, in Question 28, there is a narrower range of responses (from “4” to “5”), with the consensus represented by the average score of “4”.

The areas of congregational life used in this assessment are derived from various resources and research on growing and vital congregations (including Peter Kaldor, Shaping a Future: Characteristics of Vital Congregations, 1991).

ATTRACTION OF NEW MEMBERS

I. LEVELS OF NEWCOMERS: the ability to attract newcomers (e.g., the relative % of people who were not members five years ago.)

To no extent To a Small Extent To a Moderate extent To a Great extent To a Very great extent

Each year, we attract a number of newcomers
25 equal to at least 10% of our membership.

We attract new participants to our congregation
28 on a regular basis.

We have persons in our congregation who provide welcome and follow up to visitors and newcomers.

II. NUMERICAL GROWTH: The growth rate of church attendance at the congregation over the last five years. Note “attendance” is NOT the number of people in membership.

To a Small Moderate great very great

To no extent Extent extent extent great
Our congregation has grown in membership over the last five years.

Attendance at worship services has increased over the last five years.

We are well along in a specific strategic plan for our congregation’s growth and institutional development.

COMMUNITY BUILDING

I. YOUNG ADULT MINISTRY AND INVOLVEMENT: the ability to retain young adults as active members of a Unitarian Universalist congregation or young adult ministry of the congregation (e.g., young adult group, campus ministry, etc.)

Our congregation attracts young adult (18-35 year old) newcomers.

We have a core group of young adults to build upon for programming focused for this group within our congregation.

Our congregation listens to the experiences of young adults.

II. SENSE OF BELONGING IN THE CONGREGATION: Members and participants feel a strong and growing sense of belonging to their congregation

Participants in our congregation are encouraged to be involved in its mission and ministry.

A sense of belonging is nurtured and widespread within our congregation among various kinds of people.

We are strong in our ability to integrate new members into the congregation.
OUTWARDLY FOCUSED

I. COMMUNITY INVOLVEMENT: The involvement of members in community activities both within and outside the church. This includes service, social action, etc.

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Our congregation is visible and well-known in its community.

15 We support and encourage members in their contacts and involvement within the community around us.

18 Our congregation has regularly studied the needs of the community around our congregation as a basis for planning.

II. SHARING FAITH AND INVITING OTHERS: The willingness of members to discuss their faith with others and invite others to congregation activities

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Members are encouraged to invite others to visit the congregation.

2 Members feel comfortable talking about their Unitarian Universalist faith with others outside of the congregation.

3 Training and/or support is available to members to help them to share their faith and to witness to their faith values.

ONGOING EXPLORATION OF FAITH

I. LIFESPAN RELIGIOUS GROWTH: Faith development of people of all ages is valued in the life of the congregation.

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Members have opportunities to develop their UU faith and its meaning for them **within** the congregation.

Our congregation values our ministry to its children and families through religious education, and other programs and activities. Members of our congregation value youth ministry.

II. WORSHIP: Worship content and style that inspires and challenges members and visitors, old and young alike.

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<td>Our worship inspires and supports the spiritual growth of our congregation.</td>
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<td>Young adults feel positive about the worship style of our congregation.</td>
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<td>Our worship provides the challenge and inspiration we need to live out our faith in the world.</td>
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**MISSION FOCUSED LEADERSHIP**

I. SENSE OF DIRECTION: A clear sense of mission and purpose, with a plan for next steps.

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<td>Our congregation is open to new initiatives for ways of doing things.</td>
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<td>Our congregation has a sense of direction for the future.</td>
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<td>The mission priorities of our congregation are clear and can be described by many members.</td>
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II. LEADERSHIP SUPPORT AND TRAINING: Volunteers are given what they need to do their jobs.
People with leadership roles are given support, encouragement and resources. Members are encouraged to use their gifts and skills. Training and support is available to members in their leadership roles.

III. CLARITY OF EXPECTATIONS AND ASSESSMENT: Leadership roles, fair compensation, and transformational processes are clear. We have assessed our congregation’s progress toward becoming an anti-racist and multi-cultural congregation. We have made progress on a specific plan toward paying fair compensation to all our employees. Expectations and roles of paid professionals and volunteer leaders are clear and well-understood.

RESOURCES

I. STEWARDSHIP: The congregation elicits generosity with time, money.

Our congregation inspires generosity and raises enough money to pay fair compensation and support programs. Our congregation handles capital financial needs well through fundraising, endowment and or deferred giving. Our congregation raises substantial funds for outreach to good projects and causes it...
II. FACILITIES: Adequate space, parking, and infrastructure for present programs and for growth.

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- Our worship space is beautiful, maintained and large enough to accommodate our congregation.
- The religious education and fellowship paces are adequate and well kept.
- Our infrastructure (roof, offices, computer, kitchen, parking, etc.) is adequate and fully accessible.

SECTION 4: SUMMARY OF OUR CONGREGATIONAL SELF-ASSESSMENT:
After reviewing the results of “Section 3: The Interpretation of Scores”, reflect as a group on your responses to the following statements and compose a summary of your congregational self-assessment here.

A. Our congregation’s perceived strengths are:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

B. Our congregation’s perceived potential strengths are:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

C. Our perceived challenges are:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
IV. RECOMMENDATIONS FOR ACTION

This is a part of the Comprehensive Congregational Self Assessment is the analysis and recommendations that come from the Part III. You may want to do as a Leadership Team or you may want to delegate to appropriate task forces within your congregation. You may also want to work with a consultant from your district or from the continental UUA staff to help you develop a plan for improving some of the particular areas of congregational life.

The intent of this portion is to carry your assessment further by recommending some actions to take (a) to “tweak” or build on current strengths you have in this area OR (b) to significantly change your current practices OR (c) to remove barriers to your progress in this area (i.e., stop doing something).

<table>
<thead>
<tr>
<th>RECOMMENDED ACTIONS:</th>
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<tr>
<td>To “Tweak” or build upon current strengths you have in this area</td>
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LEVELS OF NEWCOMERS: the ability to attract newcomers (e.g., the relative % of people who were not members five years ago.)

YOUNG ADULT RETENTION: the ability to retain young adults as active members of a Unitarian Universalist congregation or young adult ministry of the congregation (e.g., young adult group, campus ministry, etc.)

NUMERICAL GROWTH: The growth rate of church attendance at the congregation over the last five years. Note “attendance” is different than the number of people in membership.
SENSE OF BELONGING IN THE CONGREGATION: Members and participants feel a strong sense of belonging to their congregation.

COMMUNITY INVOLVEMENT: The involvement of members in community activities both within and outside the church. This includes involvement in community services, social action, etc.

SHARING FAITH AND INVITING OTHERS: The willingness of members to discuss their faith with others and invite others to congregation activities.

GROWING IN FAITH: Faith development of people of all ages is valued in the life of the congregation.

SENSE OF DIRECTION: A clear sense of mission and purpose, with a plan for next steps.

WORSHIP: Music, message, and more – inspiring members and visitors, old and young alike.

LEADERSHIP SUPPORT AND TRAINING: Volunteers are given what they need to do their jobs.

STEWARDSHIP: The congregation elicits generosity with time, money.
FACILITIES: Adequate space, parking, and infrastructure for present programs, accessibility and for growth.

CLARITY OF EXPECTATIONS AND ROLES: Leadership roles, fair compensation, and transformational processes are clear.
V. YOUR CONGREGATION’S RELATIONSHIP TO THE COMMUNITY

Obtaining a perspective of your congregation from the “outside-in” can be helpful as you are assessing the effectiveness of your congregation as a religious presence and resource for justice making within your surrounding community. The information from the activities listed below can often provide insights for building on your congregation’s current strengths in relating to your surrounding community.

Moreover, many congregations have found it helpful to know how they are perceived in the community. The surrounding community’s perception (1) may impact a congregation’s capacity to attract newcomers and/or (2) may influence the frequency that the community calls upon the congregation as a resource for social justice or community service.

Instructions for the Community Interview Team:

Step one: The team completes “Step I: Reflections On Our Relationship with Our Community”. This is an exercise to help the team form their own impressions of the congregation’s relationship with the community.

Step two: From the “Reflections” in step one, the team may decide to add new questions or revisions to the Sample Interview Questions (Part II).

Step three: Develop a list of community leaders who you feel it would be important to talk with and interview. Review the list of sample questions below and adapt them as you feel you need to.

Step four: At least three members of your congregation agree to interview at least 5 people on the list from Step Three.

Step five: This interview team gathers to summarize their interviews in a final report. Reflect on this summary in order to discern key insights and recommendations for how to improve your congregation’s relationship with its surrounding community.

STEP I: REFLECTIONS ON OUR RELATIONSHIP WITH OUR COMMUNITY

Questions for Study Team:

1. What role does your congregation play in the place that it is located?
2. What kind of reputation does your congregation have in your community?
3. What is the relationship between your congregation and the other congregations in the community?
4. What ministries, programs, events and activities in the community receive the support of your church?
5. What community leadership roles are filled by active members of your congregation?
6. How does the community relate to your congregation? Embraces, holds at a distance, rejects?

STEP II: COMMUNITY LEADERS QUESTIONNAIRE (SAMPLE QUESTIONS):

Introduce yourself and tell the interviewee of the purpose of your interview.

1. What major changes do you see occurring in our community? What do you think is causing these changes?
2. Talk about this community’s strengths and weaknesses.
3. What organizations (agencies, congregations, etc.) do you know of that are doing an especially good in doing something about these problems and/or contributing to the community?
4. What do you know about [name of congregation]?
5. Do you have any thoughts on what our congregation do to make a better contribution to the community?
6. What do you think are the major problems or trends in the community that may impact us in the next 5 to 10 years?