

Results of 2018 Congregational Survey – Unity Church Unitarian

August 2018

Outline

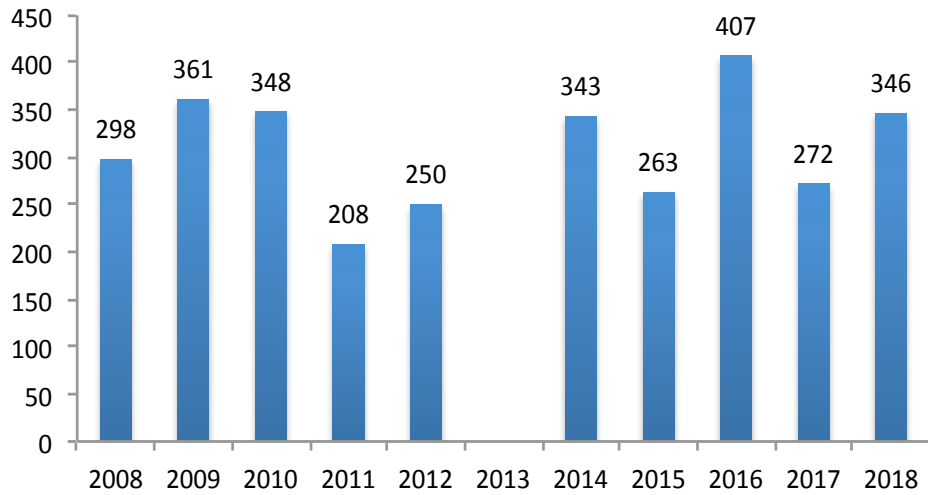
- Survey Structure
- Sample characteristics
- Evaluation of Ends Statements
 - Tracking Ends Over Five Year History
 - 2018 Ends
 - 2018 Ends by white v. non-white families
- Loyalty Tracking
- Evaluation of Programs and Activities
- What do comments tell us?

Congregational Survey Structure

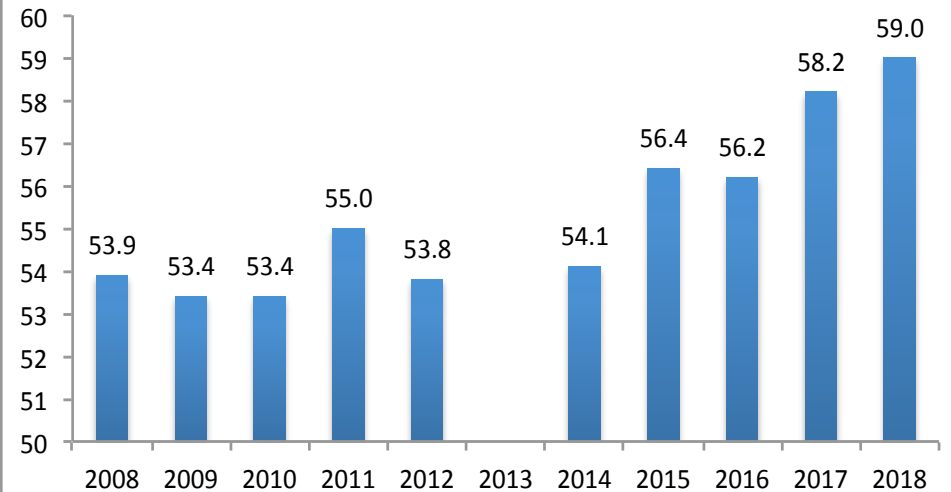
1. Ends Statements/Loyalty – Focus is on UCU (in contrast to Spirit Map where the focus is on us as individuals)
 - evaluation of performance on 15 current Ends Statements
 - loyal/at-risk evaluation – “Would you recommend UCU to a friend or relative”
2. Program/Activities
 - evaluation of impact on spiritual well-being of UCU programs and activities
3. Demographic information

Sample Characteristics 2008 - 2018

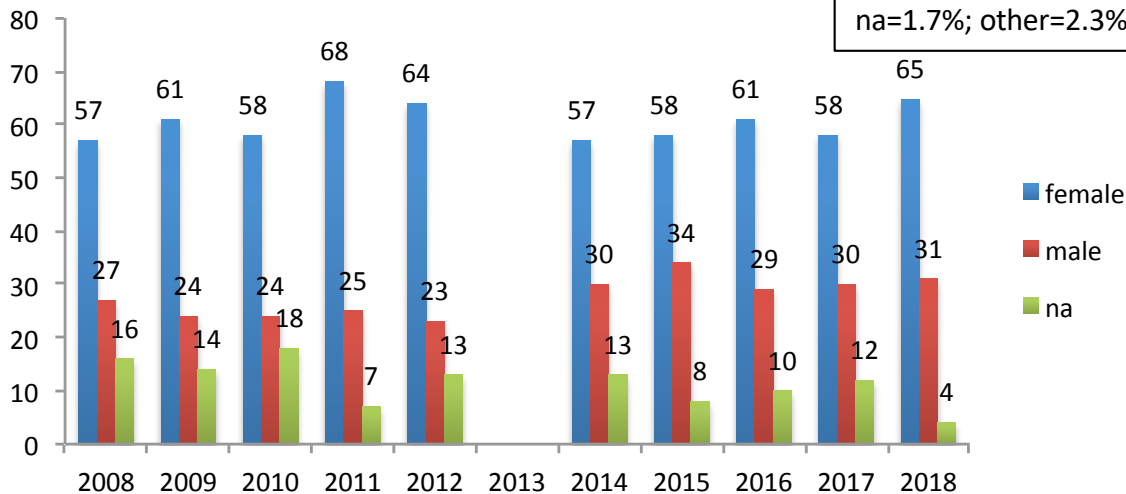
Sample Size



Age



Gender Distribution

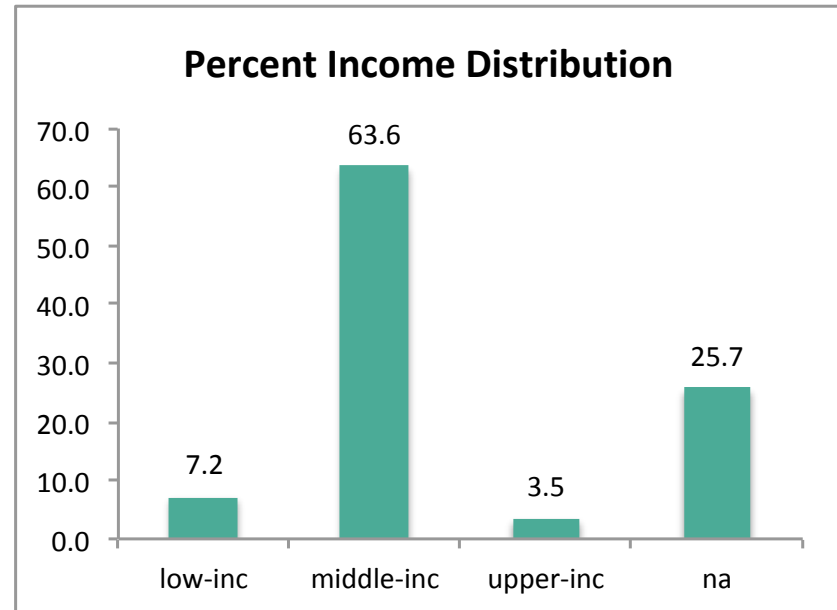
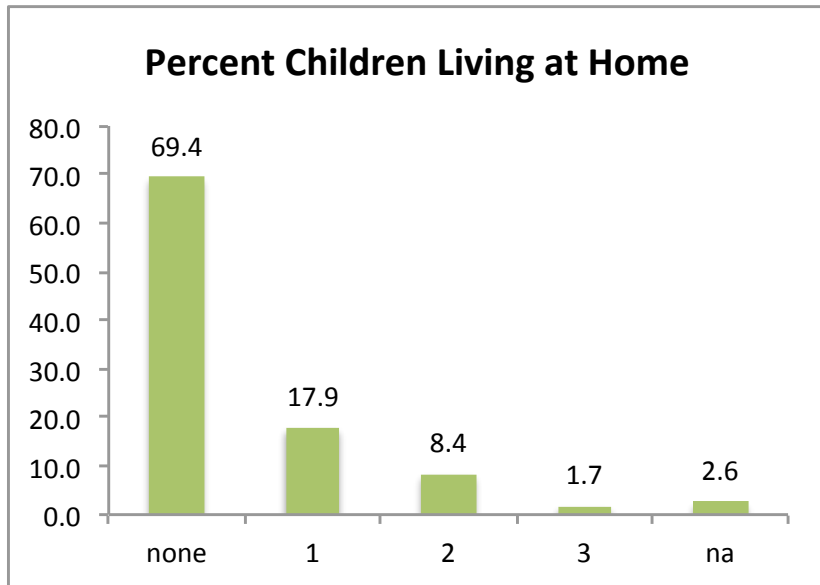
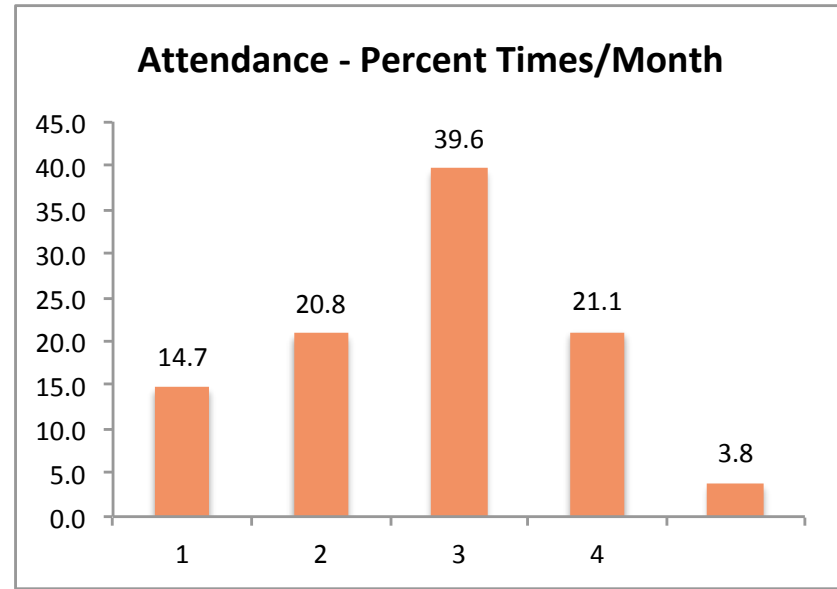
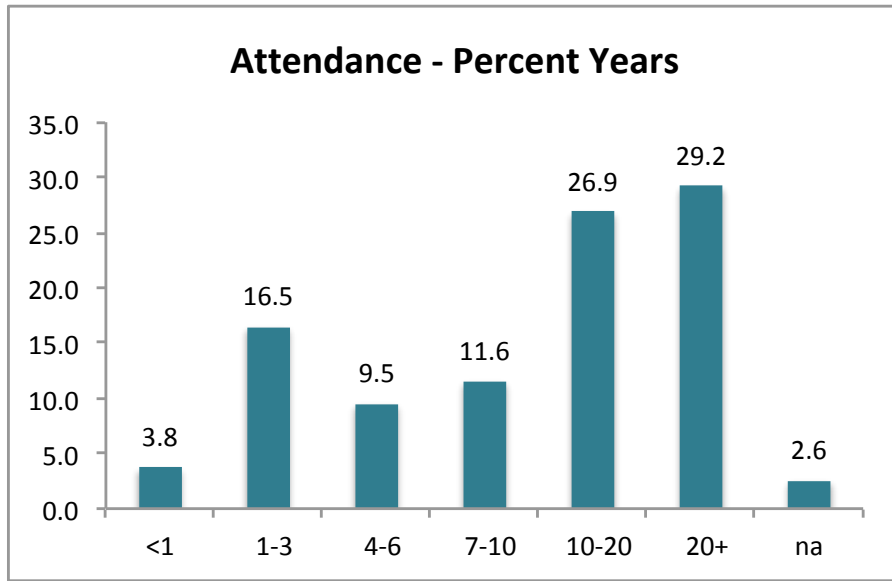


Note: in 2018
na includes other.
na=1.7%; other=2.3%

Note re: Age. This year we had age categories for 76-85 and 85+. In prior years r's in these categories would have been counted as being 70 (over 66). Making this assumption this year drops the ave age to 57.7 (from 59.0), so actually lower than last year.

- Male response continues at approximately 30%; previous na's identify as female.
- Age continues upward trend; but artifact of categories used – see note above.

Sample Characteristics 2018



Key Takeaways

- *Five year Ends evaluation trends: up for almost all Ends (13/15).*
- *Year/year evaluations (2018 v 2017): up for Within and Among Ends; down for Beyond Ends (W>A>B).*
- *Ends evaluations in 2018 by families of color at parity with evaluations by white families.*
- *Loyalty and Net Loyalty are down slightly. There are interpretation challenges due to a sampling issue.*

A Look At Five Year Ends History

Difference (2018 - 2014) in Ends Evaluation over Five Years Ranked from Largest to Smallest

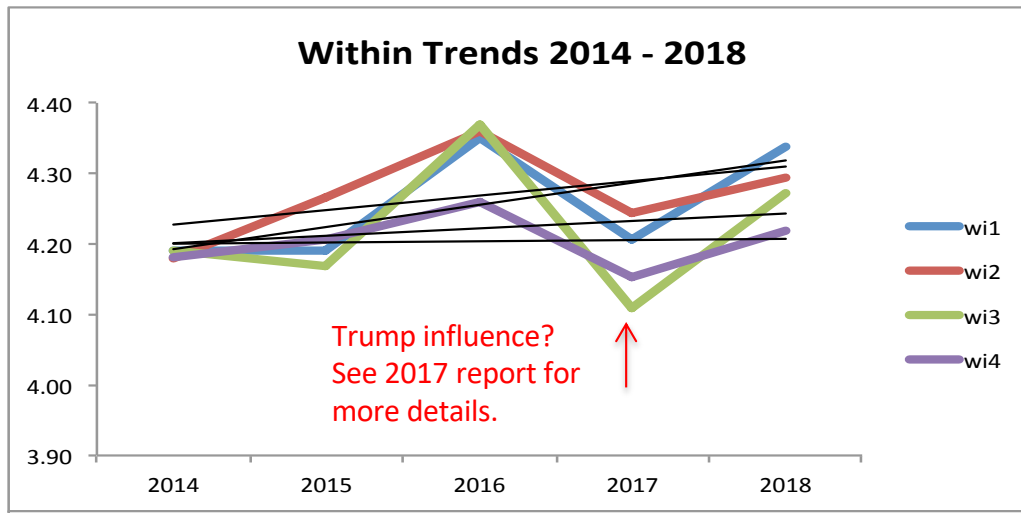
End	diff ('18-'14)	confidence level associated w/ diff
b4	0.19	*
a1	0.17	*
wi1	0.15	*
wi2	0.11	**
a5	0.10	**
b5	0.10	***
b3	0.09	**
a3	0.09	***
b1	0.08	**
wi3	0.08	
a2	0.04	
wi4	0.04	
a6	0.03	
b2	0.00	
a4	-0.03	

>=95%	*
90-95%	**
80-90%	***

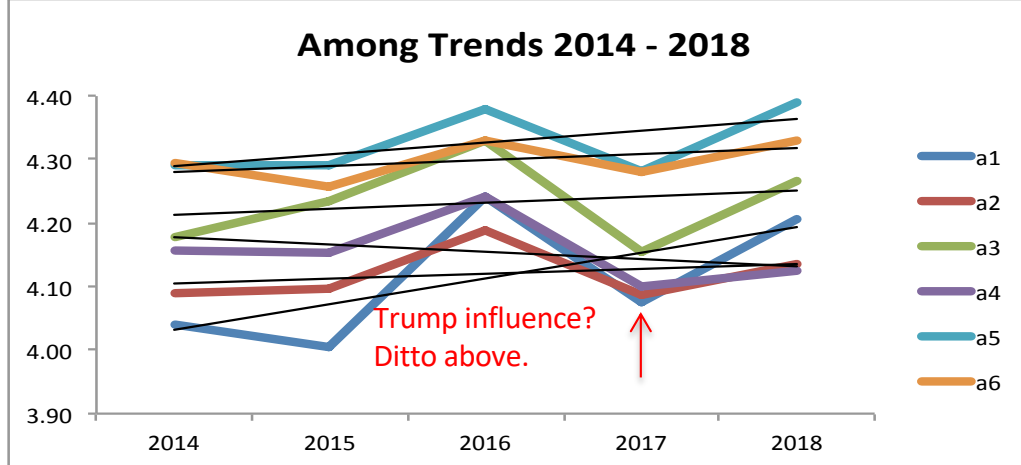
Key Points (also see trends on next two slides)

- For 13 of the 15 Ends the final evaluation (2018) > first evaluation (2014).
- Nine of the differences are statistically significant at the 80% level or higher.
- Three largest gains are for Ends b4, a1, and wi1.
b4: Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
a1: Sustain and encourage one another in love
wi1: Open ourselves to compassionate pastoral care in times of joy, sorrow, and transition
- Smallest differences are for Ends b2 and a4.
b2: Build authentic relationships with people across differences, in the spirit of humility and reverence
a4: Foster a culture of open inclusive leadership and meaningful engagement
- Differences are small, but we note that the average End in 2014 had an evaluation of 4.14 (max possible is 5.0). In other words any gains are hard earned – big downside risk, small upside potential. For example, if 325 people all rated an End a 4, the ave would, of course, be 4.0. One way to move that ave to 4.2 (much like the gain for b4), would require 65 people (20%) to move to 5, the rest remaining at 4.

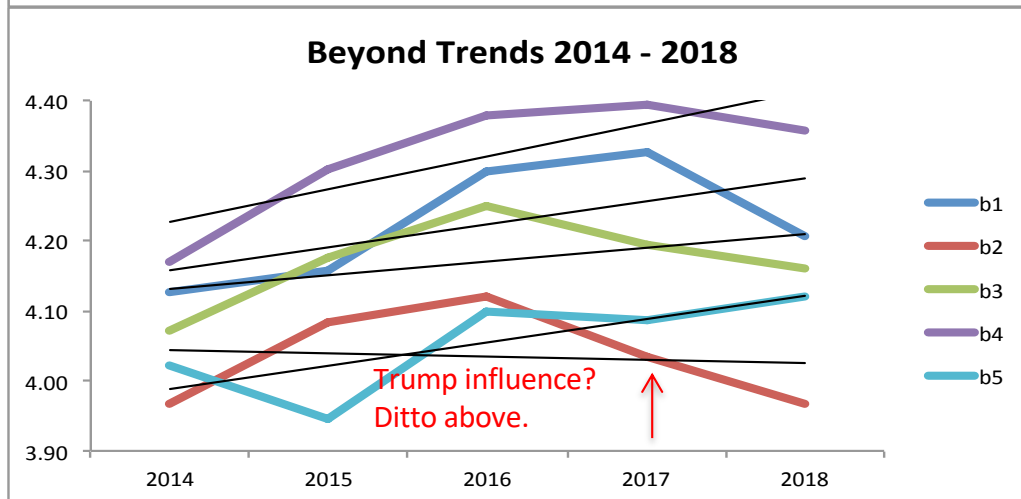
Five Year Trends (Trend Lines are best fitting linear trend lines)



- All Within Trends are positive.
- Within Ends vary over the narrowest range vi-a-vis Among and Beyond Ends.
- wi1 and wi2 are statistically greater in 2018 v 2014.
- All Within Ends are greater in 2018 than in 2017.

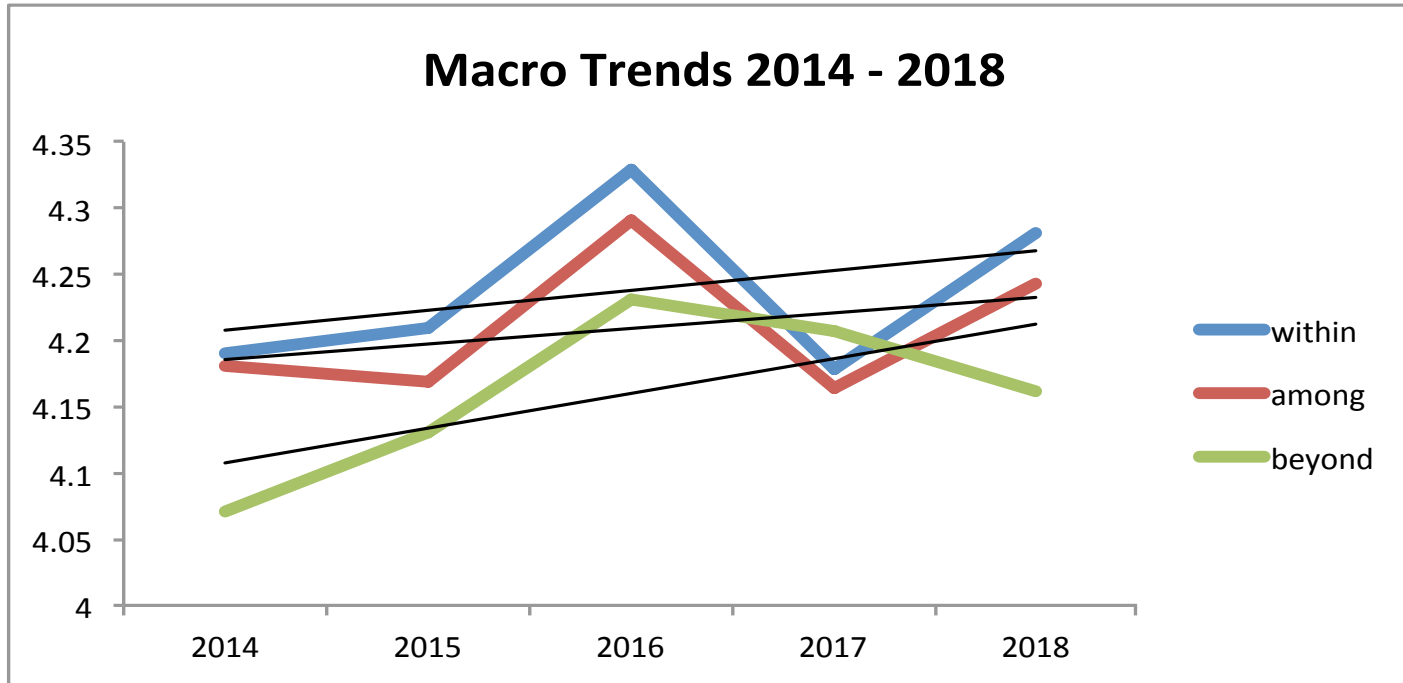


- All Among Trends are positive with the exception of the trend for a4 (slightly negative).
- All Among Ends are greater in 2018 than in 2017 with the exception of a4 (difference is not statistically significant).
- a1, a3, and a5 are statistically greater in 2018 v 2014.



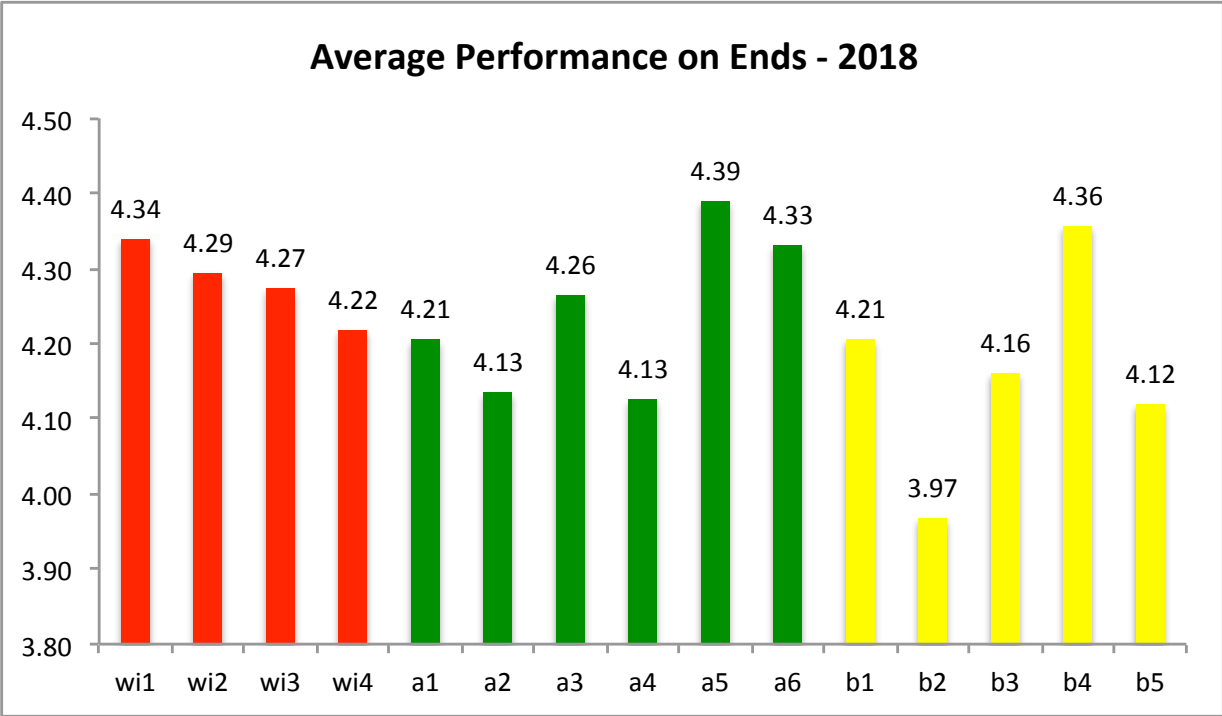
- All Beyond Trends are positive with the exception of the trend for b2 (slightly negative).
- Beyond End b5 is greater in 2018 than in 2017; the rest are lower in 2018 than in 2017; all are greater than 2014 except for b2 which is at parity with 2014.
- b1, b3, b4, and b5 are statistically greater in 2018 v 2014.

Five Year Trends (Trend lines are best fitting linear trend lines)



- Macro trends for Within, Among, and Beyond all positive over life of Ends.
- Within trend line > Among trend line > Beyond trend line.
- Slope (gains) for Beyond Ends greater than slope/gains for Within and Among...gap is narrowing.
- All Macro Ends in 2018 > 2014.
- Within and Among Macro Ends in 2018 > 2017; Beyond End in 2018 < 2017.

Evaluation of Ends Statements – Averages



- Highest Ends are a5 and b4; lowest is b2
- ***Ave for all Ends are in Agree/Strongly Agree territory (>= 4.0).***

differences >= 0.13 are statistically sig at the 95% level of confidence

differences >= 0.09 are statistically sig at the 80% level of confidence

wi = within
a = among
b = beyond

a5 (highest) Are generous with our time, talents, resources, and creativity

b4 (2nd highest) Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment

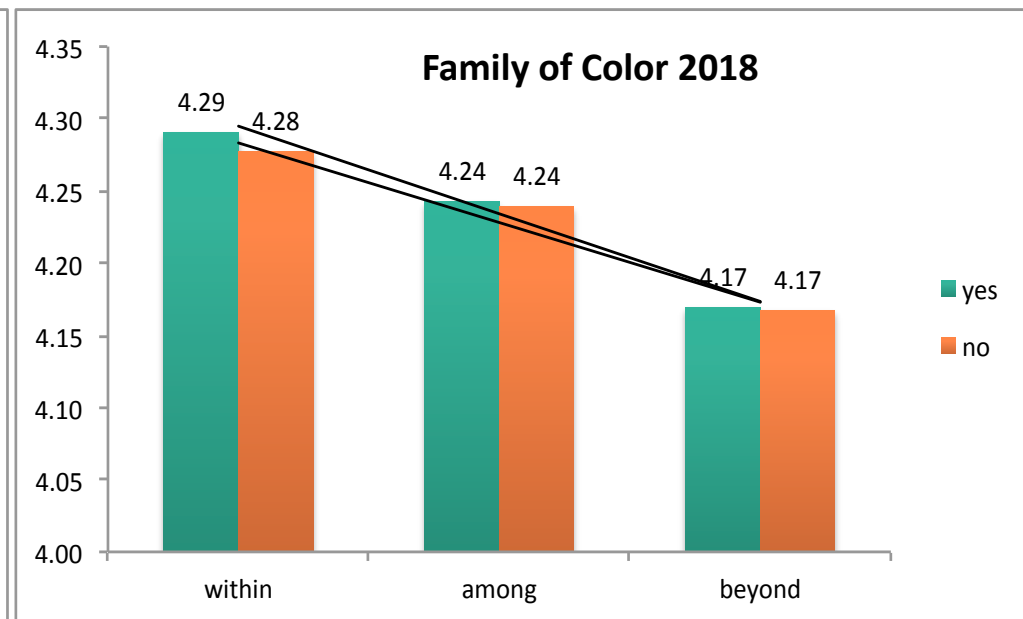
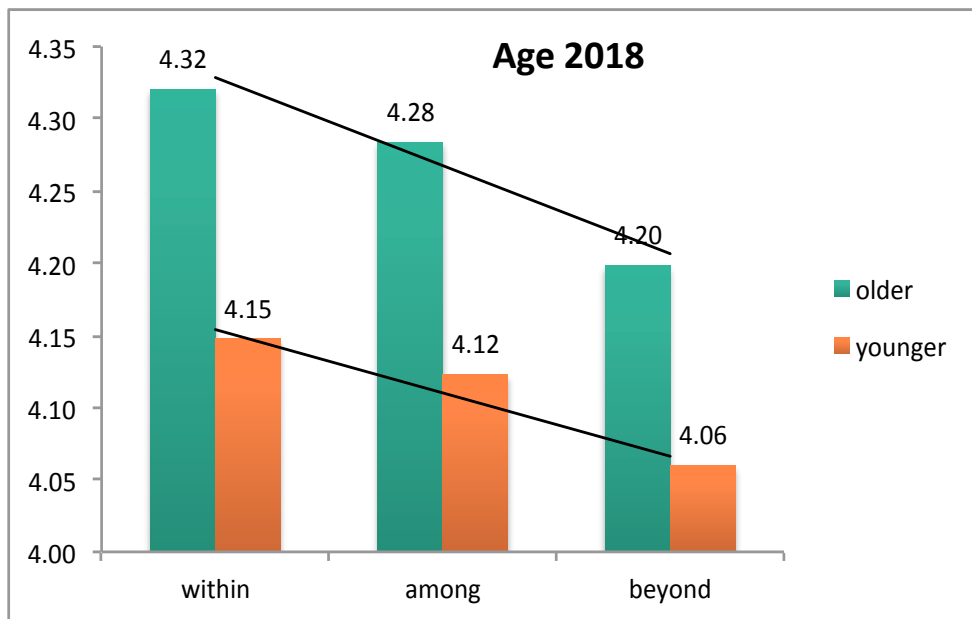
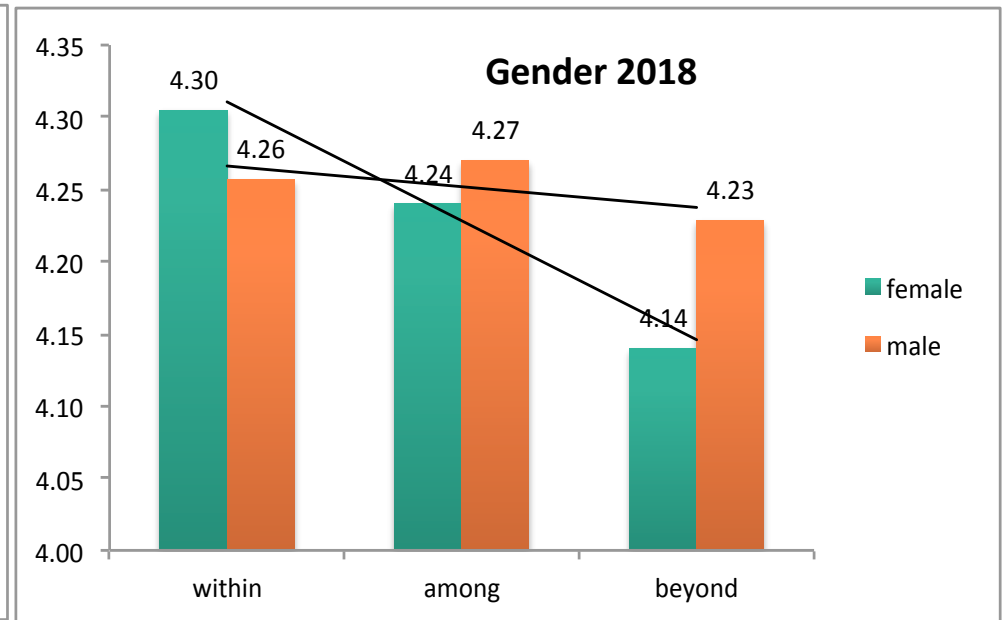
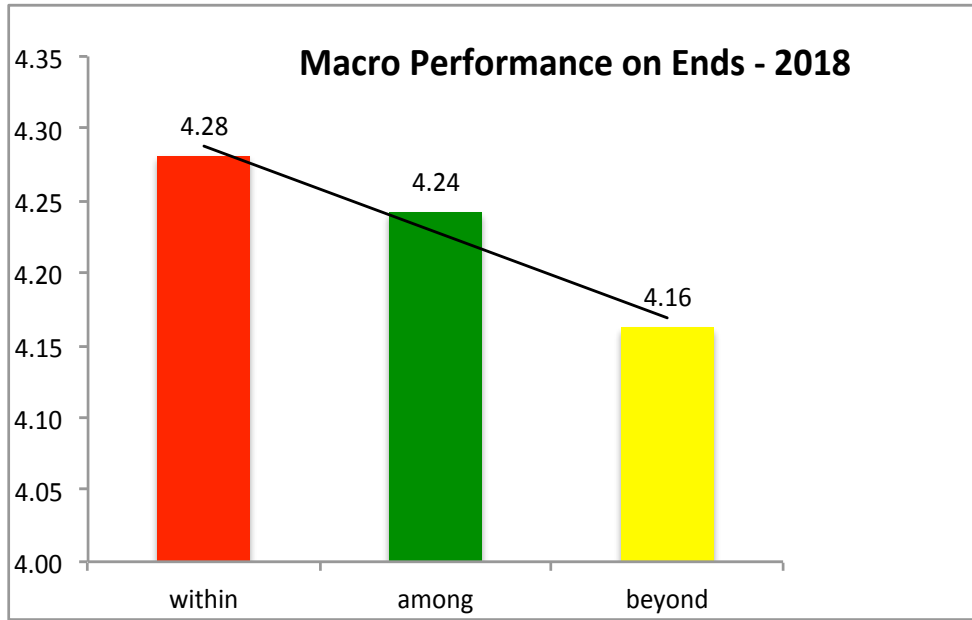
b2 (lowest) Build authentic relationships with people across differences in the spirit of humility and reverence

End	Ave Eval
a5	4.39
b4	4.36
wi1	4.34
a6	4.33
wi2	4.29
wi3	4.27
a3	4.26
wi4	4.22
b1	4.21
a1	4.21
b3	4.16
a2	4.13
a4	4.13
b5	4.12
b2	3.97

A Look at Macro Ends 2018 - Averaging Across Individual Within, Among, and Beyond Ends

This Year Previous Pattern Returns: Within > Among > Beyond (last year for first time: Beyond > Within > Among)

Pattern Also True for Gender, Age and Family of Color Samples



Evaluation of Ends Statements by Family Type (family of color/white) - 2018



Rank order of differences

diff(w-nw)	End
0.14	a4
0.10	b3
0.07	b2
0.02	wi3
0.02	wi4
0.02	a1
0.01	a3
-0.01	a2
-0.02	wi2
-0.04	b1
-0.05	b4
-0.07	a5
-0.08	wi1
-0.09	a6
-0.10	b5

differences of 0.21
are significant at the 95%
level of confidence

differences of 0.14
are significant at the 80%
level of confidence

Percent family of color = 22%
Percent white family = 75%
no answer = 3%

Family of color ratings essentially at parity or higher (for first time) with white families on most Ends – macro ratings essentially the same – see slide 6 All ratings at 4.0 or higher except for End b2.

	Do you have children living at home? (percent)				
	none	Age<=2	Age 3-6	Age 7-12	Age 13-18
white	72.6	2.3	6.9	14.7	13.1
non white	63.2	5.3	13.2	21.1	14.5

Why the 2018 Loyalty Data is a Challenge

Loyalty question is: “Would you recommend UCU to a friend or relative.”

As we’ve asked this question in work with our own and other congregations, we’ve received open end comments to the effect that “...as UU’s we’re not comfortable acting proactively in recommending...” So we thought we’d run a little experiment.

Survey Monkey allows us to do a “split sample” experiment – half of respondents see question version 1 (current version) and half see question version 2 (new): “Would you recommend UCU to a friend or relative if they asked for a church recommendation.”

As we hypothesized, the new version (V2) elicited higher loyalty metrics, but those same metrics are uncharacteristically low for the current version (V1):

	New (V2)	Current (V1)	2017
Loyalty	79.6	72.2	77.6
Net Loyalty	76.2	64.8	73.7

Further investigation reveals that those who received version 2 also gave relatively higher evaluations to the ENDS (all of them) --

Why the 2018 Loyalty Data is a Challenge

Version 2 (...recommend if asked..) respondents gave across the board higher Ends evaluations:

	diff(v2-v1)	macro diff
beyond1	0.26	0.12 beyond
among1	0.20	0.15 among
within4	0.19	
among2	0.17	
among3	0.17	
within1	0.15	0.11 within
among4	0.13	
among5	0.12	
beyond3	0.11	
among6	0.10	
within3	0.10	
beyond2	0.09	
beyond5	0.06	
beyond4	0.06	
within2	0.02	

differences ≥ 0.15 sig
at 95% level; ≥ 0.06 sig
at 80% level

The V1 and V2 samples are well balanced demographically. V1 and V2 samples essentially the same for age, length of attendance, and family of color composition. The largest demo difference is for gender: V2 (m/f split = 29/71); V1 (m/f split = 36/64) – if anything this “imbalance” would have contributed to higher Ends evaluations for the V1 sample.

The V2 sample also gave higher Spiritual Well-Being impact rating for Sunday worship: V2 = 4.35 v. V1 = 4.26 (looked only at this activity because of the large sample size).

Why the 2018 Loyalty Data is a Challenge

Conclusion: The V2 sample with the new version of the recommend question – despite being randomly equivalent demographically to sample V1 - was predisposed to higher evaluations. The V1 sample with the current version of the recommend question was predisposed to lower evaluations.

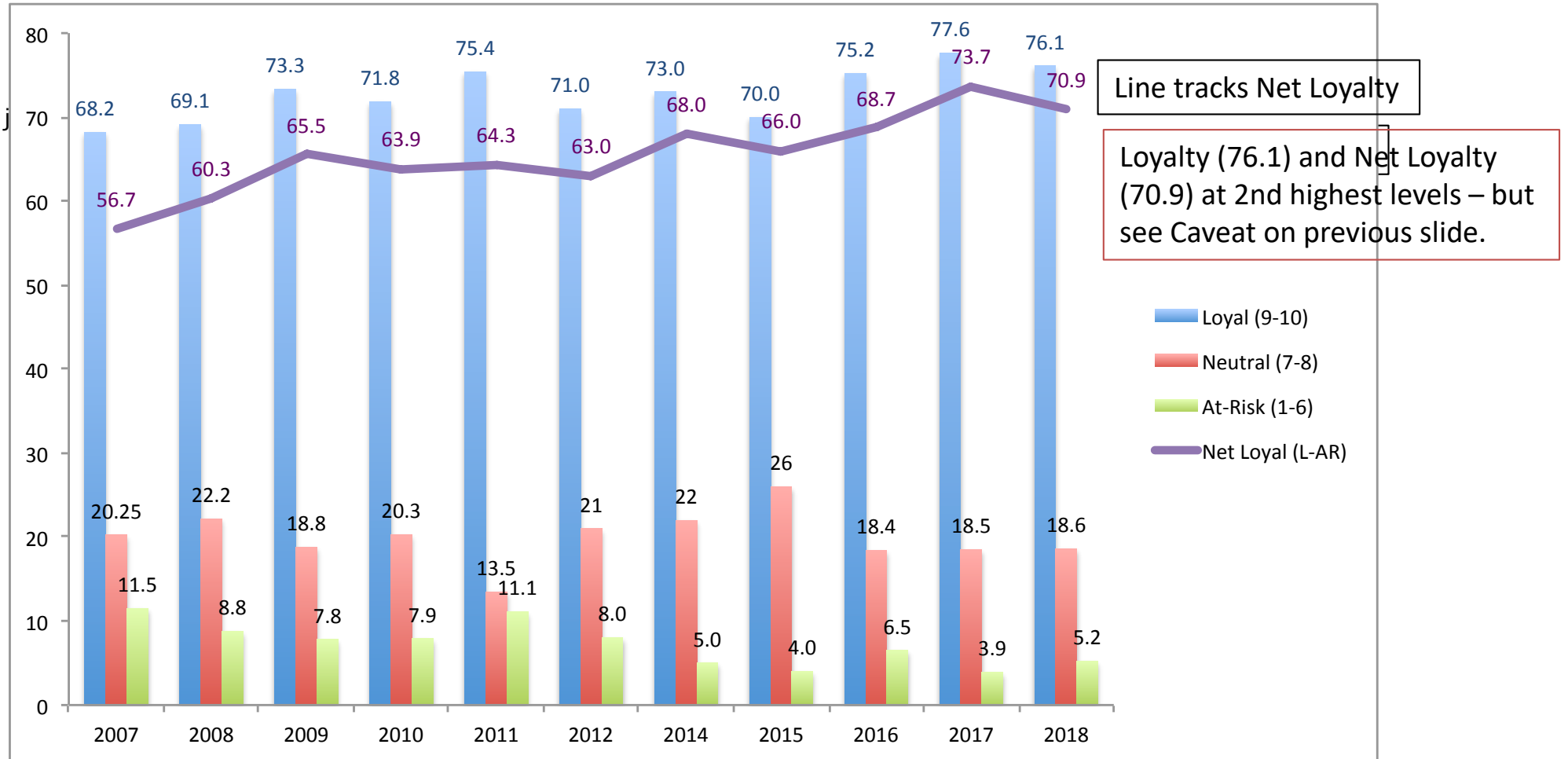
The challenge: Not knowing how to untangle the recommend response in the V2 sample to account for the experimental effect of the new question, if any, and the sampling bias for higher evaluation ratings in this sample.

One solution: Assume no experimental effect from asking the recommend question the new way. Then we can combine the responses from the two sample and calculate the loyalty metrics as usual. That is what is done to create the metrics and graph on the next chart.

Caveat: If the V2 question (new version) influenced people to answer the loyalty question more positively than they otherwise would have, then our loyalty metrics for 2018 are overstated to some unknown degree.

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 – key metric is **Net Loyalty = (% Loyal - % At-Risk)****



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

**See “The One Number You Need to Grow,” Harvard Business Review, 2003, Frederick Reichheld

Program/Activity Impact on Spiritual Well-Being - 2018

Sunday Worship, Pilgrimage, and Music top the list.
This is consistent with results in previous years.

Impact on SWB	Percent Participating	Program/Activity
4.82	9.8	Pilgrimage
4.31	93.6	Sunday Worship
4.20	29.8	Music
4.09	28.9	Ministry w/ Children and Youth
3.99	22.5	Pastoral Care
3.83	43.1	Special Worship and Meditation Programs
3.82	65.0	Adult RE
3.79	50.6	Community Outreach
3.73	30.1	Administrative
3.67	33.5	Fellowship
3.56	40.5	Reading and Writing
3.40	18.8	Food Ministry

Question: Is it worth considering ways to reframe or bring an added spiritual dimension to some of the lower rated activities to enhance the spiritual quality of the experience?

What Do Comments Tell Us?

- 174 Comments were submitted with Survey responses
- Executive Team & Board reviewed all Comments
- Vast majority of Comments were positive and appreciative
 - programming and participation opportunities
 - dedication of Unity Executive Team & staff
 - Unity as a welcoming spiritual home
- Some commenters expressed yearning for improvements
 - more diversity
 - greater sense of community within the congregation
 - deeper engagement
- Executive Team & Board used the Comments in developing new Ends Statements and maintain awareness of the Comments in governance and programming throughout the year

Ends

Within

The people of Unity Church-Unitarian value a deeply meaningful, transforming liberal religious experience. As individuals, we:

1. Open ourselves to compassionate pastoral care in times of joy, sorrow, and transition
2. Develop spiritual practices that nurture reverence and encourage diverse worship services rich in beauty, serenity, community and joy
3. Embrace our identity as Unitarian-Universalists and live out the principles of our shared faith in our daily lives
4. Cultivate a spirit of curiosity and welcome, growing from a desire for authentic relationship.

Among

Unity Church-Unitarian is a community of welcome, reverence, and deep connection. As a community, we:

1. Sustain and encourage one another in love
2. Value our shared ministry and practice it with integrity
3. Reach out to one another across differences and stand together in the face of injustice
4. Foster a culture of open, inclusive leadership and meaningful engagement
5. Are generous with our time, talents, resources and creativity
6. Are careful stewards of our resources and facilities.

Beyond

Unity Church-Unitarian carries out the work of love in community, making a positive impact in our neighborhood and in our world. Grounded in the transforming power of our faith, we:

1. Open our doors and our hearts to those who seek comfort, courage, and meaning
2. Build authentic relationships with people across differences, in the spirit of humility and reverence
3. Live out our commitment to racial reconciliation and to dismantling racism
4. Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
5. Participate actively in the larger Unitarian-Universalist community.