

Report of Results of 2015 Congregational Survey – Unity Church Unitarian

August 2015

Outline

- Sample characteristics
- Descriptive Results – Ends Statements
 - Evaluation of Ends Statements
 - Loyal/At-Risk Profile
 - What do comments tell us?
- Descriptive Results - Spiritual Maturity
 - Evaluation of 44 individual items
 - Overall SM
 - Evaluation of Underlying Dimensions of SM
 - Drivers of SM
 - What do comments tell us?
- Prescriptive Results – Spiritual Maturity – Tactical/Strategic Implications
 - Quadrant Map
 - Signature Strengths and Key Opportunities
 - Exploring the Difference Between Spiritual Maturity Categories
- Evaluation of Programs and Activities

Congregational Survey Structure

1. Spiritual Maturity – Focus is on “us as individuals”

Part 1a: evaluation of 44 items related to Spiritual Maturity (SM). For example: *I care deeply about the welfare of others; I seek opportunities to learn and grow; I believe my life has meaning and purpose*

- Note: Items have evolved over several years and owe much to Rob and Janne, Kendall Gibbons (formerly minister at First Unitarian Society), and UCU ministerial interns.

Part 1b: a self-defined, self-reported evaluation of current level of SM and the level of SM five years from now

2. Ends Statements/Loyalty – Focus is on UCU

Part 2a: evaluation of performance on 15 current Ends Statements

Part 2b: loyal/at-risk evaluation –“Would you recommend UCU to a friend or relative”

3. Program/Activities

Part 3: evaluation of impact on SM of UCU programs and activities

4. Demographic information

Summary of Key Findings

Descriptive Results

- In terms of Ends (see slides 8 - 12)

There is significant improvement on three Ends over what was measured in 2014. All are Beyond Ends:

- *b4 Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment*
- *b3 Live out our commitment to racial reconciliation and to dismantling racism*
- *b2 Build authentic relationships with people across differences, in the spirit of humility and reverence*

End *b5, Participating actively in the larger Unitarian Universalist community*, continues to be the biggest challenge.

As is typically true at the macro level, we find that there are higher scores for the Within Ends than for the Among Ends and higher scores for the Among Ends than for the Beyond Ends (W/I > A > B).

If we look at Ends by Family Type (families of color or white) we see that evaluations tend to be lower for families of color especially for *a1 Sustain and encourage one another in love*, *a4 Foster a culture of open, inclusive leadership and meaningful engagement*, and *b1 Open our doors and our hearts to those who seek comfort, courage, and meaning*.

- In terms of Loyalty (see slide 13)

Net Loyalty (% Loyal - % At-Risk) continues to bounce around at about 65% plus or minus a point or two. The downward trend in At-Risk percent continues.

Summary of Key Findings (con't)

Descriptive Results (con't)

- When we bundle the 44 individual Spiritual Maturity items into the “underlying dimensions of spiritual maturity” (see slides 15 – 20) we see higher scores on the dimensions of
 - *Pursues understanding and growth*
 - *Cares for others*
 - *Connects to a sense of wonder*
 - *Opens themselves to a wider connection they're unable to control*
 - *Develops their self-awareness*and lower scores on the dimension of
 - *Actively develops and integrates spirituality in their life*We see little change in performance on the underlying dimensions between 2014 from 2015.
- In terms of Program/Activity Evaluation (see slide 33)
Music, Worship and Meditation, Pilgrimage, Pastoral Care, and Children's RE are the top five in terms of impact on SM. Since this is a different format in 2015 comparisons are not directly made, but these results seem consistent with what we have seen in the past.

Summary of Key Findings (con't)

Prescriptive Results

- In terms of Signature Strengths and Key Opportunities (see slides 23 - 25) we have the top five in each category as follows (see Quadrant Map –slide 26 - for more details):

Signature Strengths (relatively high performance; relatively high importance)

6 *Leading a moral life makes me happy.*

41 *I can give loyalty to another's leadership without losing my integrity.*

20 *I am self-aware.*

43 *I believe my life has meaning and purpose.*

9 *I seek harmony with others.*

Key Opportunities (relatively lower performance; relatively high importance)

42 *I act in a religious manner.*

8 *I actively practice my spiritual or religious faith.*

11 *I act in a spiritual manner.*

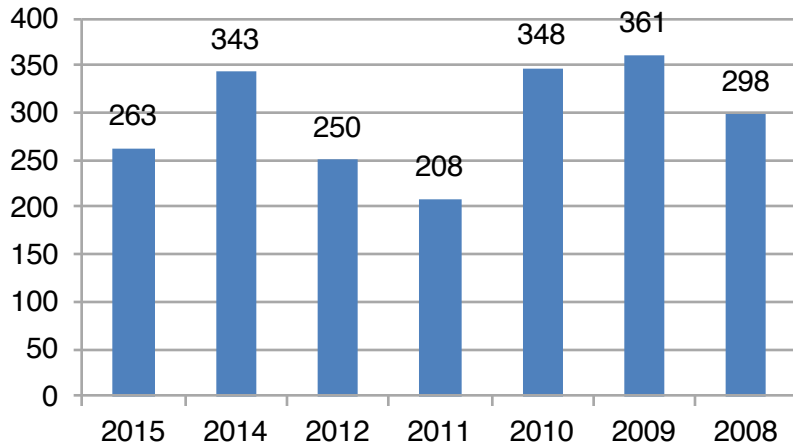
7 *I have a clear purpose to my life and am able to articulate that purpose to both myself and others.*

26 *Having good boundaries allows me to act with intention.*

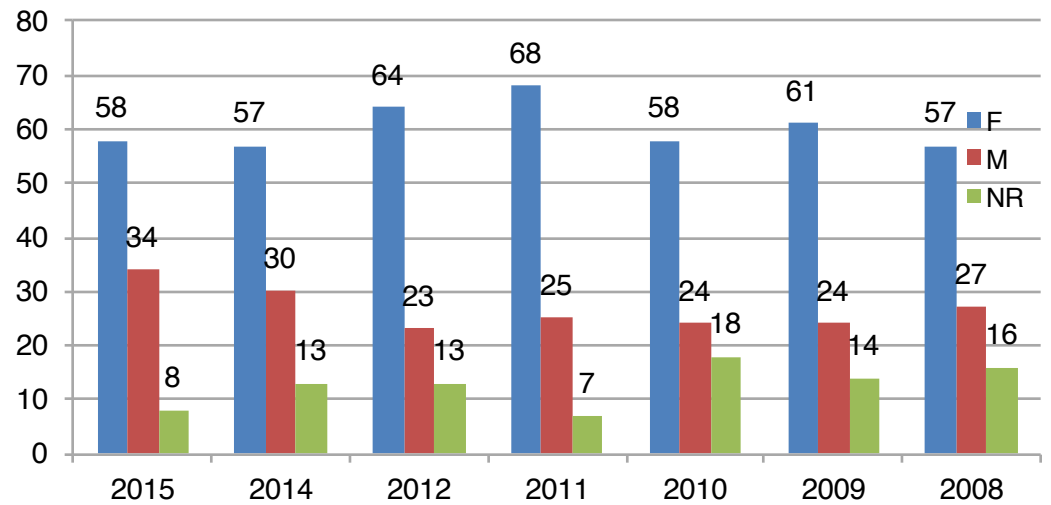
It might be of interest to observe that a SS is (43) “*I believe my life has meaning and purpose*” and that a KO is (7) “*I have a clear purpose to my life and am able to articulate that purpose to both myself and others*”. So a question to ask is how can we help people articulate the purpose (and meaning) they inherently know their lives have?

Sample Characteristics 2008 - 2015

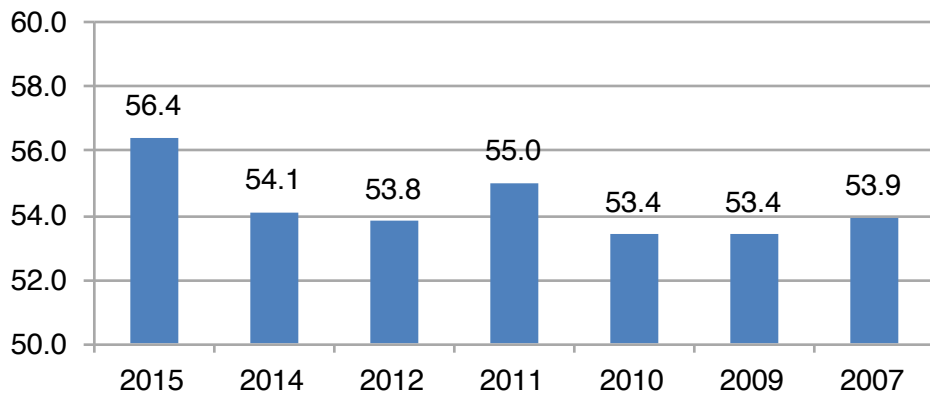
responses



gender



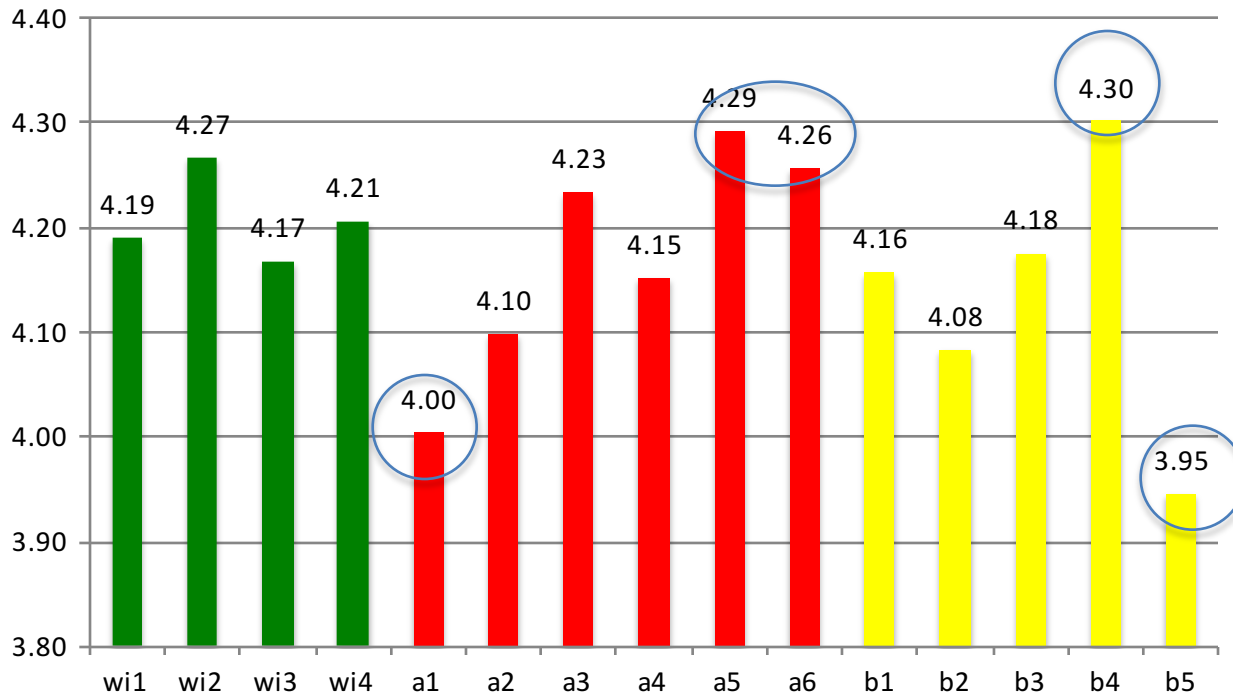
age



- Number of responses typical of last several years (last year – 2014 - a pleasant exception)
- More men than in previous years
- Age a little older than in previous years, but basically 55 +/- 1.5

Evaluation of Ends Statements – Averages

Average Performance on Ends - 2015



- Relatively little variation among Within Ends.
- Highest and lowest Ends are Beyond Ends: b4 and b5, respectively.
- Ave for all Ends are in positive territory (≥ 4.0), except b5.

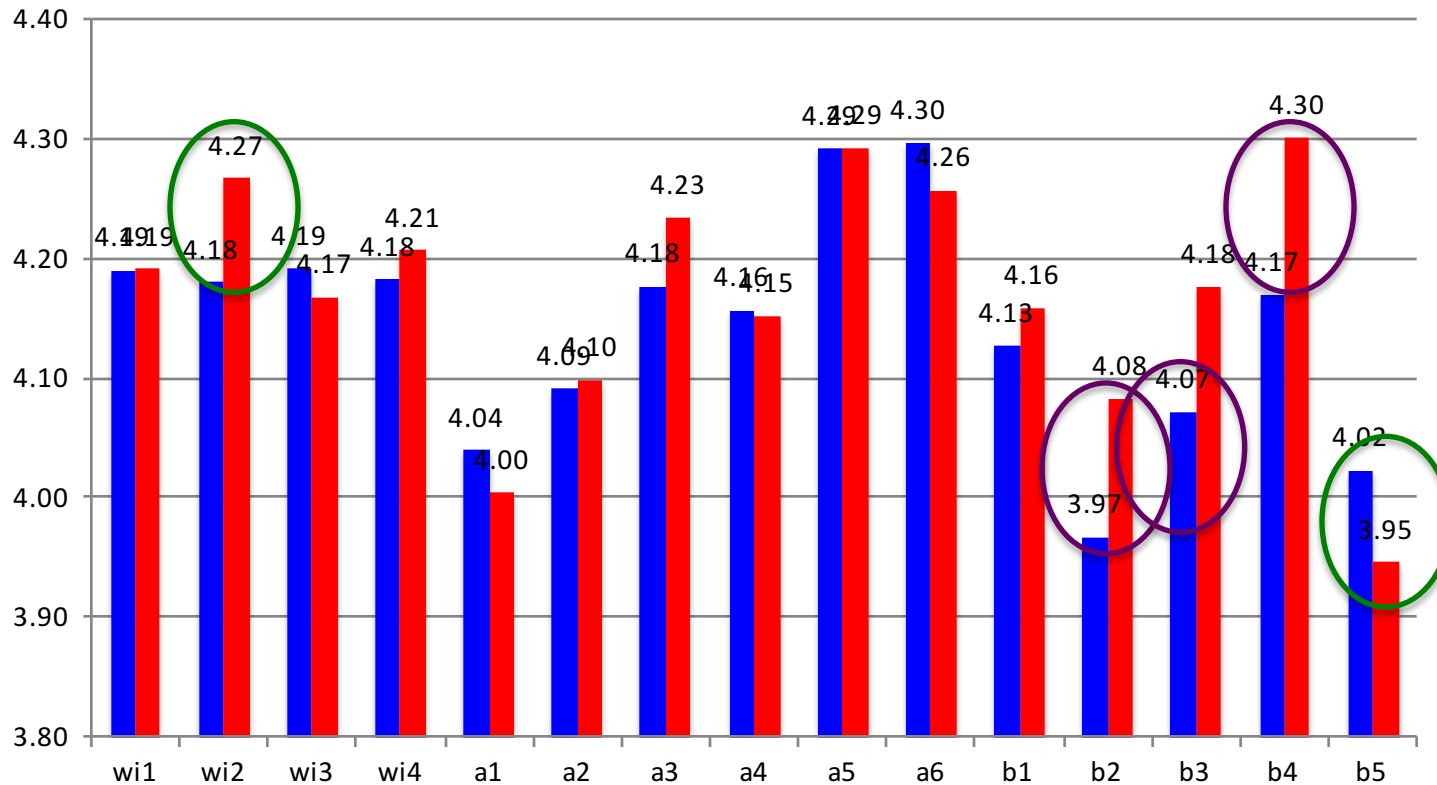
wi = within
a = among
b = beyond

- b4 Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
b5 Participate actively in the larger Unitarian Universalist community
- a5 Are generous with our time, talents, resources and creativity
a6 Are careful stewards of our resources and facilities
a1 Sustain and encourage one another in love

differences ≥ 0.12 are statistically sig at the 95% level of confidence

Tracking Ends Performance 2014 - 15

Ave Performance - Ends 2014/2015



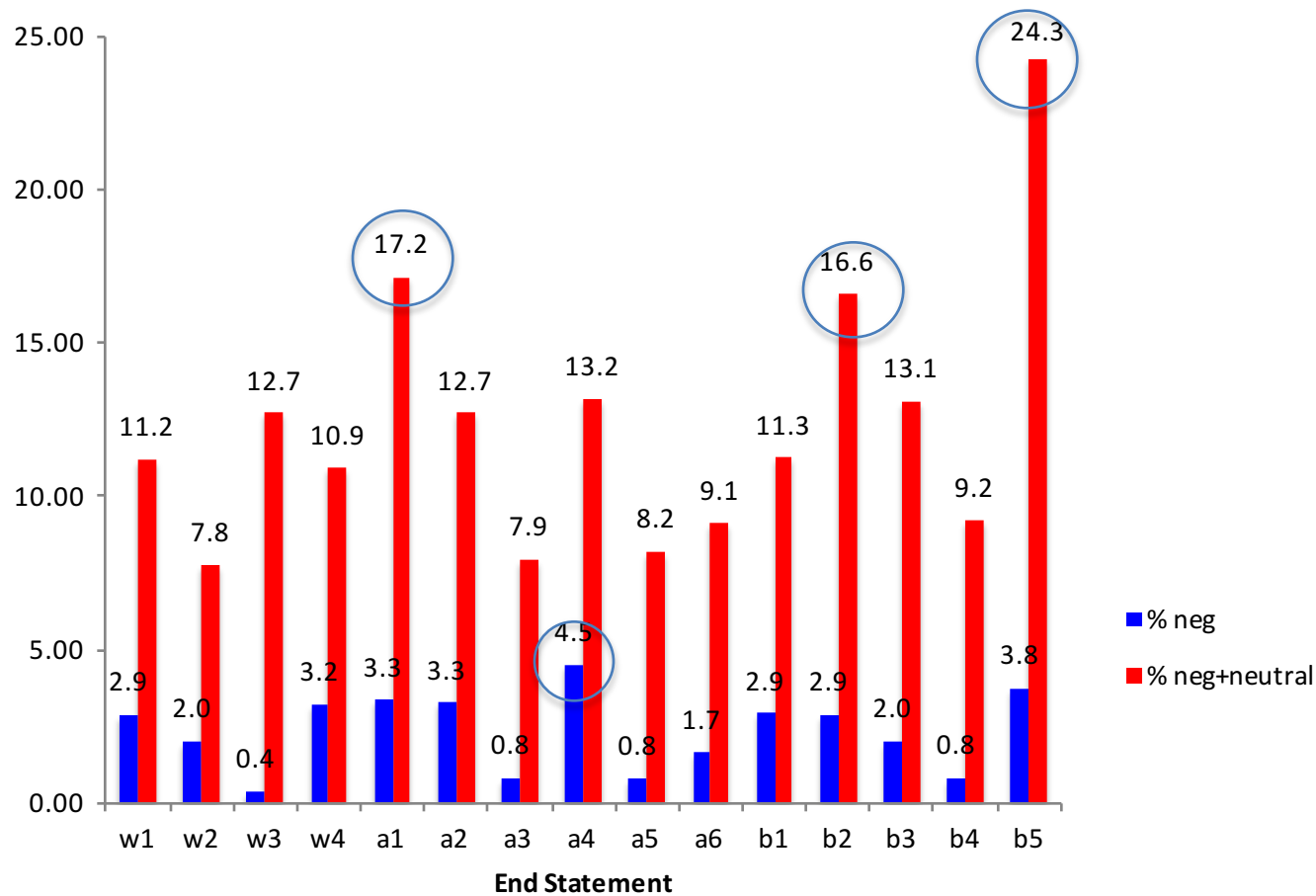
'14-'15 differences of 0.11 are significant at the 95% level of confidence
 '14-'15 differences of 0.07 are significant at the 80% level of confidence

■ 2014
 ■ 2015

- b4 Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
- b3 Live Live out our commitment to racial reconciliation and to dismantling racism
- b2 Build authentic relationships with people across differences, in the spirit of humility and reverence
- b5 Participate actively in the larger Unitarian Universalist community
- w/i2 Develop spiritual practices that nurture reverence and encourage diverse worship services rich in beauty, serenity, community, and joy.

For most of us, negative perceptions have greater psychological impact than positive perceptions, so let's look at the negative (and neutral) perceptions...

Percentage of Neutral or Negative Evaluation of Ends Statements 2015



- Three Ends with highest “% neutral or negative” are Beyond Ends: b2 and b5 and Among End a1. These three Ends also have the lowest average scores.
- The End with highest negative percent is Among End a4.

b2 Build authentic relationships with people across differences, in the spirit of humility and reverence

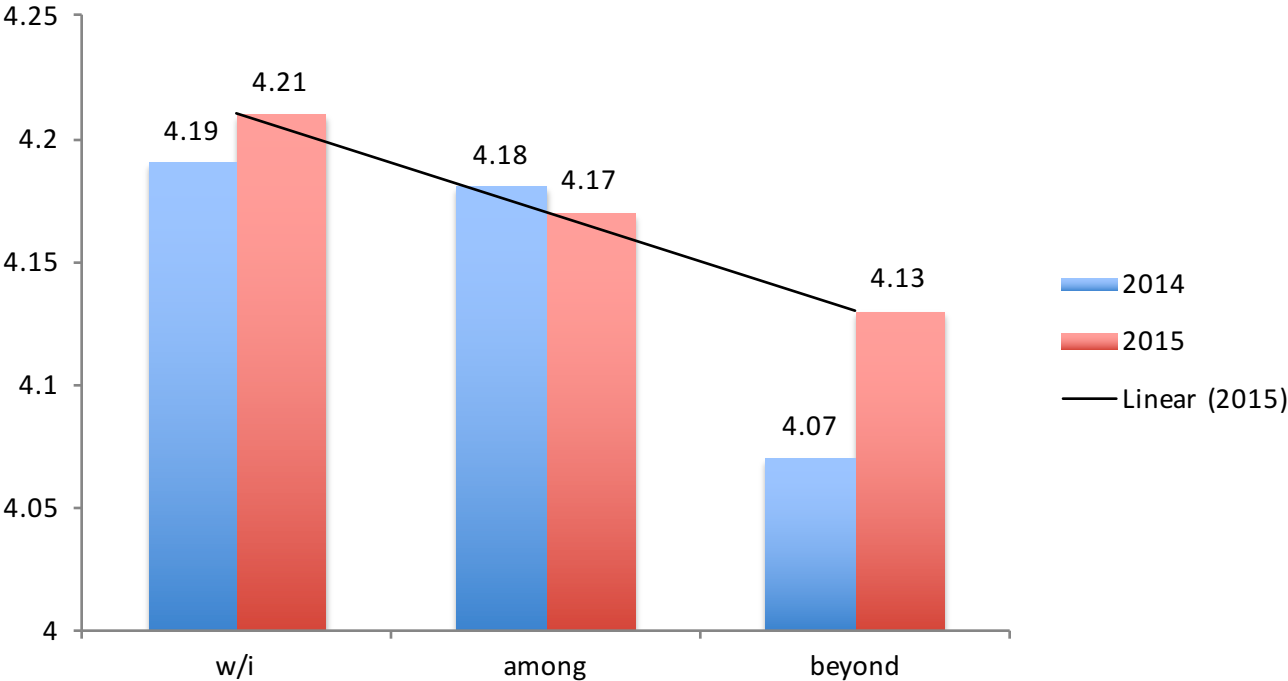
b5 Participate actively in the larger Unitarian Universalist community.

a1 Sustain and encourage one another in love.

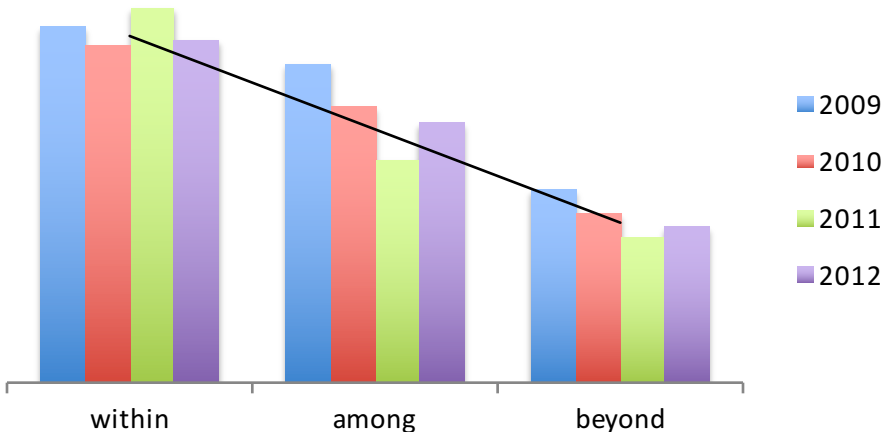
a4 Foster a culture of open, inclusive leadership and meaningful engagement.

Macro Scores: Averaging Across Individual Within, Among, and Beyond Ends

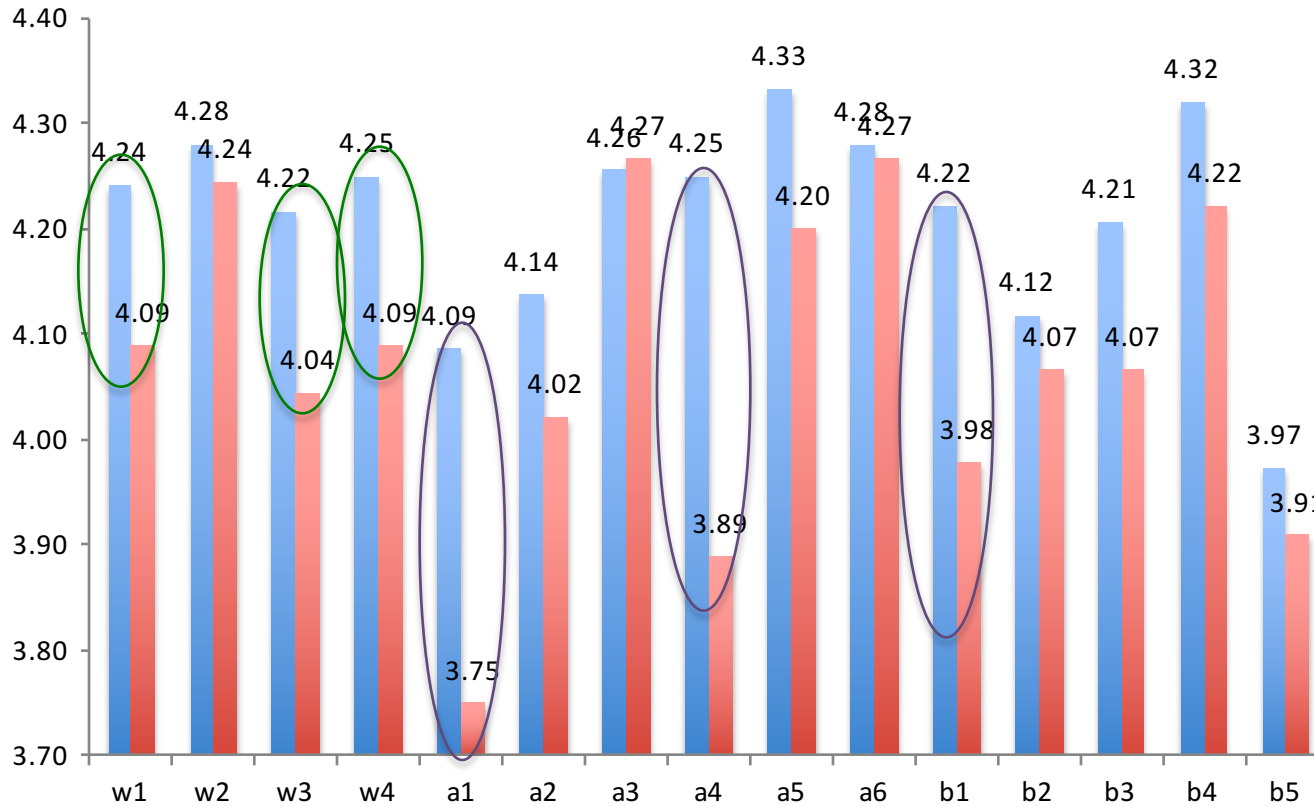
Macro Averages



As has been true in previous years, the pattern of Within > Among > Beyond continues.



Evaluation of Ends Statements by Family Type (family of color/white)



Evaluations tend to be lower for families of color especially for Ends a1, a4, and b1.

differences of 0.24 are significant at the 95% level of confidence
differences of 0.16 are significant at the 80% level of confidence

Percent family of color = 19%
 Percent white family = 81%

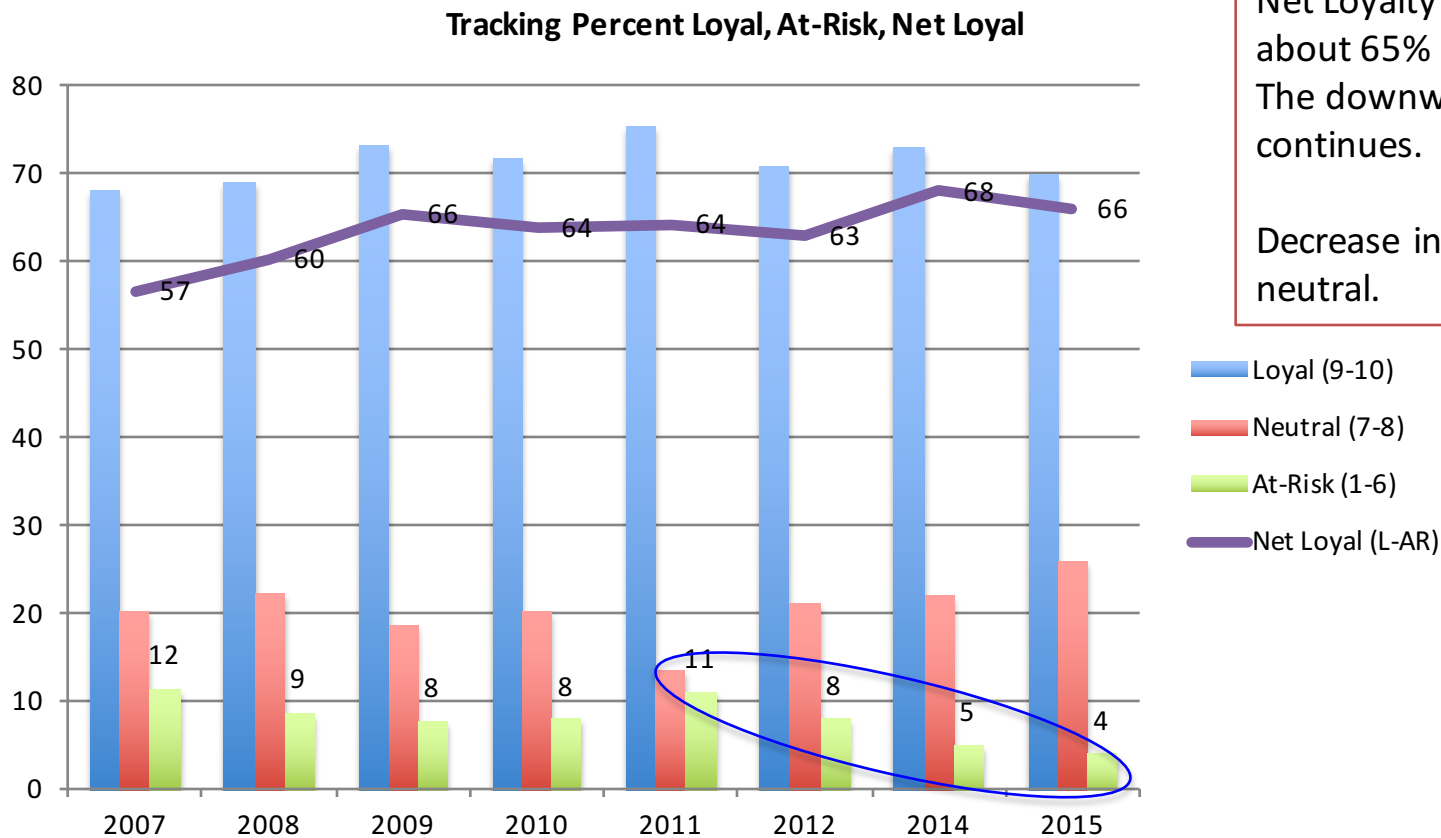
- a1 Sustain and encourage one another in love.
- a4 Foster a culture of open, inclusive leadership and meaningful engagement.
- b1 Open our doors and our hearts to those who seek comfort, courage, and meaning.
- w1 Open ourselves to compassionate pastoral care in times of joy, sorrow, and transitions.
- w3 Embrace our identity as Unitarian Universalists and live out the principles of our shared faith in our daily lives.
- w4 Cultivate a spirit of curiosity and welcome, growing from a desire for authentic relationship.

	Do you have children living at home?			
	None	Age 6 or under	Age 7-12	Age 13-18
families of color	62.2	8.9	20.0	22.2
white families	67.3	12.2	15.3	13.8

Families of color a little more likely to have children at home, especially older ones.

Loyalty: Respondents are asked, “*Would you recommend UC to a friend or relative?*”*

Willingness to recommend is viewed in the business world as a key indicator of degree of loyalty to a brand or company.



Net Loyalty continues to bounce around at about 65% plus or minus a point or two. The downward trend in At-Risk percent continues.

Decrease in At-Risk percent transitioning neutral.

*10 point scale: 1-6 = At-Risk; 7-8 = Neutral; 9-10 = Loyal
Net Loyalty = %Loyal - %At-Risk

What Do Comments Tell Us?

- Almost every year we have comments telling us that we have work to do to “draw the circle wide, draw it wider still” so that more people feel welcome and find their way into our community. These included:
 - Four comments that the church needs to be more welcoming to single parent families and people struggling financially or emotionally.
 - Three requests for non-gender-specific book clubs.
 - Six comments about wanting more warmth from and connection to the church community. An equal number of comments from people who found that warmth and connection here.
- Four comments urging less focus on social justice and community outreach. An equal number of comments praising Unity’s community outreach work and how much it’s meant to the individual.
- Many comments of gratitude.

A Look at the Spiritual Maturity Items

- There are 44 of these items. They focus on “us as individuals” - attitudes, opinions, behaviors that relate to our spiritual life - and include items like:
 - *I care deeply about the welfare of others*
 - *I seek opportunities to learn and grow*
 - *I believe my life has meaning and purpose*
- We believe these items are in the class of items NYT columnist David Brooks refers to as eulogy virtues (in contrast resume virtues – see his column “The Moral Bucket List”, NYT April 15, 2015 or his latest book The Road to Character).

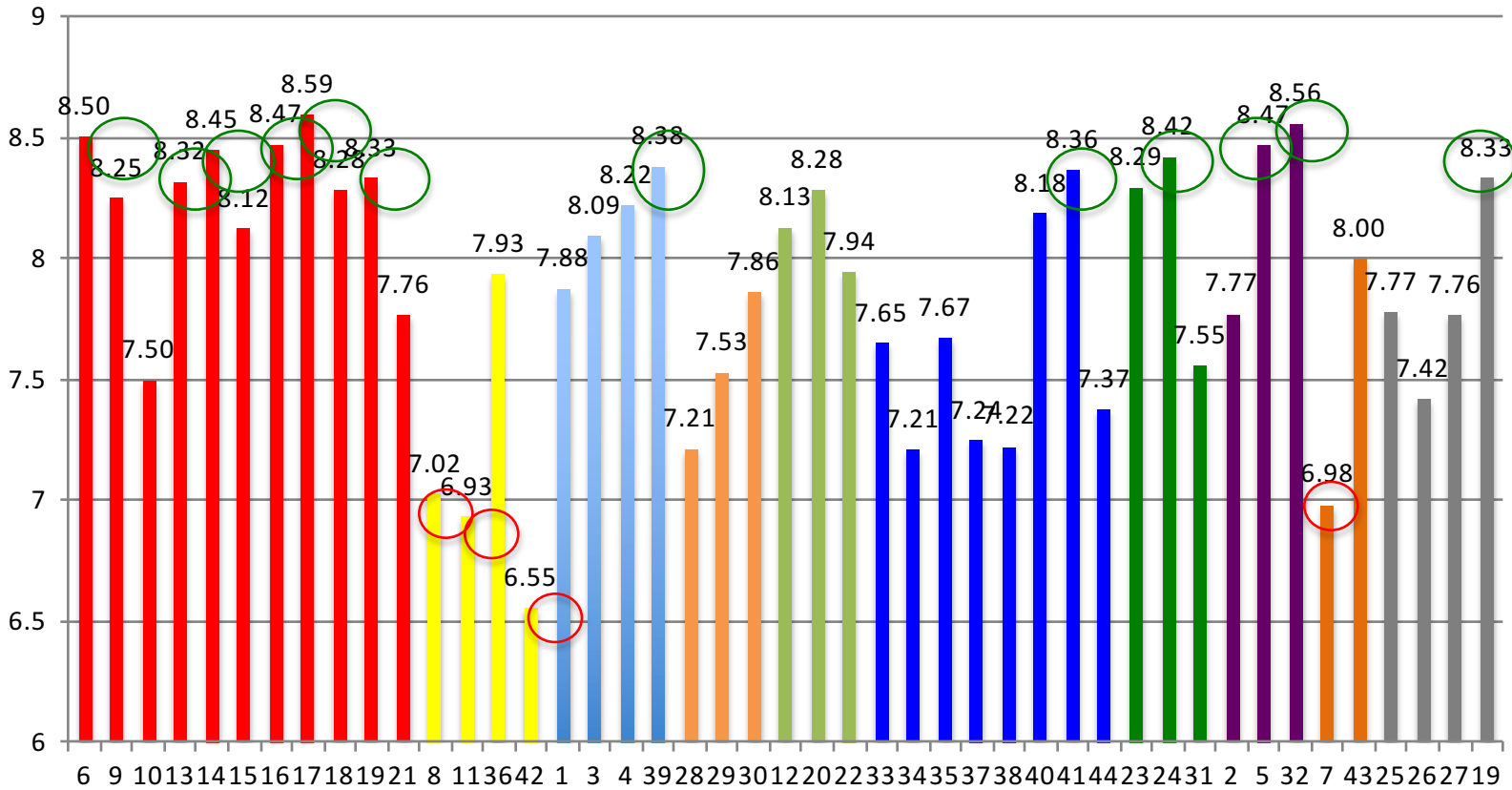
“The résumé virtues are the skills you bring to the marketplace. The eulogy virtues are the ones that are talked about at your funeral — whether you were kind, brave, honest or faithful. Were you capable of deep love?”

We all know that the eulogy virtues are more important than the résumé ones. But our culture and our educational systems spend more time teaching the skills and strategies you need for career success than the qualities you need to radiate that sort of inner light. Many of us are clearer on how to build an external career than on how to build inner character.

But if you live for external achievement, years pass and the deepest parts of you go unexplored and unstructured. You lack a moral vocabulary. It is easy to slip into a self-satisfied moral mediocrity. You grade yourself on a forgiving curve. You figure as long as you are not obviously hurting anybody and people seem to like you, you must be O.K. But you live with an unconscious boredom, separated from the deepest meaning of life and the highest moral joys. Gradually, a humiliating gap opens between your actual self and your desired self, between you and those incandescent souls you sometimes meet.”

Descriptive Results – Average Scores on 44 SM Items Arranged by 10 Underlying Dimensions of SM – Complete Description of 44 Items is in Appendix A

Scores on 44 SM Items - 2015



differences
 ≥ 0.29 are
 statistically
 sig at the 95%
 level of confidence

Highest scores on
 32 I am curious to learn more about how the world around me works.
 5 I seek opportunities to learn and grow.
 24 I accept ambiguity as inherent in life.
 17 I believe it matters what I do.
 16 I care deeply about the welfare of others.
 14 I take responsibility for the consequences of my actions, even those that are unintended.

Lowest scores on
 42 I act in a religious manner.
 11 I act in a spiritual manner.
 8 I actively practice my spiritual or religious faith.
 7 I have a clear purpose to my life and am able to articulate that purpose to both myself and others.

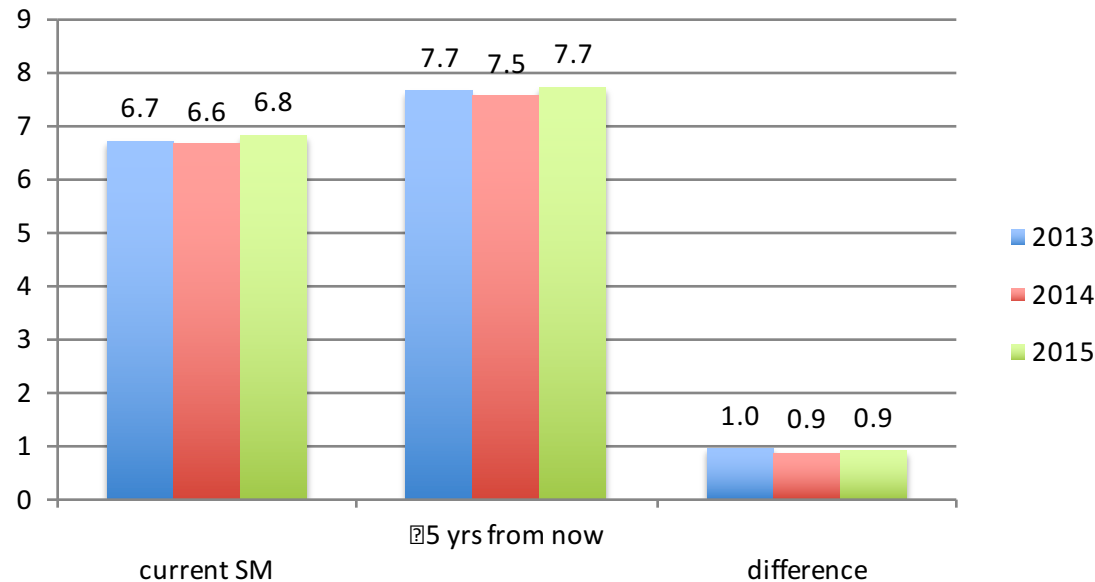
1. Cares for others
2. Actively develops and integrates spirituality in their life
3. Connects to a sense of wonder
4. Thinks symbolically or metaphorically
5. Develops their self-awareness
6. A wise decision maker who can deal w/ a variety of situations and outcomes
7. Opens themselves to a wider connection they're unable to control
8. Pursues understanding and growth
9. Develops dedication to purpose
10. Develops clear boundaries to inform intentional action

Spiritual Maturity Results – Overall SM

After respondents have evaluated 44 individual items, they are asked,

“Taking the items above as speaking, in aggregate, to your overall level of spiritual maturity, plus any other items we may have missed, and recognizing that some item will be more important to you than others: How would you rate your current level of overall spiritual maturity? 1 = lowest level; 10 = highest level.”

Tracking Overall Measure of SM



Year-over-year differences are minimal.

Underlying Dimensions of SM

SM part of survey contains 44 items. A certain amount of redundancy exists among these items. For example items like

I seek harmony with others

I give to others fully and generously

I care deeply about the welfare of others

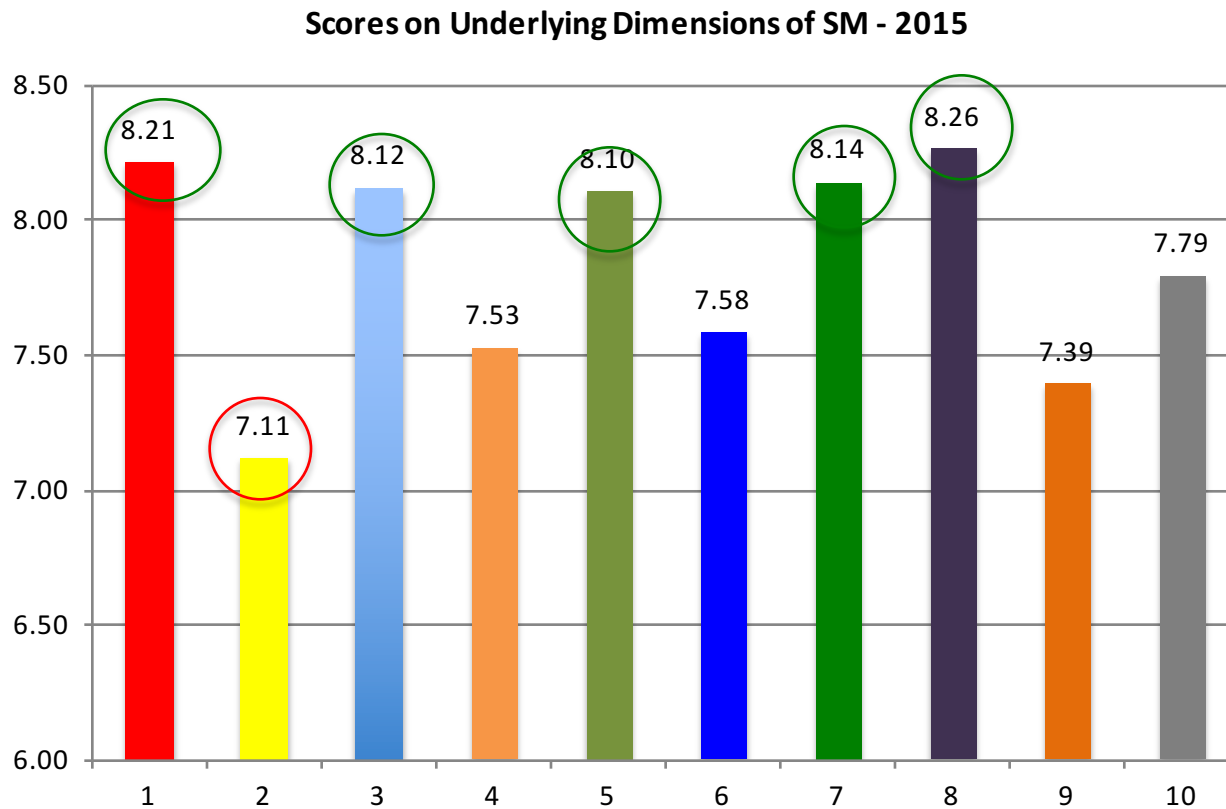
would seem to be related and perhaps measuring the same underlying construct. A statistical procedure called factor analysis can be used to uncover these underlying constructs.

When applied to our original 56 items, 10 underlying dimensions emerged. We refer to these dimensions as the Underlying Dimensions of SM.

Underlying Dimensions:

- 1. Cares for others**
- 2. Actively develops and integrates spirituality in their life**
- 3. Connects to a sense of wonder**
- 4. Thinks symbolically or metaphorically**
- 5. Develops their self-awareness**
- 6. A wise decision maker who can deal w/ a variety of situations and outcomes**
- 7. Opens themselves to a wider connection they're unable to control**
- 8. Pursues understanding and growth**
- 9. Develops dedication to purpose**
- 10. Develops clear boundaries to inform intentional action**

Descriptive Results – Macro Level - Evaluation on 10 Underlying Dimensions of SM



Larger scores for:

- 8 Pursues understanding and growth
- 1 Cares for others
- 3 Connects to a sense of wonder
- 7 Opens themselves to a wider connection they're unable to control
- 5 Develops their self-awareness

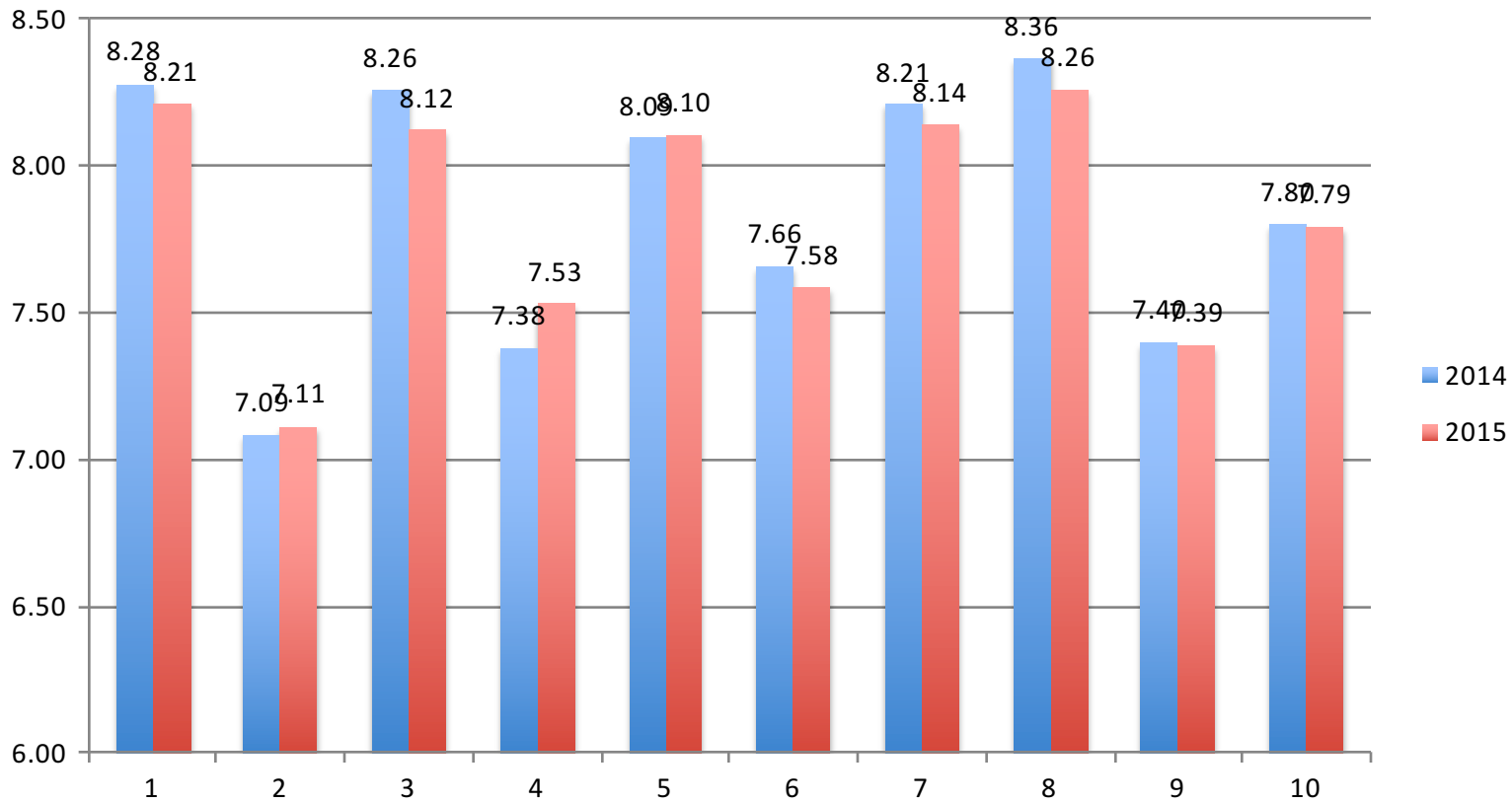
Lower score for:

- 2 Actively develops and integrates spirituality in their life

1. Cares for others
2. Actively develops and integrates spirituality in their life
3. Connects to a sense of wonder
4. Thinks symbolically or metaphorically
5. Develops their self-awareness
6. A wise decision maker who can deal w/ a variety of situations and outcomes
7. Opens themselves to a wider connection they're unable to control
8. Pursues understanding and growth
9. Develops dedication to purpose
10. Develops clear boundaries to inform intentional action

Tracking Performance on Underlying Dimensions 2014 - 2015

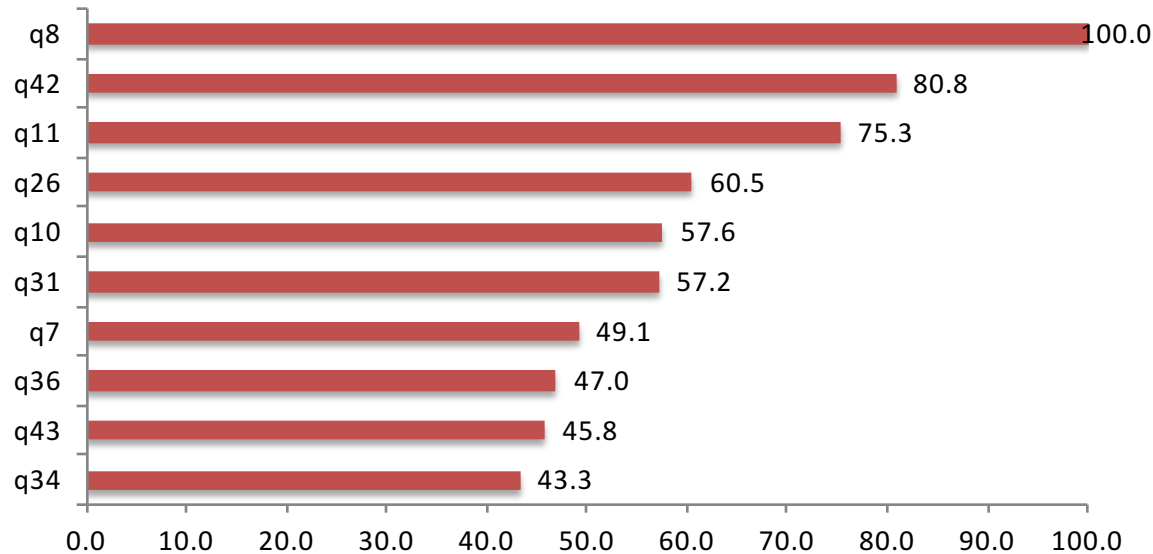
Scores on Underlying Dimensions of SM - 2014 - 15



• Differences are small.

Drivers of SM – Which of the 44 individual SM items are most correlated with Overall SM?
 Chart shows the top 10 items

Drivers of SM - 2015



* Numbers are indices and are a function of a item's correlation with the overall measure of SM. Item with the maximum correlation is given a value of 100.0; other numbers represent the ratio of an item's correlation to that of the item with the max correlation.

q8	I actively practice my spiritual or religious faith.	(GO)
q42	I act in a religious manner.	(GO)
q11	I act in a spiritual manner.	(GO)
q26	Having good boundaries allows me to act with intention.	(GO)
q10	I give to others fully and generously.	(GO)
q31	I act with awareness of my place in the interconnected web of existence.	(GO)
q7	I have a clear purpose to my life and am able to articulate that purpose to both myself and others.	(GO)
q36	My spiritual growth is important to me.	(GO/GS)
q43	I believe my life has meaning and purpose.	(GS)
q34	I make good decisions about when to act.	(GO)

GO = Greater Opportunity
 GS = Greater Strengths
 ...see quadrant map – next section

What Do Spiritual Maturity Comments Tell Us?

- Many people have significant concerns about this portion of the congregational survey.
 - Several comments about the length of the survey being too long and wondering about the return on their investment of time.
 - Several concerns about the questions themselves and the methodology of this section.
- Comments on this section also included several very thoughtful reflections on spiritual work and its meaning.
- Next year's survey, assuming we complete development of Spirit Map, should provide more return on investment for completing this section, including individual reports with spiritual strengths and opportunities. In addition, we'll provide more comprehensive background on how this section was developed for those interested.

Prescriptive Results

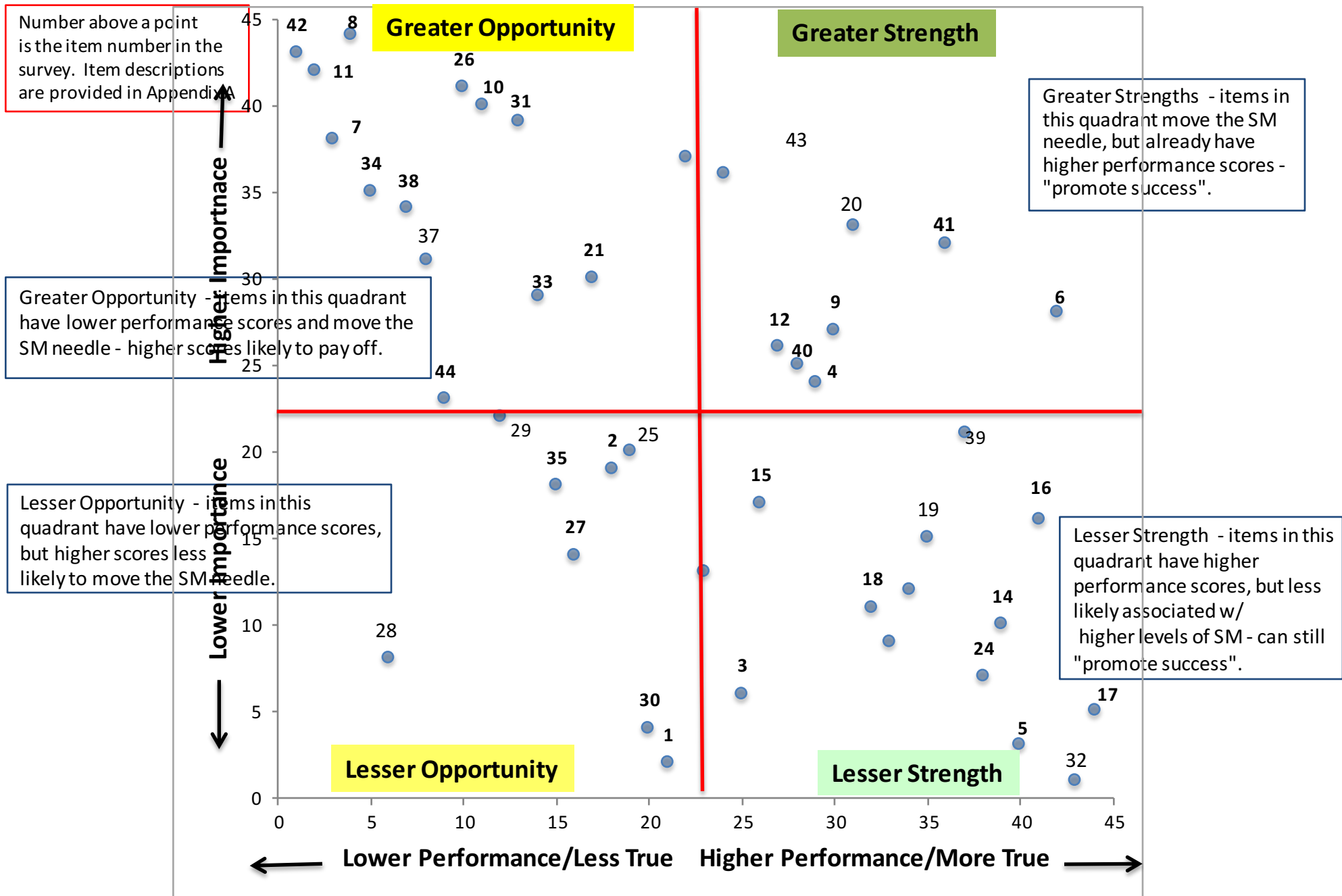
The next section provides information to help strategize about programs, activities and initiatives to enhance the level of spiritual maturity of our congregation.

Two analyses are provided. The first combines SM item performance and importance (correlation with o/a SM – see Drivers of SM chart) and plots them in a “Quadrant Map” – a graphical display of the 44 items with *performance* and *importance* rankings forming the two axes of the graph.

Because this plot of 44 points requires careful study to reach tactical and/or strategic decisions, we jump-start the process by providing a set of five Key Opportunities and five Signature Strengths using a simple algorithm that combines the performance and importance rankings. These KO/SS are shown in the context of all 44 items in the Quadrant Map.

The second analysis identifies those SM items that maximally discriminate among four levels of SM.

Quadrant Map – a graphical display of the 44 SM items with *performance* and *importance* rankings forming the two axes of the graph - UCU 2015



Top Five Key Opportunities and Signature Strengths - UCU 2015
Determined using a simple algorithm that combines the performance and importance rankings

Signature Strengths (relatively high performance; relatively high importance)

6 *Leading a moral life makes me happy.*

41 *I can give loyalty to another's leadership without losing my integrity.*

20 *I am self-aware.*

43 *I believe my life has meaning and purpose.*

9 *I seek harmony with others.*

Key Opportunities (relatively lower performance; relatively high importance)

42 *I act in a religious manner.*

8 *I actively practice my spiritual or religious faith.*

11 *I act in a spiritual manner.*

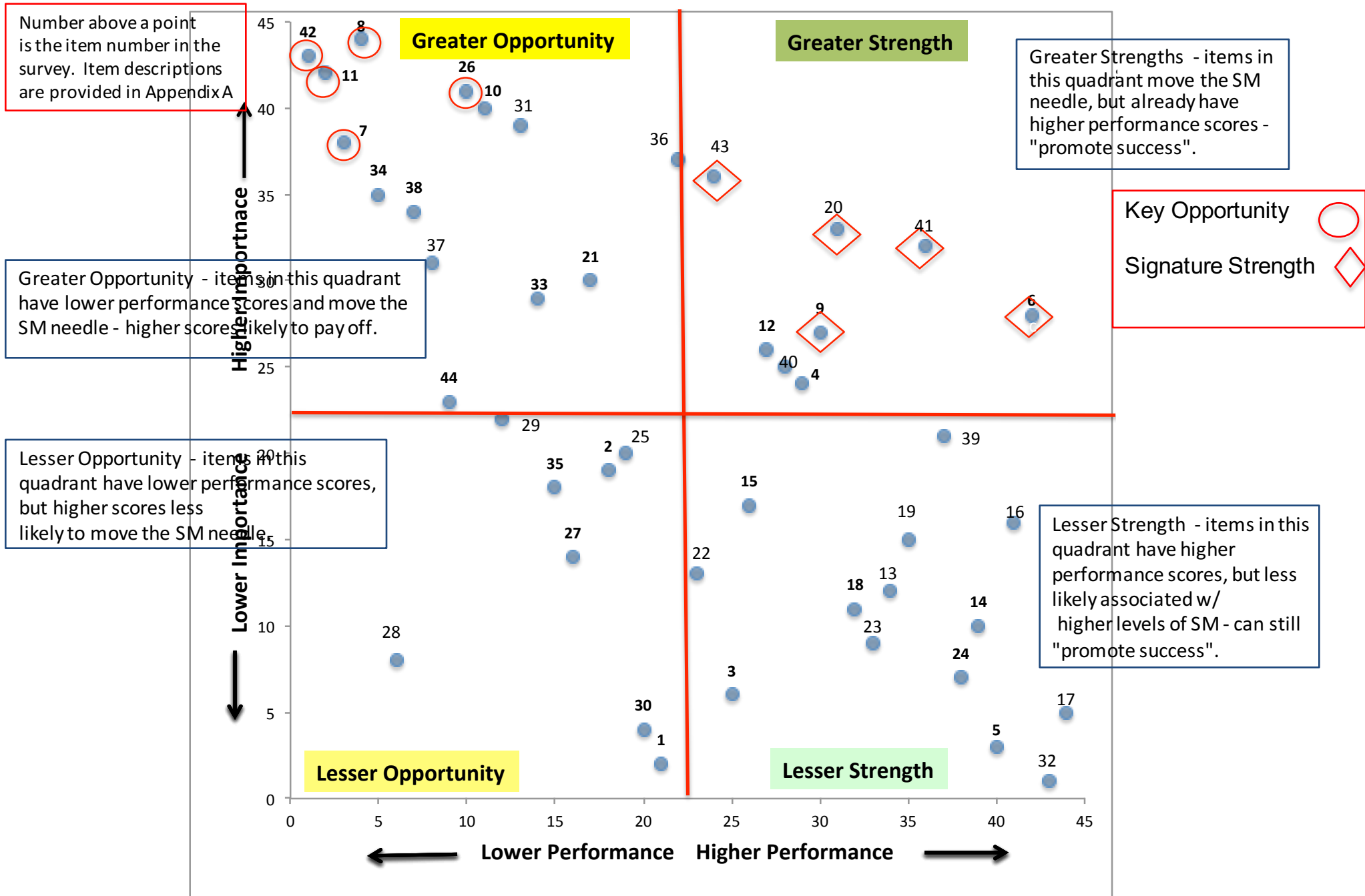
7 *I have a clear purpose to my life and am able to articulate that purpose to both myself and others.*

26 *Having good boundaries allows me to act with intention.*

It might be of interest to observe that a SS is (43) “*I believe my life has meaning and purpose*” and that a KO is (7) “*I have a clear purpose to my life and am able to articulate that purpose to both myself and others*”. So a question to ask is how can we help people articulate the purpose (and meaning) they inherently know their lives have but have difficulty expressing?

The next slide shows the location of these KO and SS on the quadrant map.

Quadrant Map – Showing Key Opportunities and Signature Strengths in Context of all 44 SM Items – UCU 2015



Signature Strengths and Key Opportunities Some Considerations

- RE: Signature Strengths

If we think of these items as reflecting our identity and brand, the items our community values and feels relatively confident they possess, how could we reinforce this identity in our community and beyond? For example, can we leverage these Signature Strengths in our communications or promotional materials? In what ways do our programs, activities, and initiatives leverage these strengths to help people develop new strengths or areas where we're not particularly strong?

- RE: Key Opportunities

In what ways do our programs, activities and initiatives help people develop these areas of their spiritual lives? What could we enhance about our programs, activities and initiatives to promote or encourage improvement in these areas?

Using Both Analytical and Visual Approaches

Seeing your Signature Strengths and Key Opportunities in the context of all 44 items plotted in your Quadrant Map may give you some ideas of how you'd like to modify the analytically derived sets of Signature Strengths and Key Opportunities presented above. These analytically derived lists provide you with a starting point for creating a plan or a strategy for enhancing and developing the spiritual life of your congregation which the Quadrant Map may help you modify.

Rank order of all Strength items as determined by algorithm

6	Leading a moral life makes me happy.	1.00	greater strength
41	I can give loyalty to another's leadership without losing my integrity.	0.98	
20	I am self-aware.	0.87	
43	I believe my life has meaning and purpose.	0.73	
9	I seek harmony with others.	0.69	
39	I experience awe.	0.66	
12	I am reflective.	0.60	
40	I am able to exercise power without corruption.	0.60	
4	I feel part of something larger than myself.	0.59	
16	I care deeply about the welfare of others.	0.56	lesser strength
19	I act with integrity.	0.45	
15	I act in an authentic manner.	0.38	
13	I am respectful of the feelings, actions, and opinions of others	0.35	
14	I take responsibility for the consequences of my actions, even those that are unintended.	0.33	
18	I act with the interests of others in mind.	0.30	
22	I am mindful of my emotions.	0.25	
23	I see something universal in all human struggle.	0.25	
24	I accept ambiguity as inherent in life.	0.23	
17	I believe it matters what I do.	0.19	
3	I delight in experiences both great and small	0.13	
5	I seek opportunities to learn and grow.	0.10	
32	I am curious to learn more about how the world around me works.	0.04	

Second Prescriptive Analysis - Exploring the Difference Between Spiritual Maturity Categories

At the conclusion of the main part of our Spiritual Maturity survey we ask the following question:

Taking the items above as speaking, in aggregate, to your overall level of spiritual maturity, plus any other items we may have missed, and recognizing that some item will be more important to you than others: How would you rate your current level of overall spiritual maturity? 1 = lowest level; 10 = highest level.

Based on the response to this question, we define four SM categories:

SM eval = [1, 2, 3, 4] = category 1 (C1)

SM eval = [5 or 6] = category 2 (C2)

SM eval = [7 or 8] = category 3 (C3)

SM eval = [9 or 10] = category 4 (C4)

We could label these categories something like:

C1 = exploring SM

C2 = growing in SM

C3 = approaching SM

C4 = SM - centered

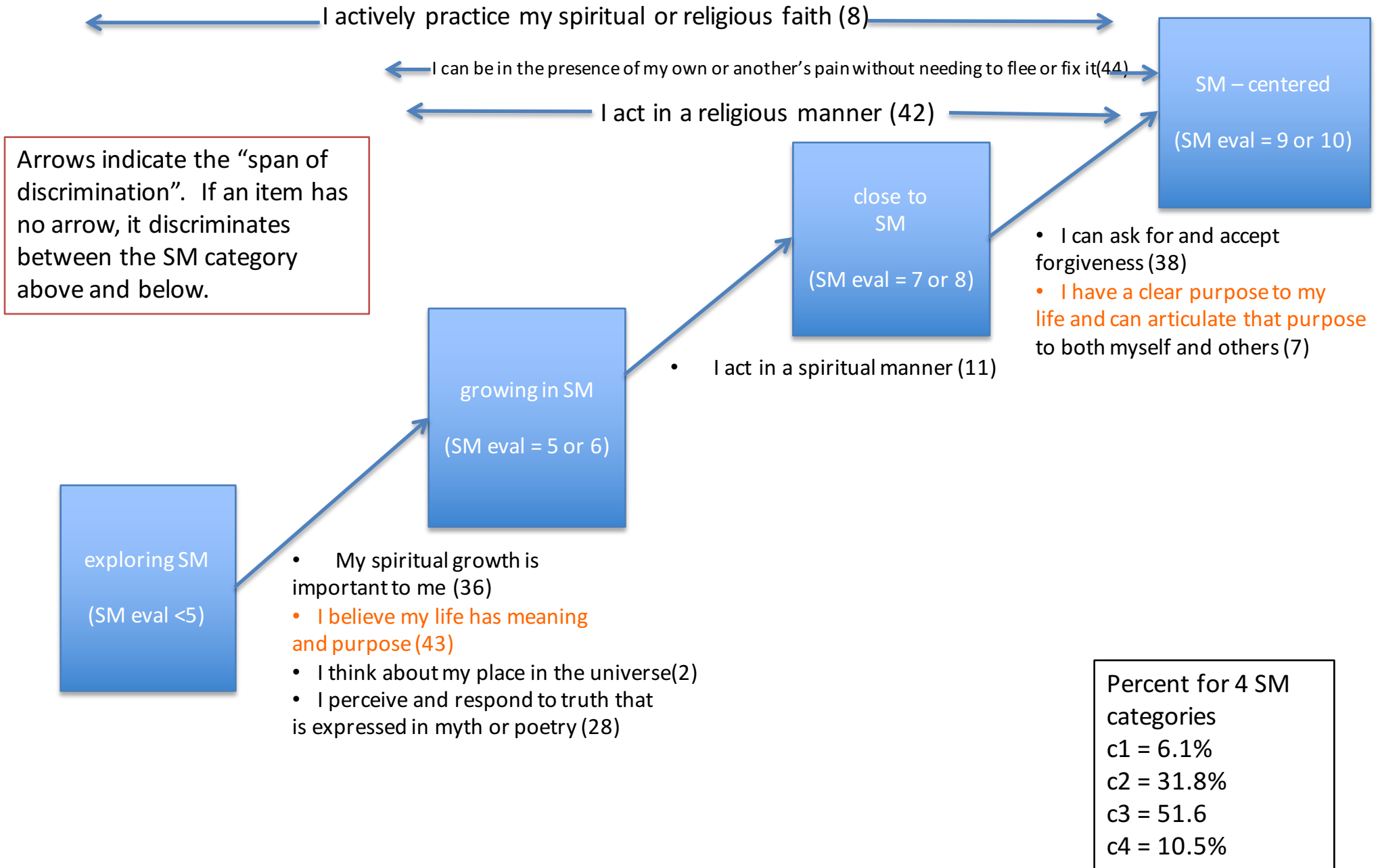
Analysis

The analysis is pretty straight forward. We calculate the average score on each of the 44 items for respondents in each of the four SM categories. We then identify those items which have the largest statistically significant differences for respondents in adjacent groups: C1 and C2, C2 and C3, and C3 and C4.

In other words, we identify those items that maximally discriminate between folks in adjacent spiritual maturity categories.

Note: because of the small sample sizes in categories C4 and especially C1, the data for this analysis is from our pilot study where we had 503 respondents from four congregations.

Items that Maximally Discriminate Between Levels of SM



Program/Activity Evaluation*

Program/Activity	Impact on SM (1 – 5 scale)
MUSIC	4.44
WORSHIP AND MEDITATION	4.16
PILGRIMAGE	4.02
PASTORAL CARE	4.00
CHILDREN'S RE	3.99
ADMINISTRATIVE	3.95
COMMUNITY OUTREACH	3.88
ADULT RE	3.82
READING AND WRITING	3.79
FOOD MINISTRY	3.73
FELLOWSHIP	3.51

*Because of what we believe to be confusion about our instructions this year, many respondents used the “no impact response (1)” to indicate they did not participate in the activity – and hence it had no impact on their SM.

The mean scores in the table were computed disregarding those “1” responses.

Based on our experience with previous years’ evaluations of specific programs/activities, we believe these averages are close to what they should be if everyone was clear about the instructions.

Appendix B – 2014 Ends Statements

- w/l 1 Open ourselves to compassionate pastoral care in times of joy, sorrow, and transition
 - w/l 2 Develop spiritual practices that nurture reverence and encourage diverse worship services rich in beauty, serenity, community and joy
 - w/l 3 Embrace our identity as Unitarian Universalists and live out the principles of our shared faith in our daily lives
 - w/l 4 Cultivate a spirit of curiosity and welcome, growing from a desire for authentic relationship.
-
- among 1 Sustain and encourage one another in love
 - among 2 Reach out to one another across differences and stand together in the face of injustice
 - among 3 Value our shared ministry and practice it with integrity
 - among 4 Foster a culture of open, inclusive leadership and meaningful engagement
 - among 5 Are generous with our time, talents, resources and creativity
 - among 6 Are careful stewards of our resources and facilities
-
- beyond 1 Open our doors and our hearts to those who seek comfort, courage, and meaning
 - beyond 2 Build authentic relationships with people across differences, in the spirit of humility and reverence
 - beyond 3 Live out our commitment to racial reconciliation and to dismantling racism
 - beyond 4 Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
 - beyond 5 Participate actively in the larger Unitarian Universalist community.