Final Results of 2017 Congregational Survey – Unity Church Unitarian

August 2017

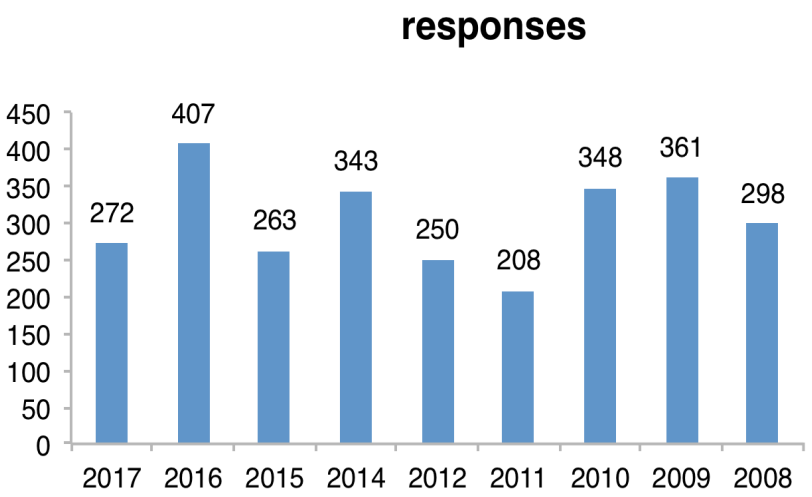
Outline

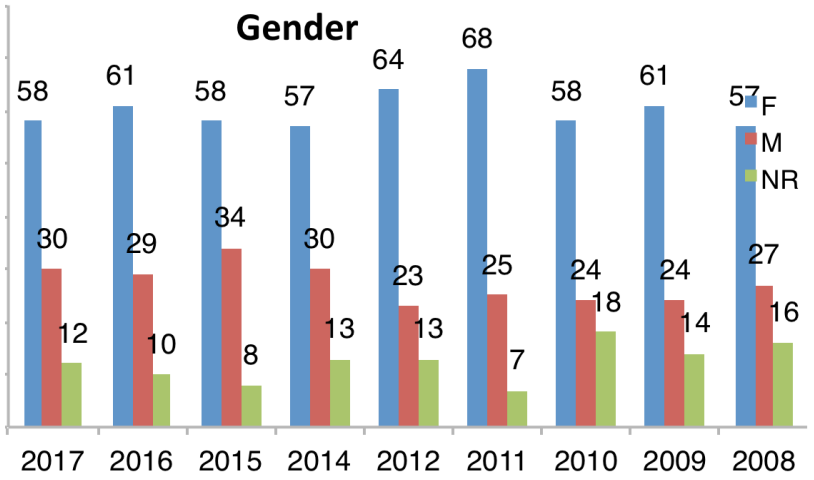
- Survey Structure
- Sample characteristics
- Evaluation of Ends Statements
  - 2017
  - 2017 v 2014 - 2016
  - 2017 by white v. families of color
- Loyal/At-Risk Profile – Net Loyalty
- Evaluation of Programs and Activities
- What do comments tell us?
- Spirit Map
  - Key Opportunities and Signature Strengths
  - Quadrant Map
  - Drivers of Overall Spiritual Maturity

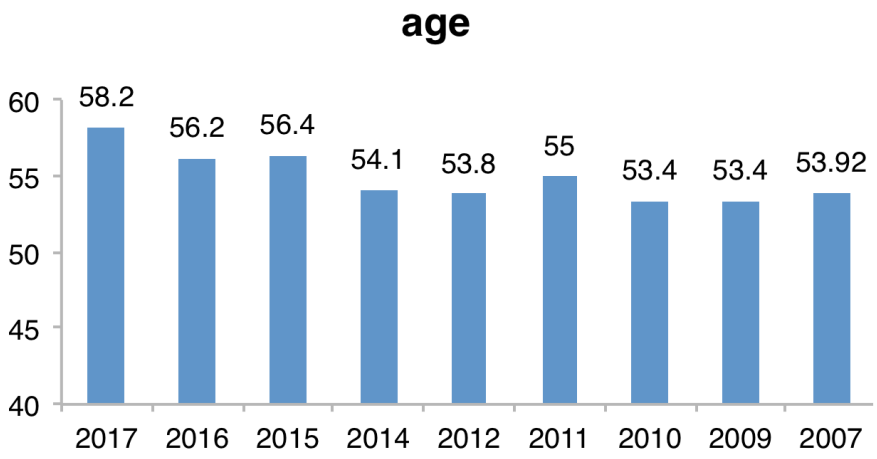
Congregational Survey Structure

1. Spirit Map Ratings – Focus is on individual
   - Self Assessment Ratings for 44 Items characterizing the domain of spiritual maturity
   - Importance Ratings for the same 44 Items
   - Self Report Rating of Overall Spiritual Maturity – current and in five years
2. Ends Statements/Loyalty – Focus is on UCU
   - -- evaluation of performance on 15 current Ends Statements
   - loyal/at-risk evaluation –"Would you recommend UCU to a friend or relative"
3. Program/Activities
   - evaluation of impact on spiritual maturity of UCU programs and activities
4. Demographic information

Sample Characteristics 2008 - 2017





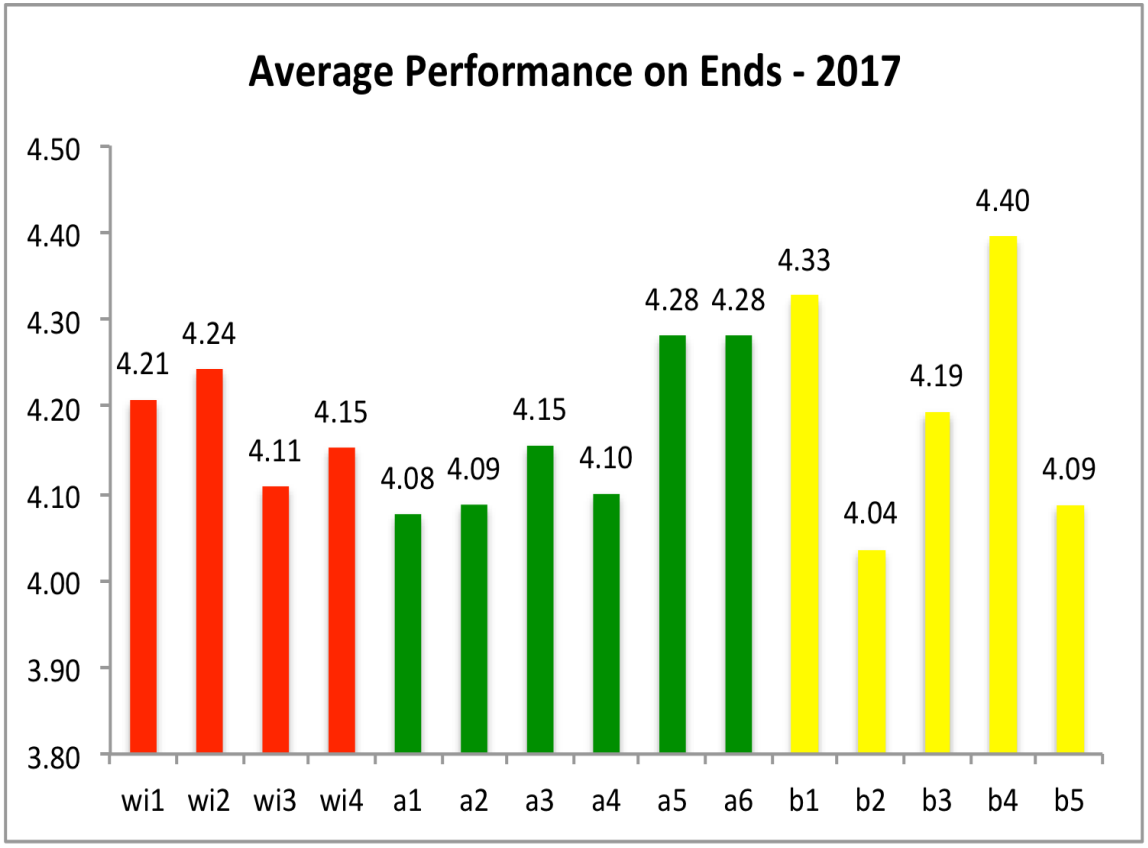


- Gender distribution in line with last three years.
- Age continues slight upward trend.

Key Themes from Ends/Loyalty Evaluations to be Explored

1. New pattern for Within, Among, and Beyond evaluations.
2. Lower scores overall on Ends vs. 2016 (not vs. 2014/2015).
3. Loyalty and Net Loyalty at their highest levels.

Evaluation of Ends Statements – Averages



- Highest, second highest and lowest Ends are Beyond Ends: b4, b1, and b2, respectively.
- *Ave for all Ends are in Agree/Strongly Agree territory (>= 4.0).*

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

differences >= 0.08 are statistically sig at the 80% level of confidence

b4 (highest) Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
b1 (2nd highest) Open our door and our hearts to those who seek comfort, courage, and meaning
b2 (lowest) Build authentic relationships with people across differences in the spirit of humility and reverence

wi = within
a = among
b = beyond

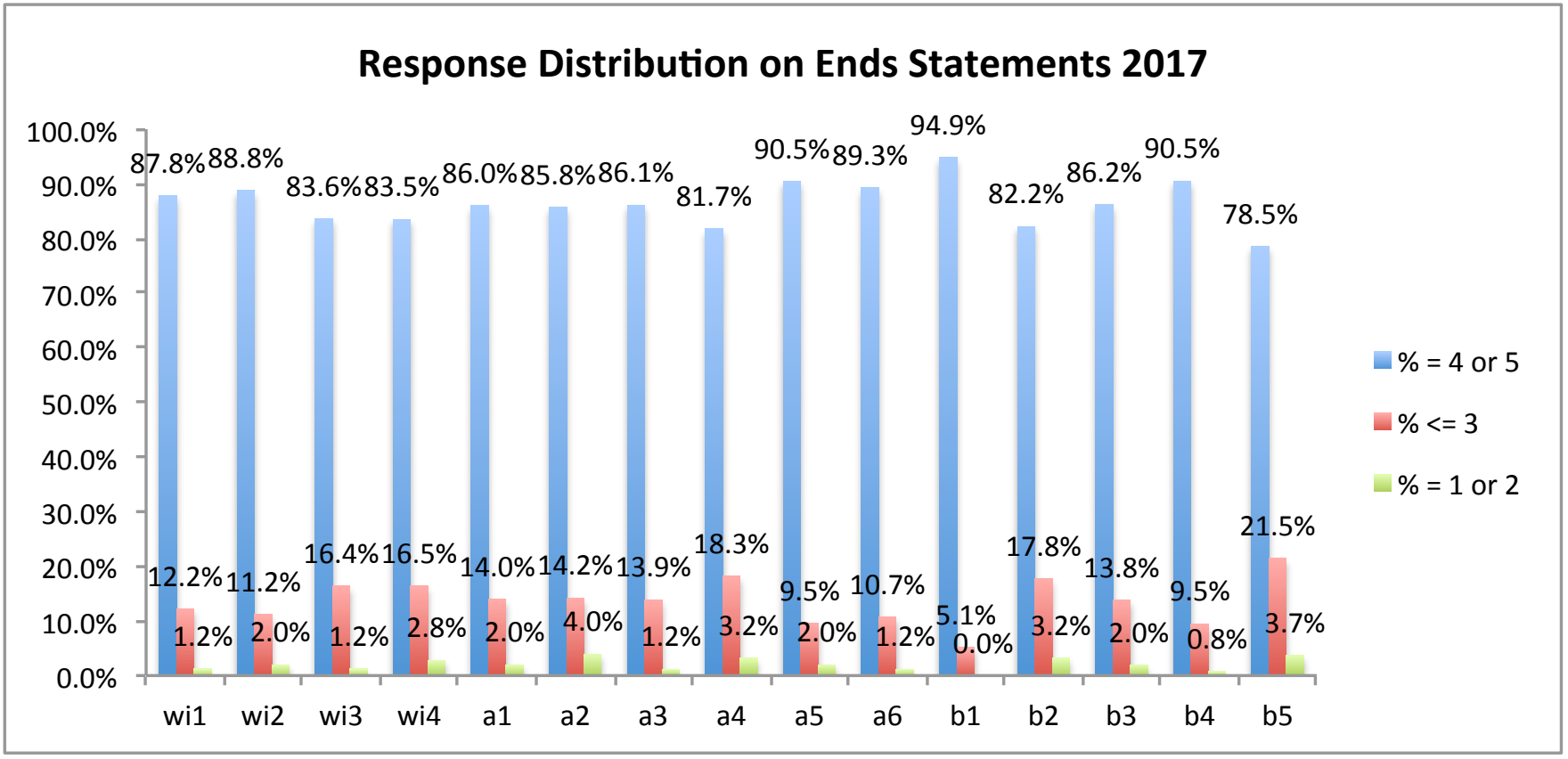
Rank Order of 2017 Ends

End	Average
b4	4.40
b1	4.33
a5	4.28
a6	4.28
wi2	4.24
wi1	4.21
b3	4.19
a3	4.15
wi4	4.15
wi3	4.11
a4	4.10
a2	4.09
b5	4.09
a1	4.08
b2	4.04

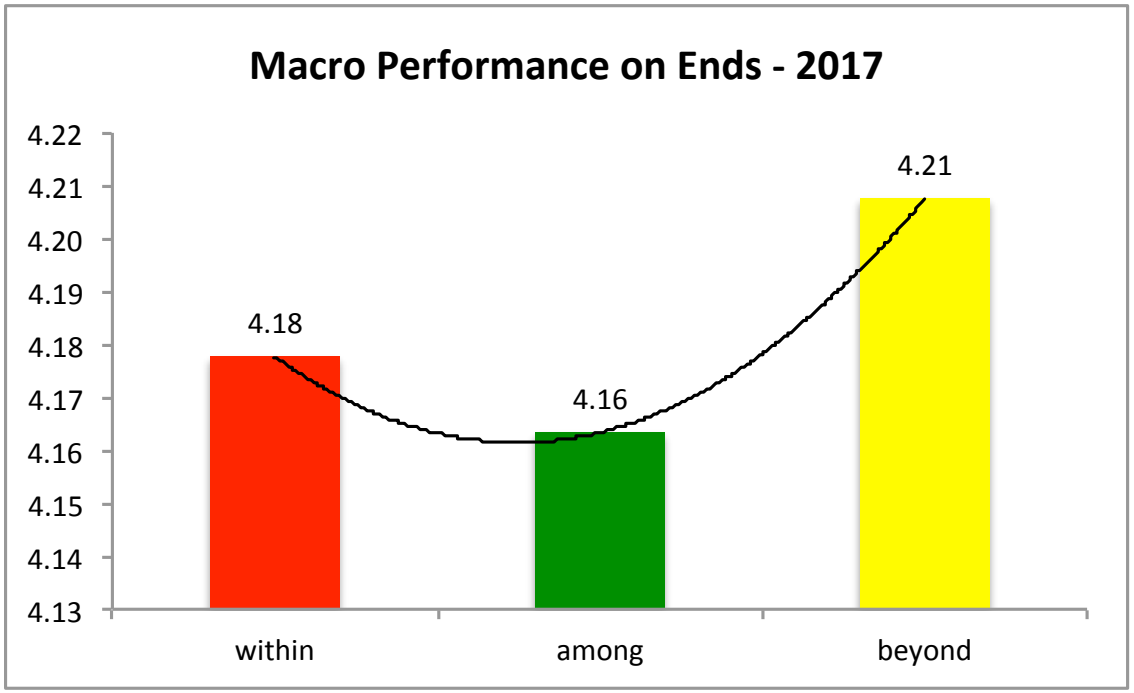
Might it be the case that even though the averages are all >= 4.0 that there could be a situation where a significant number of people had negative evaluations?

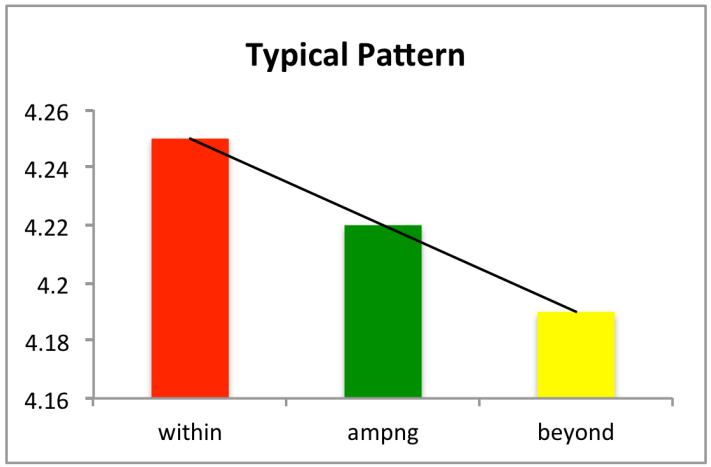
For example it could be the case that 75% of respondents rate an End a 5 and 25% rate the End a 1. The average for this scenario would be 4.0, and we would probably be concerned that so many congregants provided such low scores.

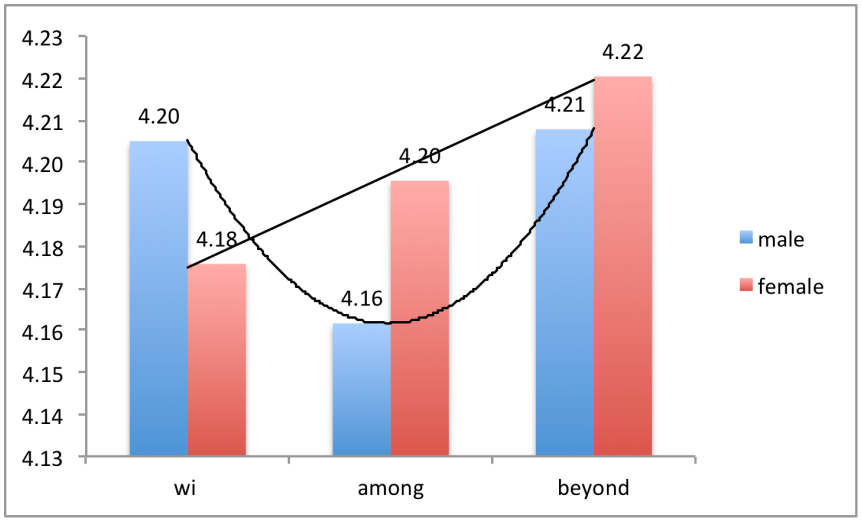
The evidence suggests that there are no "extreme" negative response distributions. The category (% = 1 or 2) has a maximum value of 4.0% for End a2 (*Reach out to one another across differences and stand together in the face of injustice*). The End b5 (*Participate actively in the larger UU community*) has the largest percent in the (% <= 3) category at 21.5%, the majority of those responses being "3".

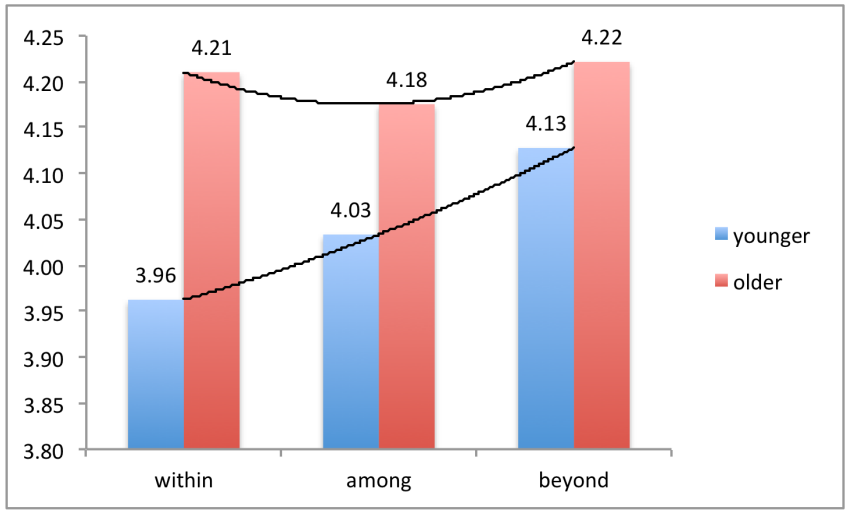


Something New This Year – *Beyond* is Highest Scoring Area









Re: lower Ends evaluations this year vs. 2016. Two considerations:

(1) Last years survey was Spirit Map free – asking for Spirit Map ratings prior to Ends evaluations could have a “dampening” effect.

(2) The world we live in has changed significantly. For many in this congregation this world is considerably more worrisome...less sanguine. Anecdotal evidence is easy to find. More formally this is found in a APA survey as reported in TIME.

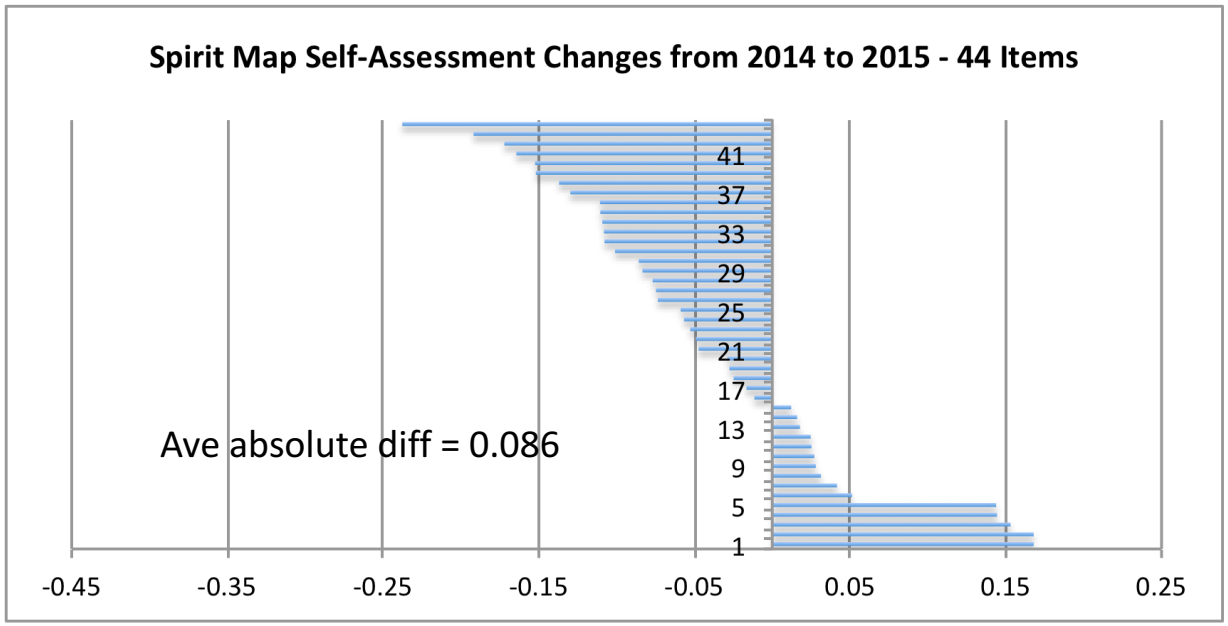
TIME
The Emotional Divide of Trump’s Presidency

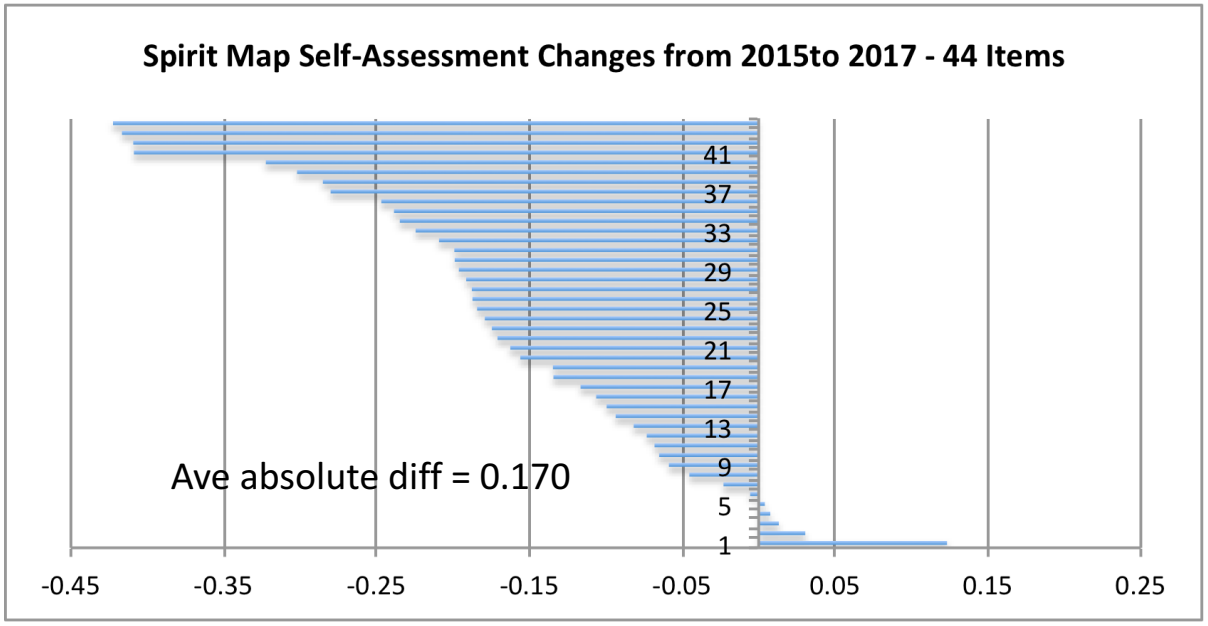
“The unease haunts the crosstabs of public-opinion surveys: in an American Psychological Association (APA) poll released on Feb. 15, 6 in 10 Americans call the current political environment a source of "significant stress" for them. In the 2016 presidential campaign and its aftermath, the APA poll found the first statistically significant increase in stress levels since it started asking 10 years ago.”

Kale Vick
Feb 16, 2017

Does our survey provide any evidence of this “significant stress”?

Is There Evidence of a Trump Effect?





Spirit Map Self-Assessment Ratings (how true is this item for me?) are the first things asked in the 2014, 2015, and 2017 surveys (they weren't asked in 2016). Changes in ratings would not be due to methodological reasons.

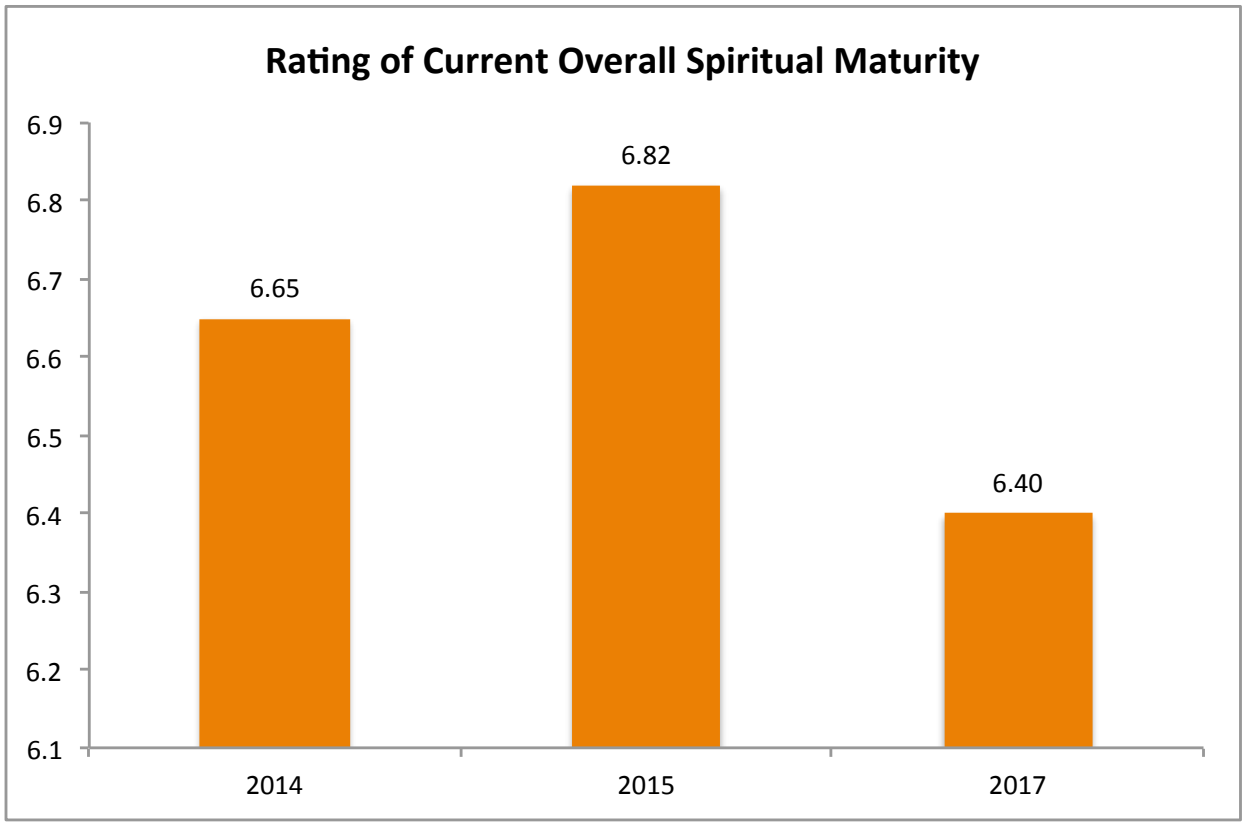
Changes from 2014 to 2015 (top chart) are relatively small - some are negative, some are positive – and they average in absolute terms 0.086.

In contrast the changes from 2015 to 2017 (bottom chart) are almost all negative (higher ratings in 2015 than 2017) and the average in absolute terms (0.170) is two times larger than the changes from '14 to '15.

Conclusion: we feel less good about our spiritual lives today than two years ago.

Hypothesis: this is due in large part to increased stress/anxiety felt by members of the congregation to do the current political climate.

And these lower individual item self-assessment ratings translate to lower overall assessments of spiritual maturity

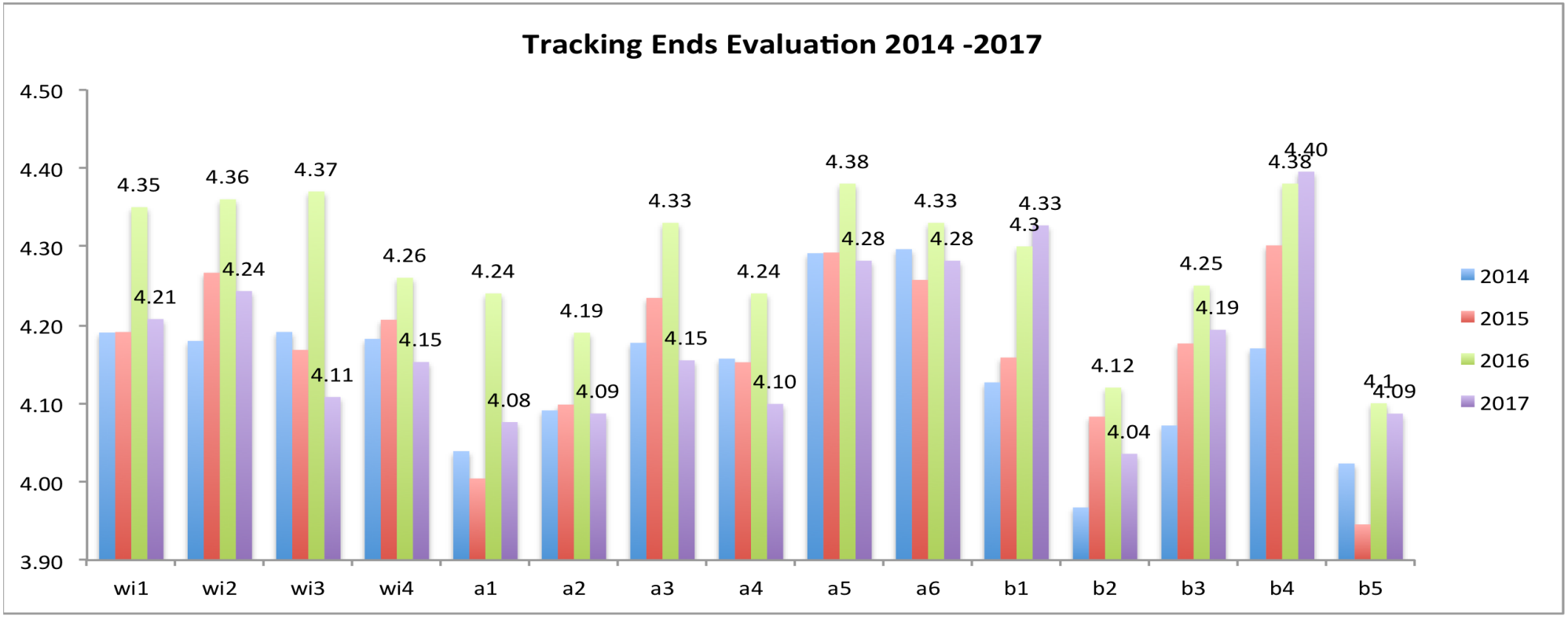


2017 rating different from the 2014/2015 ratings at 95% level of confidence.

(2014 and 2015 are different at the 80% level of confidence.)

So there are two things operating to make it more challenging for the Ends evaluations in 2017 to achieve similar levels to those of 2016: (1) Spirit Map assessments and (2) a significant change in the political climate.

Tracking Ends Performance 2014 - 2017



Rank Order of Differences	2017-2014
b4	0.23
b1	0.20
b3	0.12
b2	0.07
wi2	0.06
b5	0.06
a1	0.04
wi1	0.02
a2	0.00
a5	-0.01
a6	-0.01
a3	-0.02
wi4	-0.03
a4	-0.06
wi3	-0.08

Rank Order of Differences	2017 - 2016
b1	0.03
b4	0.02
b5	-0.01
a6	-0.05
b3	-0.06
b2	-0.08
a5	-0.10
a2	-0.10
wi4	-0.11
wi2	-0.12
a4	-0.14
wi1	-0.14
a1	-0.16
a3	-0.18
wi3	-0.26

'17–'14 differences >= 0.113 are significant at the 95% level of confidence

'17–'14 differences >= 0.074 are significant at the 80% level of confidence

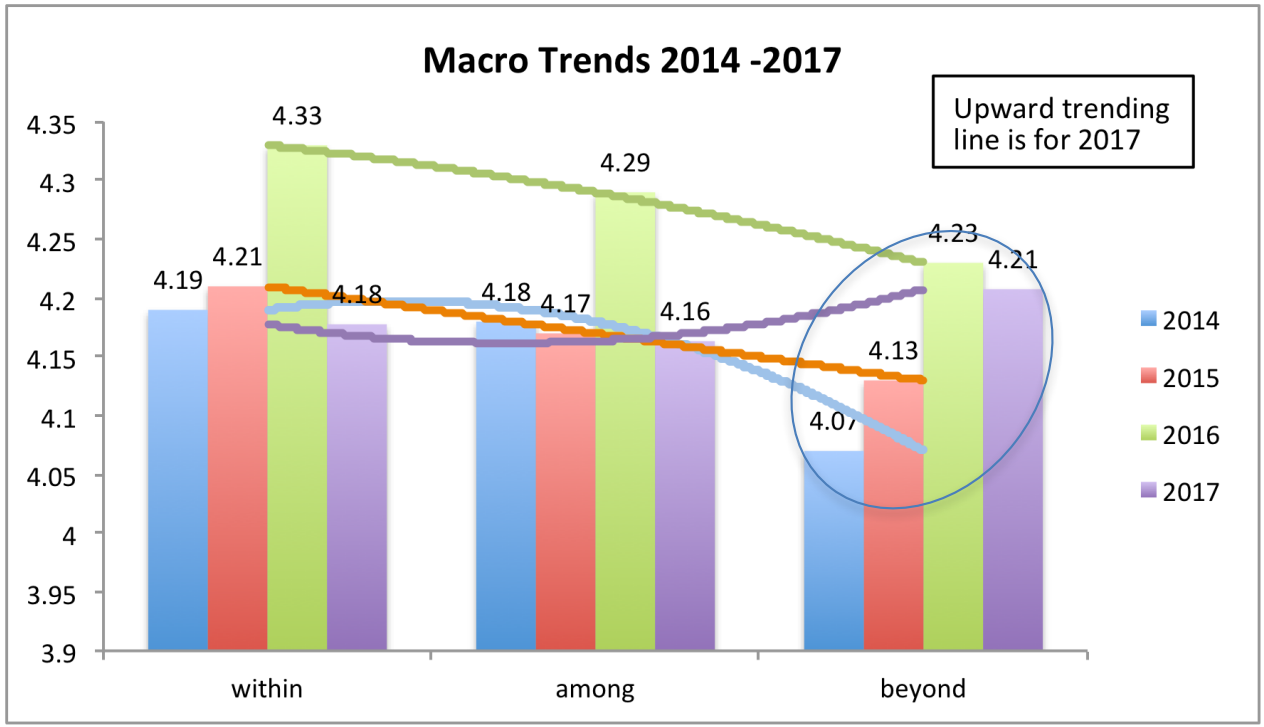
'17–'16 differences >= 0.109 are significant at the 95% level of confidence

'17–'16 differences >= 0.071 are significant at the 80% level of confidence

Some part of drop off in 2017 v. '16 attributable to political environment and/or inclusion of Spirit Map section.

Even with a more negative political environment 2017 results have mostly positive significant and/or directional comparisons with 2014 especially in the Beyond area. 2017 results compare favorably with '16 in the Beyond area as well.

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



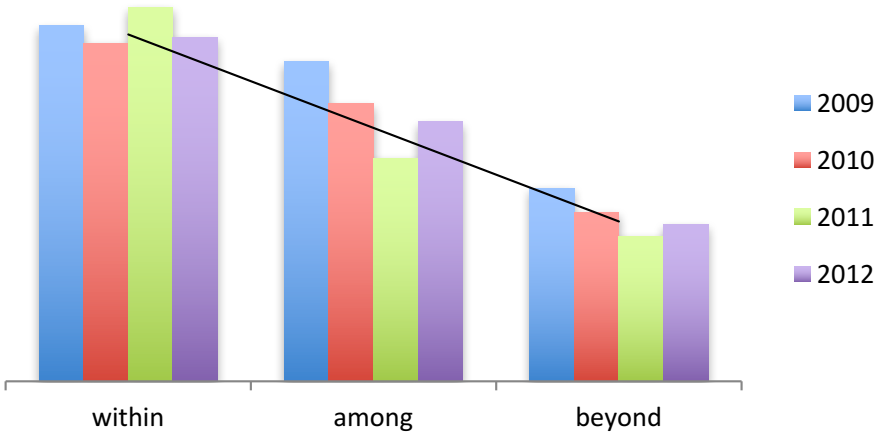
This year's trend is different – Beyond highest; in prior years always the lowest.

Beyond End shows sustained upward movement 2014 – 2017.

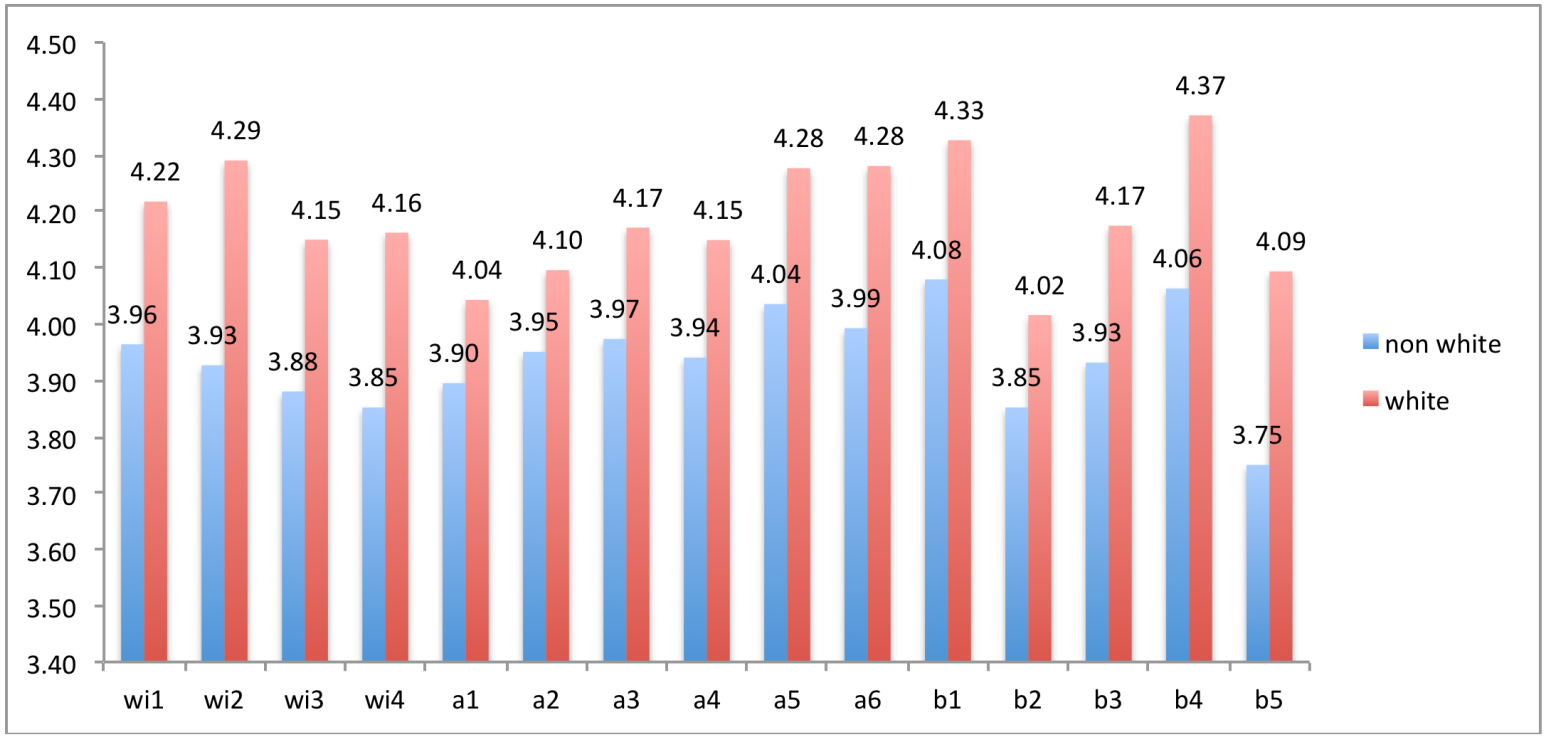
Macro Beyond as high or higher than any macro ex 2016.

Biggest Beyond gains 2014 – 2017 for:

b4 Serve as a trusted and visible leader, partner, and advocate for the creation of a just society and a sustainable environment
b1 Open our door and our hearts to those who seek comfort, courage, and meaning
b3 Live out our commitment to racial reconciliation and to dismantling racism



Evaluation of Ends Statements by Family Type (family of color/white) - 2017



Rank Order of Differences

	2017 (nw - w)
wi2	-0.36
b5	-0.34
wi4	-0.31
b4	-0.31
a6	-0.29
wi3	-0.27
wi1	-0.25
b1	-0.25
b3	-0.24
a5	-0.24
a4	-0.21
a3	-0.20
b2	-0.16
a1	-0.15
a2	-0.15

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 = 18%
Percent white family = 71%
no answer = 11%

Family of color ratings continue lower and differences are greater this year than in '16. Families of color more impacted by current political climate?

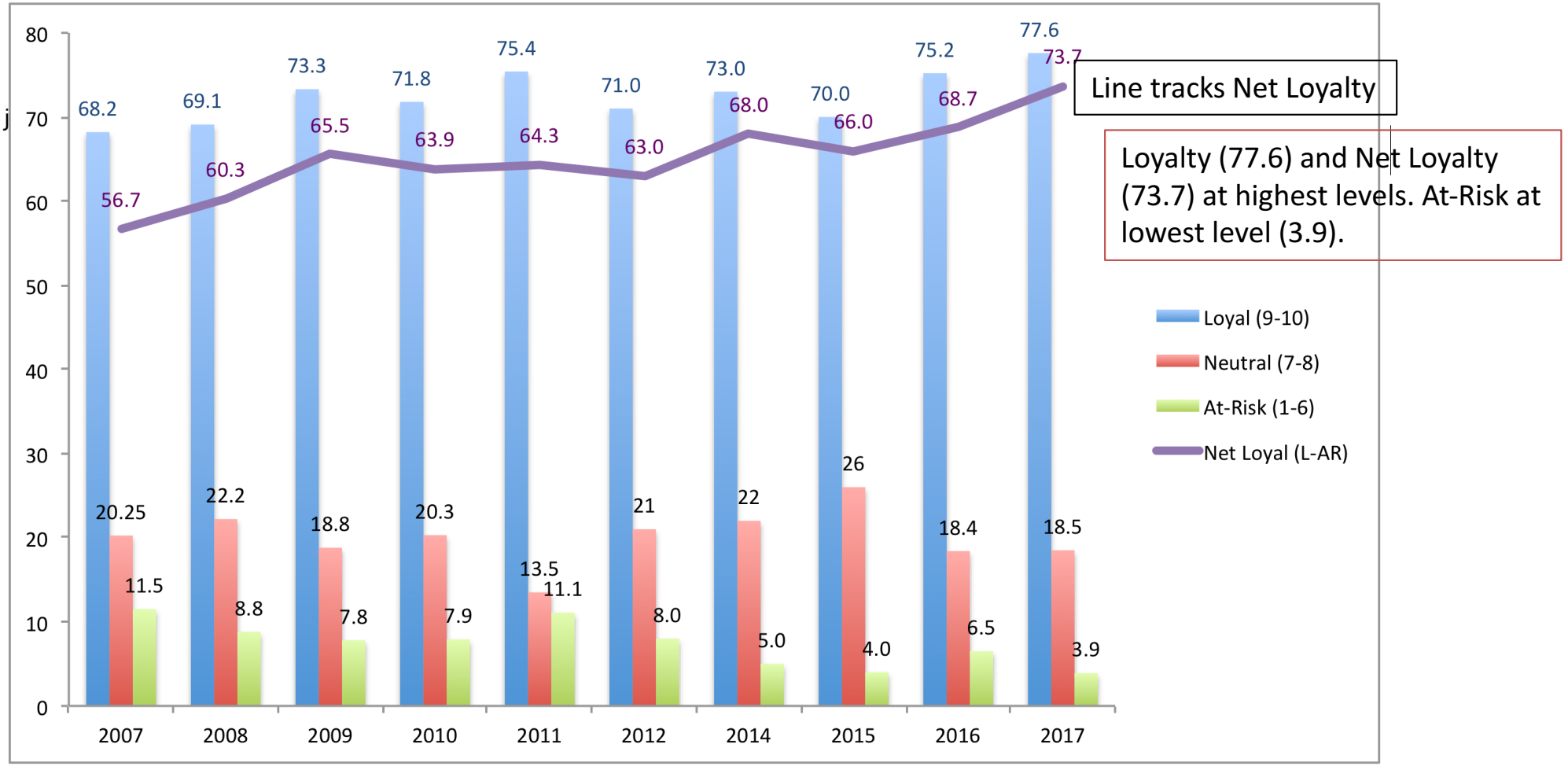
Rank Order of Differenes

2016	diff(nw - w)
b3	-0.29
b5	-0.26
wi2	-0.20
b4	-0.18
b2	-0.17
a5	-0.15
a3	-0.14
a1	-0.13
wi1	-0.13
b1	-0.12
a4	-0.08
a6	-0.08
a2	-0.05
wi4	-0.02
wi3	0.00

	Do you have children living at home?			
	None	Age <= 6	Age 7 - 12	Age 13 -18
white	72.2%			
families of color	58.3%			

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

Program/Activity Impact on Spiritual Maturity - 2017

Sunday Worship, Pilgrimage, and Music top the list.

Program/Activity	Percent Participating	Impact on SM
Attending Sunday Worship	89%	4.36
Pilgrimage	11%	4.29
Music	27%	4.22
Children's Religious Education	28%	3.83
Pastoral Care	19%	3.75
Other Worship and Meditation Programs	48%	3.64
Adult Religious Education	58%	3.62
Administrative Ministry	26%	3.58
Community Outreach	42%	3.56
Fellowship	25%	3.40
Reading and Writing	37%	3.40
Food Ministry	21%	3.36

What Do Comments Tell Us?

Three themes:

1. Yearning for connection across difference.
2. Personal responsibility for a deeper connection to church.
3. Church programs contribute to spiritual growth.

Spirit Map

- Spirit Map is a survey-based instrument and analysis procedure that helps individuals and congregations find their inherent spiritual strengths and discover opportunities to deepen their sense of peace, compassion and joy…to help us "become one with the daring leap into transcendence."

- Survey elicits two ratings about each of 44 items related to the domain of Spiritual Maturity (e.g. *I believe my life has meaning and purpose, I act with the interests of others in mind*). The two ratings provided by an individual about each of the 44 items are:
  - Self-assessment rating: how true is this statement for you (1 – 10 scale where 1 = not at all true and 10 = totally true) and,
  - Importance rating: how important is this statement to your spiritual maturity (1 – 10 scale where 1 = relatively least important to your spiritual maturity and 10 = relatively most important to your spiritual maturity)?
- In addition to these responses, our survey asks respondents to provide an estimate of their overall spiritual maturity both now and in five years (optional). This question is asked following the individual's exposure to the 44 items.

Top Five Key Opportunities and Signature Strengths - UCU 2017

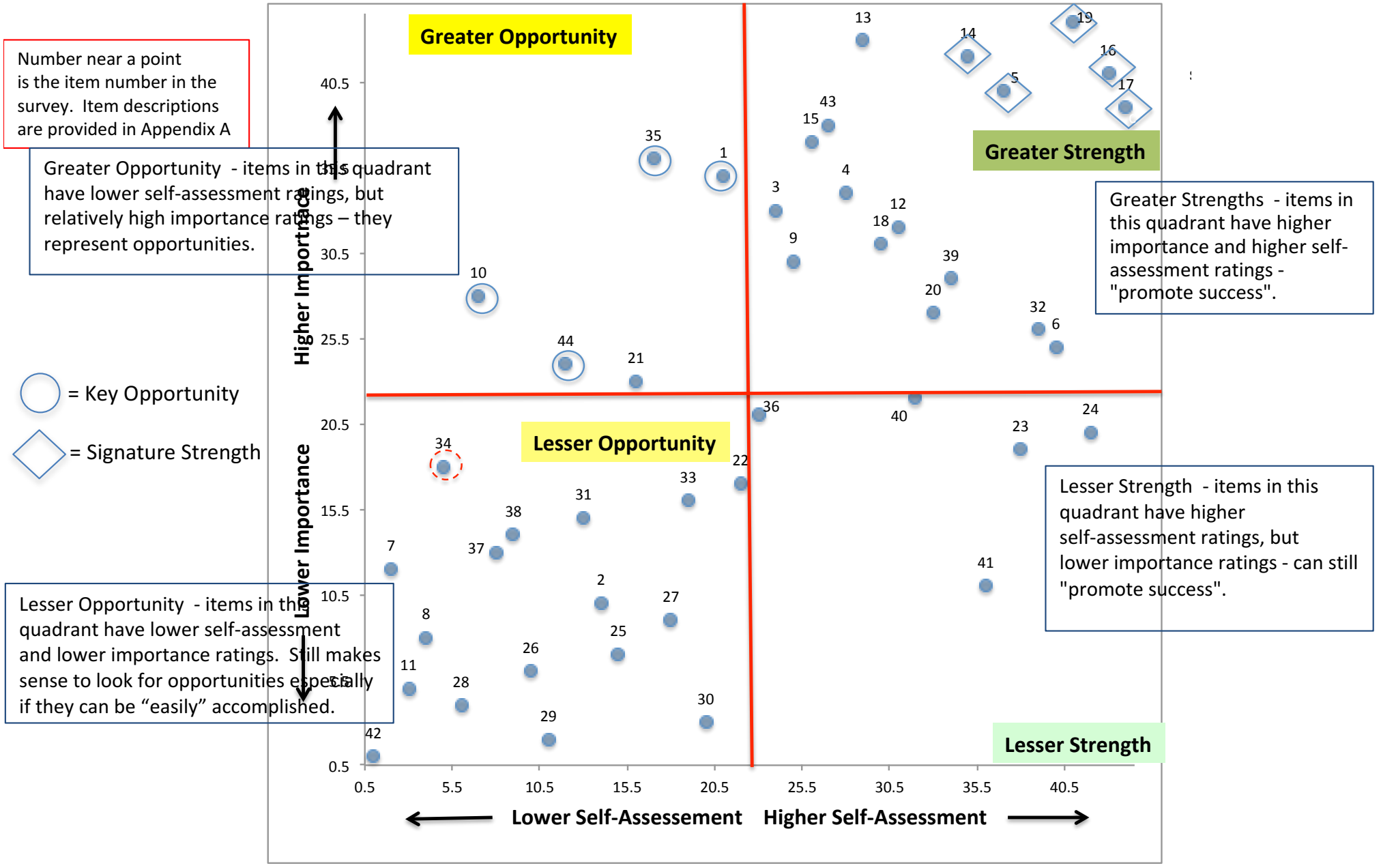
Signature Strengths (relatively high self-assessment; relatively high importance)

19 *I act with integrity.*
16 *I care deeply about the welfare of others.*
17 *I believe it matters what I do.*
5 *I seek opportunities to learn and grow.*
14 *I take responsibility for the consequences of my actions, even those that are unintended.*

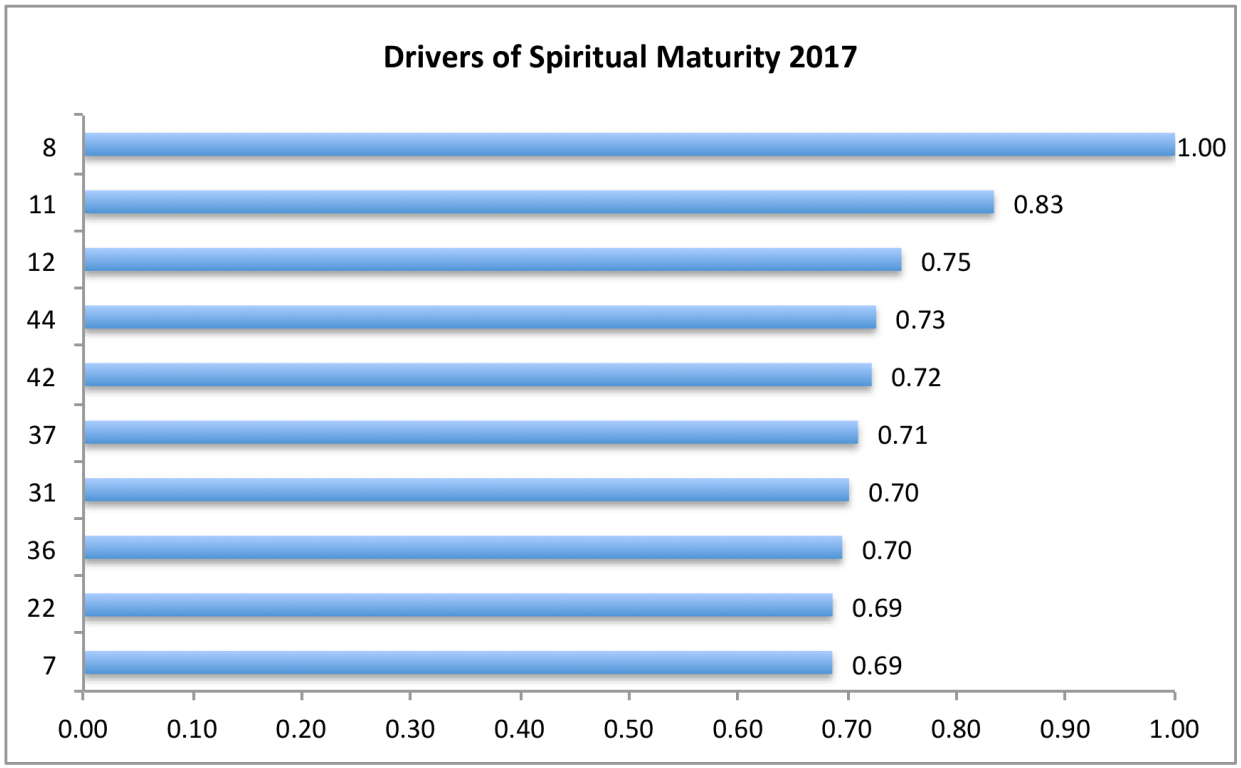
Key Opportunities (relatively lower self-assessment; relatively high importance)

10 I give to others fully and generously.
35 I'm able to adapt when things do not turn out the way I want.
1 I see beauty all around me.
44 I can be in the presence of my own or another's pain without needing to flee or fix it.
34 I make good decisions about when to act.

Quadrant Map – a graphical display of the 44 SM items with *self-assessment* and *importance* rankings forming the two axes of the graph - UCU 2017



Drivers of Spiritual Maturity – Which of the 44 individual Spirit Map items are most correlated with Overall Spiritual Maturity?
Chart shows the top 10 items



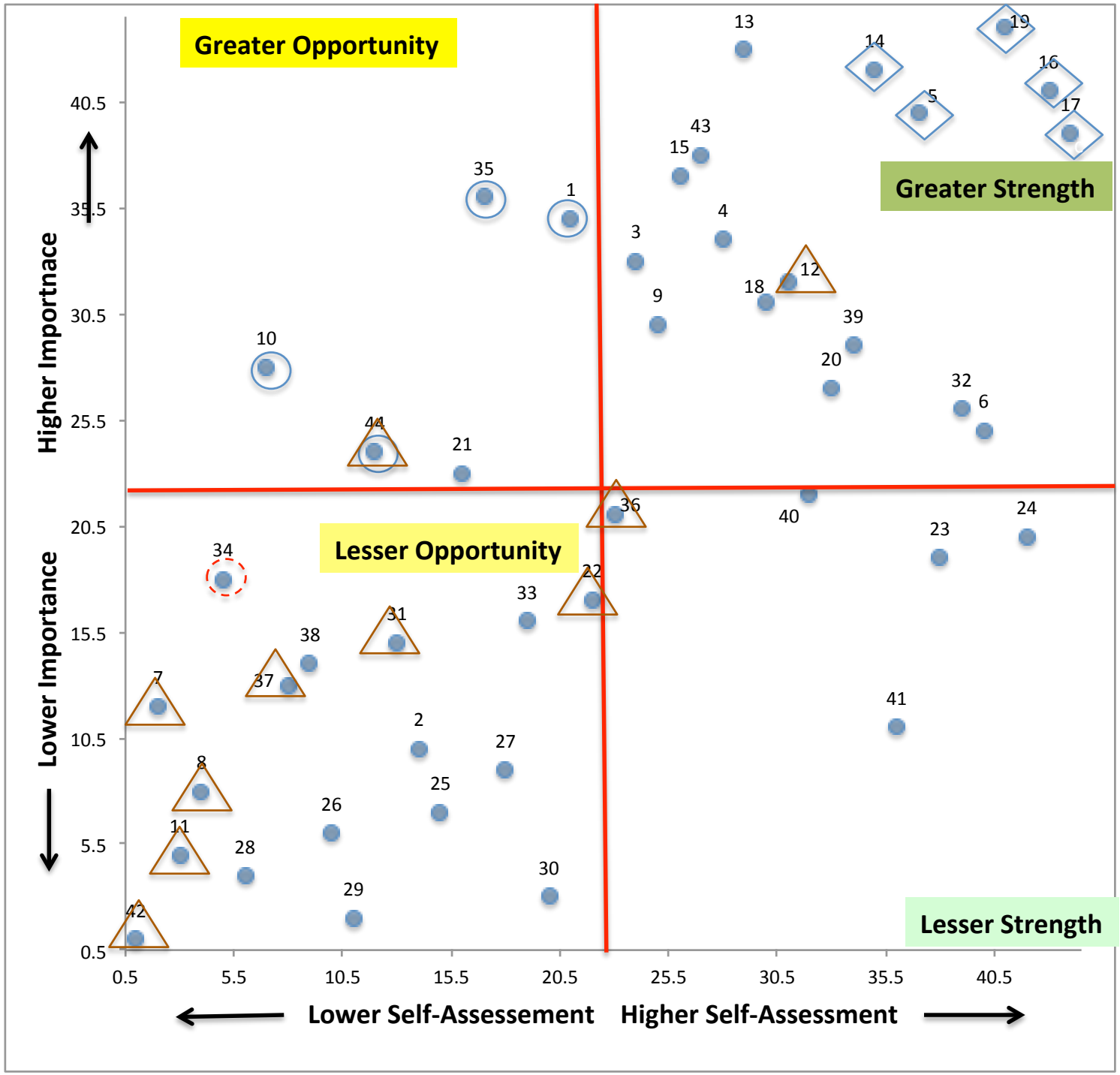
* Numbers are indices and are a function of a item's correlation with the overall measure of SM. Item with the maximum correlation is given a value of 1.00; other numbers represent the ratio of an item's correlation to that of the item with the max correlation.

These items are displayed on the Quadrant Map on the next slide.

8 I actively practice my spiritual or religious faith.
11 I act in a spiritual manner.
12 I am reflective.
44 I can be in the presence of my own or another's pain without needing to flee or fix it.
42 I act in a religious manner.
37 I have the ability to repent, forgive myself, and change.
31 I act with awareness of my place in the interconnected web of existence.
36 My spiritual growth is important to me.
22 I am mindful of my emotions.
7 I have a clear purpose to my life and am able to articulate that purpose to both myself and others.

Quadrant Map with Key Opportunities, Signature Strengths, and Drivers of Spiritual Maturity Identified

△ = Driver of SM



Deeper Analysis: Spirit Map Opportunities and Strengths, and Drivers of Spiritual Maturity

- Driver items do not show up as SS or KO with the exception of item 44 (*I can be in the presence of my own or another's pain without needing to flee or fix it*) a KO which underscores this item's priority for attention.

- Despite generally not being SS or KO, all Drivers except item 12 (*I am reflective* – in the Greater Strength quadrant) are in an Opportunity quadrant (item 36 is essentially borderline Opportunity/Strength). So with the exception of item 12 all Drivers of Spiritual Maturity are Spirit Map Opportunities.

- Four of the Drivers deal directly with spirituality (8, 11, 42, 36; 8 and 11 are the top two Drivers). These items are Spirit Map Opportunities just Lesser ones because of their relatively low rated importance. Some reflection on the reason for the relatively low rated importance might prove valuable. In addition to working on improving self-assessment on these related items (or a subset of them) is it worth trying to nudge these items (or a subset) to higher levels of recognized/stated importance?

Deeper Analysis: Spirit Map Opportunities, Strengths, and Drivers of Spiritual Maturity(con't)

- Two Spirit Map items talk about meaning and purpose in one's life:
  - 43: I believe my life has meaning and purpose.
  - 7: I have a clear purpose to my life and am able to articulate that purpose to both myself and others.

  Item 7 is a Driver of Spiritual Maturity.

  On the Quadrant Map:
  - 43: is in the Greater Strength quadrant
  - 7: is in the Lesser Opportunity quadrant

  In other words, people's belief in meaning and purpose is stronger than their ability to articulate it. Even though congregants rated item 7 as relatively less important in their spiritual lives (and perhaps that's because they recognize they aren't very good at articulation of purpose), because it's a Driver you may still decide to develop it. If you do, the fact that congregants have a belief in the meaning and purpose of life, and find that belief important, should motivate congregants to work at articulating that meaning and purpose.

- Drivers 22 (*I am mindful of my emotions*), 31 (*I act with awareness of my place in the interconnected web of existence*), and 37 *(I have the ability to repent, forgive myself, and change*) are also Spirit Map Opportunities. They are in the Lesser Op quadrant because of the relatively low importance ratings assigned to them. No reason not to pursue improvement initiatives on these items if consistent with Ends and general church culture especially if Signature Strengths can be helpful in moving the self-assessment needle. For example: Signature Strength item 5 (*I seek opportunities to learn and grow*) item could help in an improvement effort directed at Driver/Opportunity item 31 (*I act with awareness of my place in the interconnected web of existence).*

Follow up requests for 2017 Congregational Survey

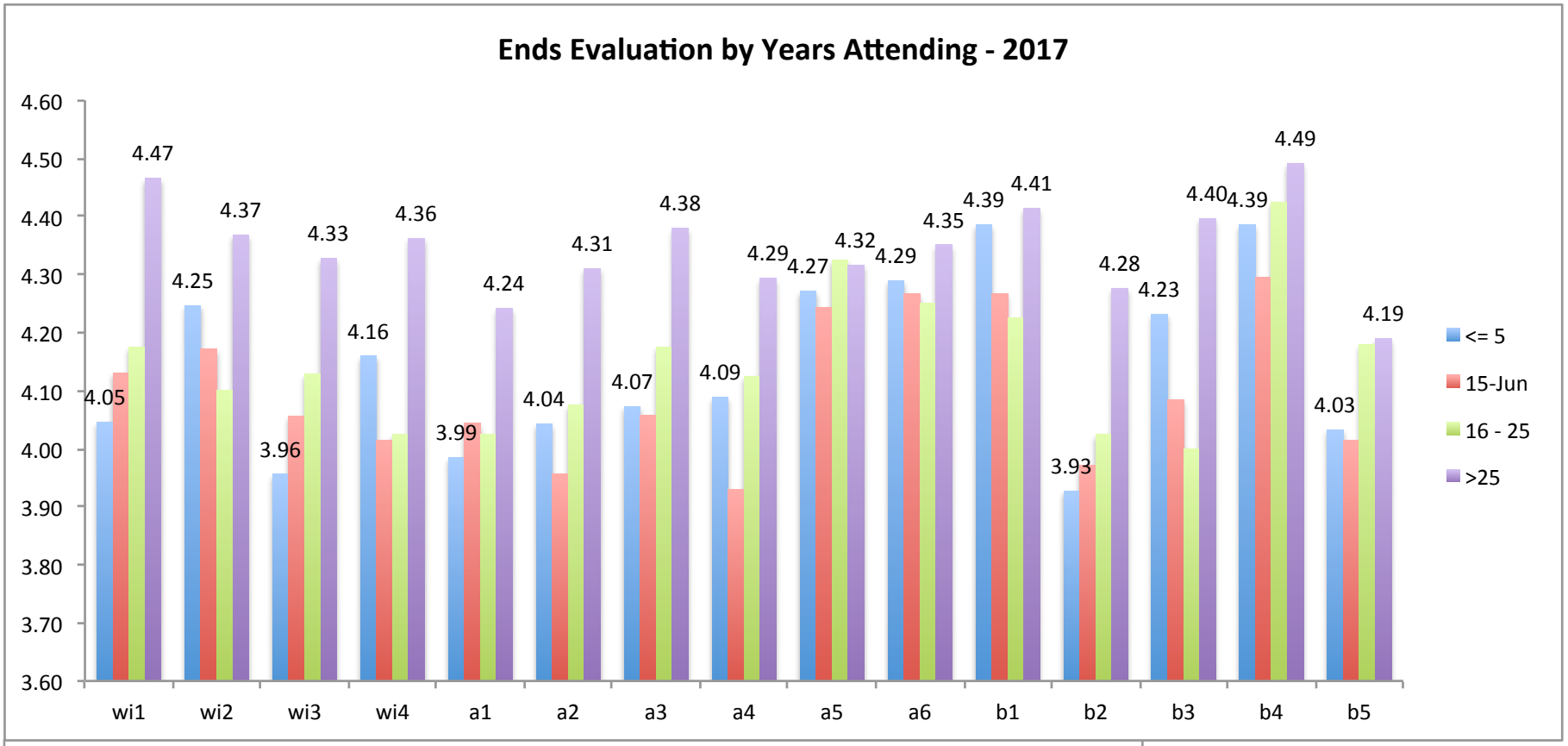
The following slides show Ends evaluation results for various subgroups.
There are four sets of evaluations – one per slide.

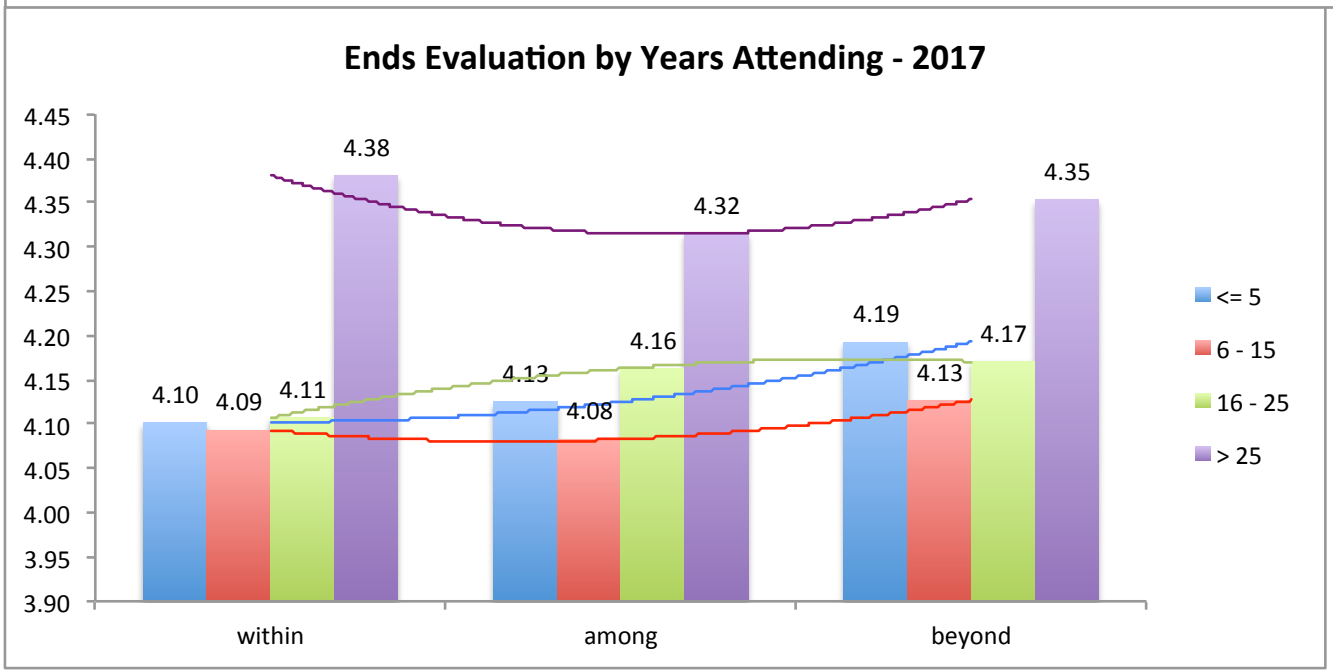
- by number of years attending
- by families with children under 18 vs. families with no children under 18
- by worship attendance in a typical month
- by pledging vs. non-pledging households

For all subgroups the macro Beyond Evaluation is as high or higher than the Among or Within Evaluation with the exception of the subgroup representing those attending for more than 25 years (W = 4.38, A = 4.32, B = 4.35). This reverses the previously observed pattern where the Beyond Evaluation is the lowest.

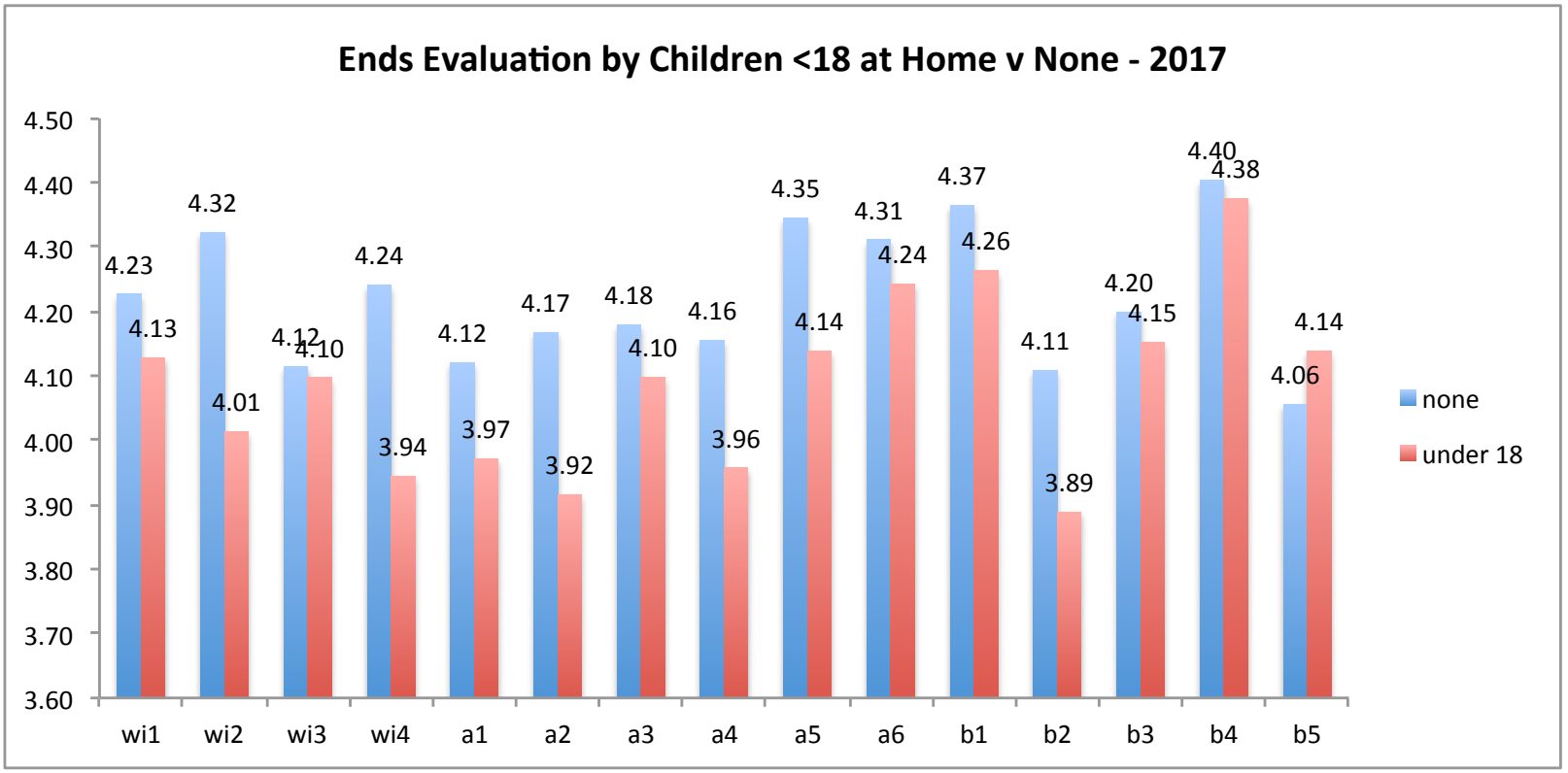
The macro Beyond Evaluations show the most agreement (least variation) among any given set of subgroups; Within shows the least agreement (most variation) except for worship attendance where Among has slightly more variation than Within.

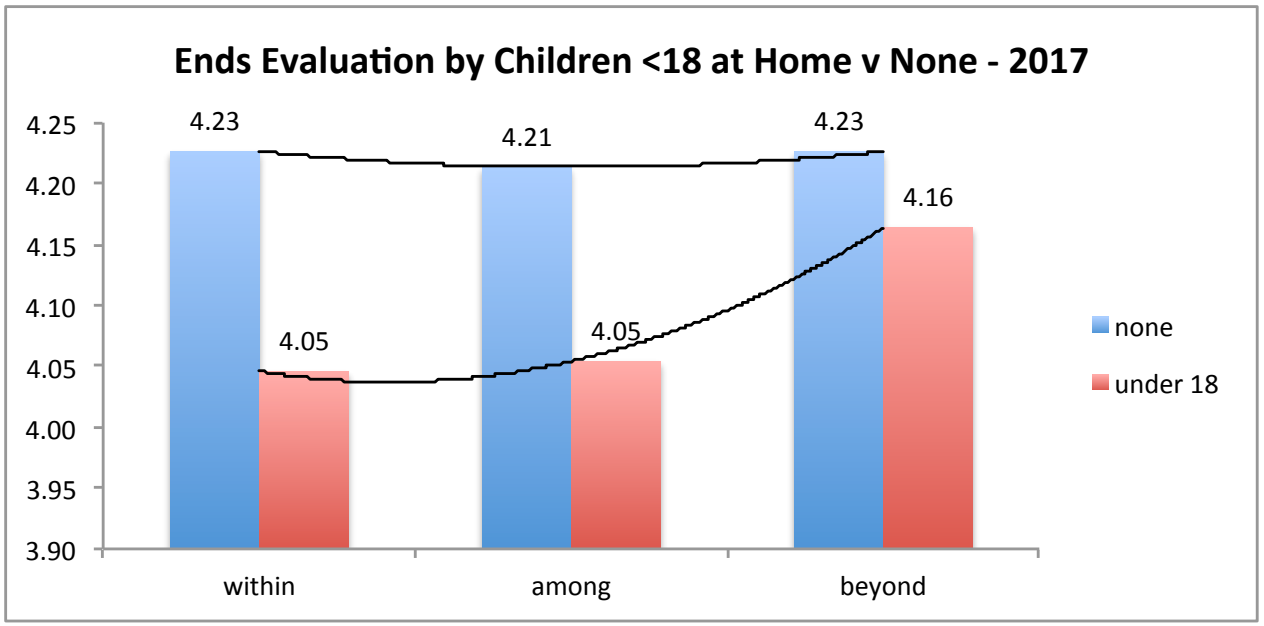
All macro evaluations for all subgroups are positive (>= 4.0) with the exception of the Within evaluation for the "No Pledge" subgroup (= 3.90) (this subgroup is a very small sample size.



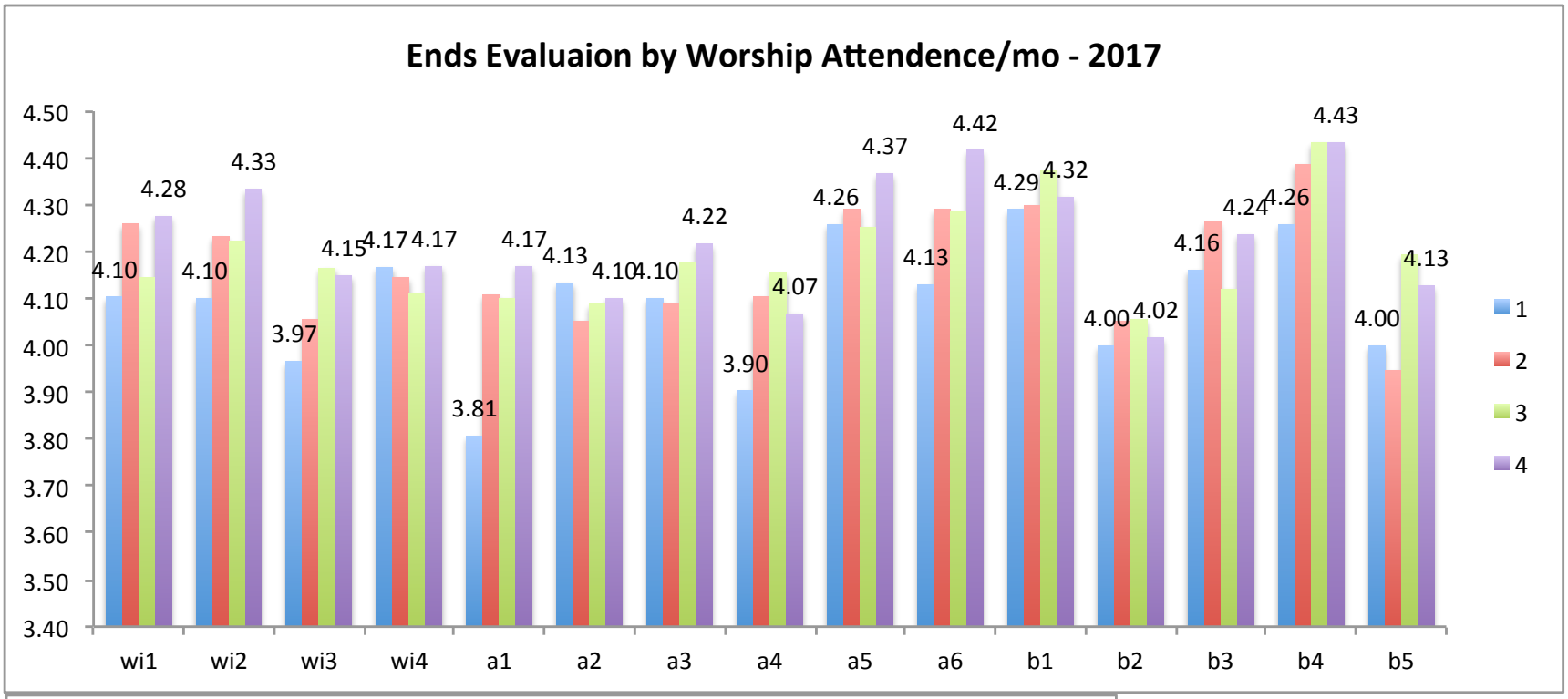


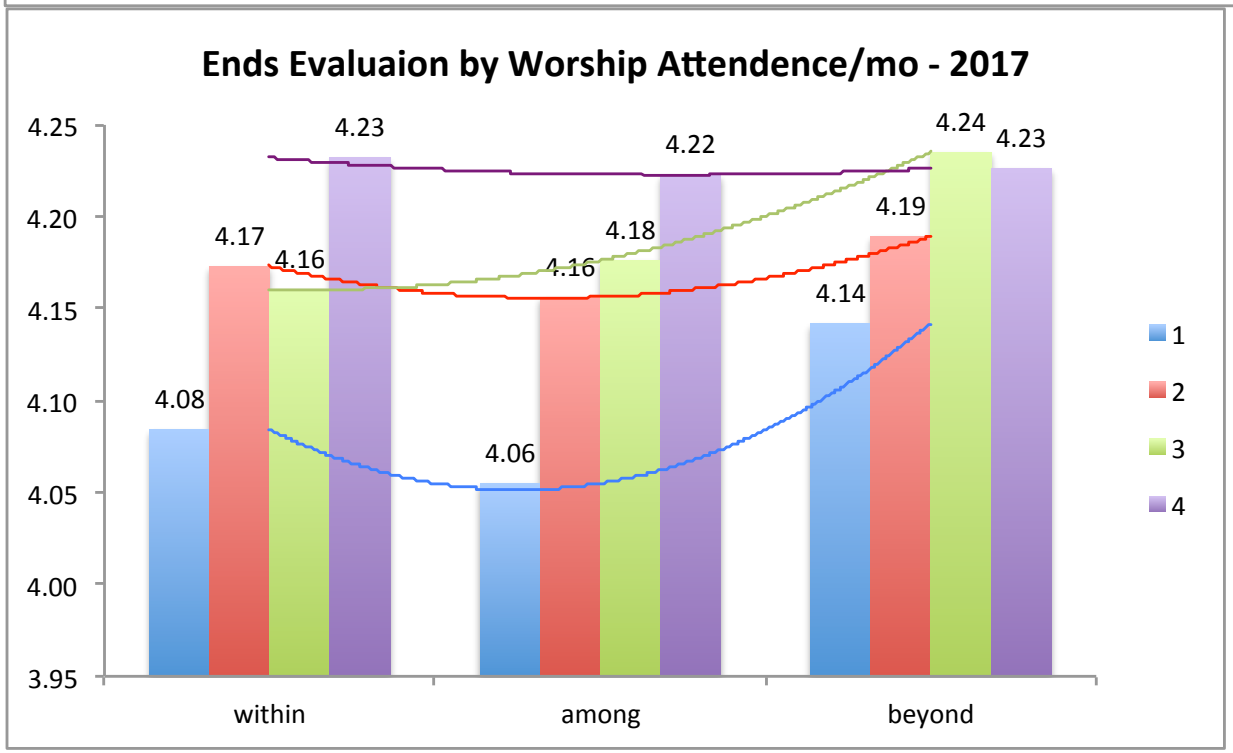
percent	caategory
25.7%	<=5
26.1%	6 - 15
15.1%	16 - 25
21.3%	> 25
11.8%	na



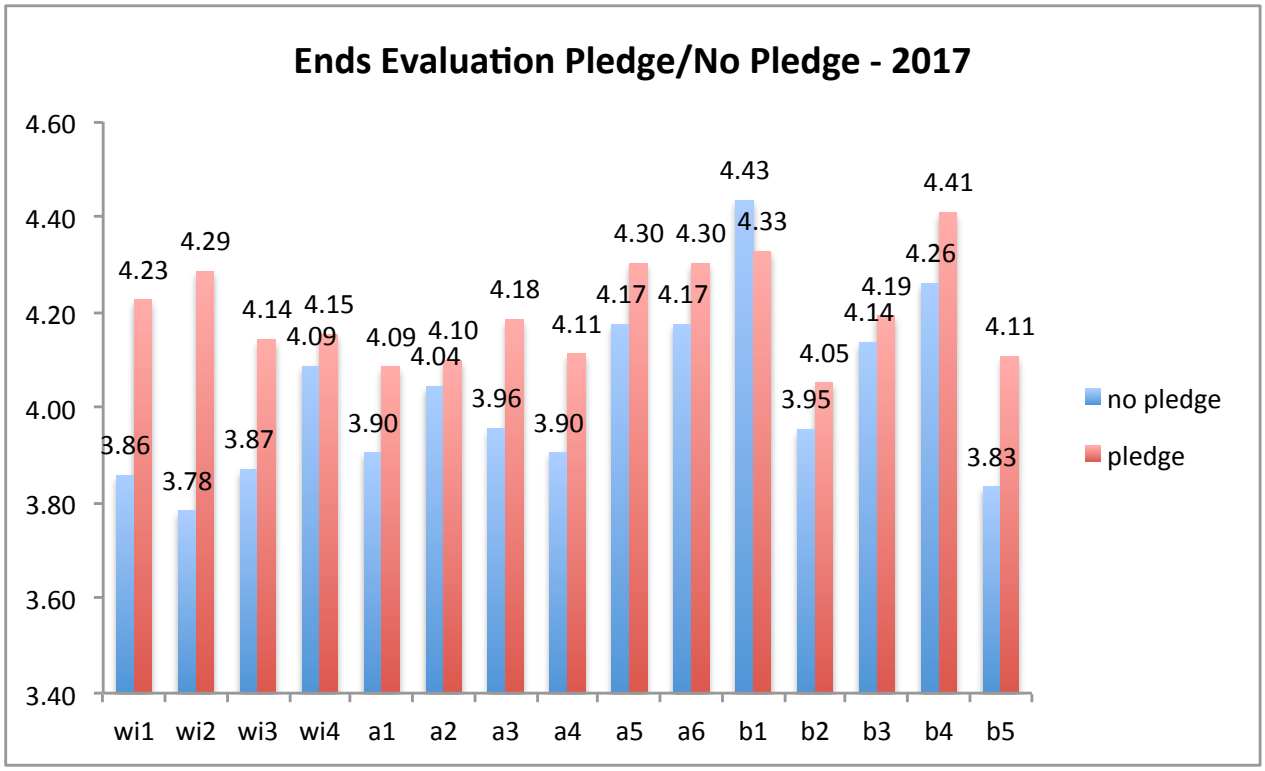


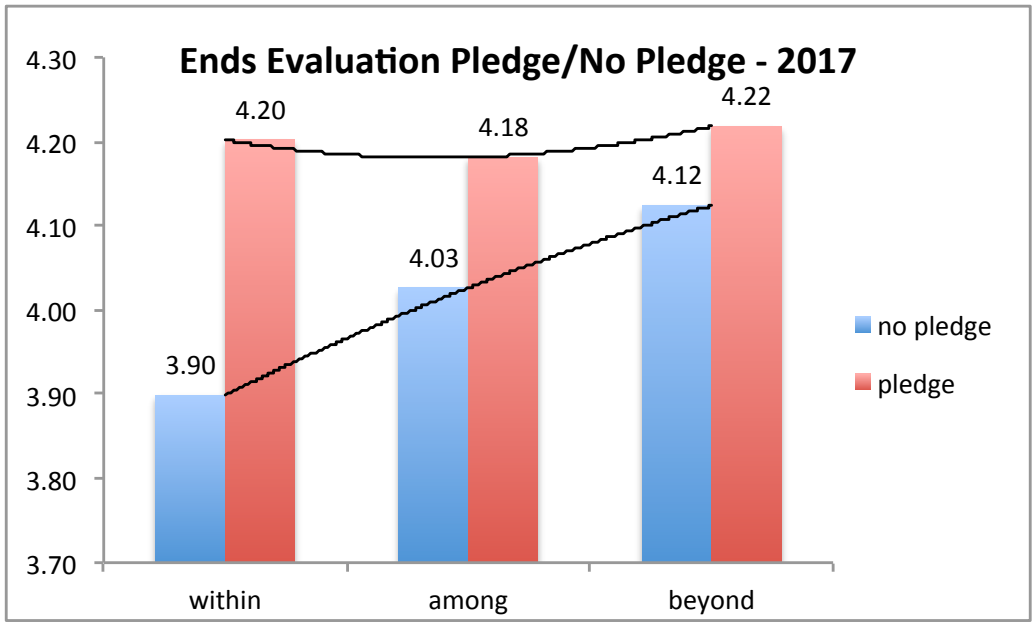
percent	category
63%	none
26%	kids under 18
11%	na





percent	category
12%	1
21%	2
33%	3
22%	4
11%	na





category	percent
Yes	79%
No	9%
na	12%

caution: "No" category represents a small sample size

Appendix – 2014 Ends Statements

w/I 1	Open ourselves to compassionate pastoral care in times of joy, sorrow, and transition
w/I 2	Develop spiritual practices that nurture reverence and encourage diverse worship services rich in beauty, serenity, community and joy
w/I 3	Embrace our identity as Unitarian Universalists and live out the principles of our shared faith in our daily lives
w/I 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.

Appendix – Spirit Map Items

1 I see beauty all around me.
2 I think about my place in the universe.
3 I delight in experiences both great and small.
4 I feel part of something larger than myself.
5 I seek opportunities to learn and grow.
6 Leading a moral life makes me happy.
7 I have a clear purpose to my life and am able to articulate that purpose to bot
8 I actively practice my spiritual or religious faith.
9 I seek harmony with others.
10 I give to others fully and generously.
11 I act in a spiritual manner.
12 I am reflective.
13 I am respectful of the feelings, actions, and opinions of others.
14 I take responsibility for the consequences of my actions, even those that are u
15 I act in an authentic manner.
16 I care deeply about the welfare of others.
17 I believe it matters what I do.
18 I act with the interests of others in mind.
19 I act with integrity.
20 I am self-aware.
21 I freely and intentionally give my time and energy to others.
22 I am mindful of my emotions.
23 I see something universal in all human struggle.
24 I accept ambiguity as inherent in life.
25 Awareness of my mortality informs how I live my life.
26 Having good boundaries allows me to act with intention.
27 Even though I cannot know exactly what will happen, the promises I make give
28 I perceive and respond to truth that is expressed in myth or poetry.
29 I appreciate the beauty and power of religious symbols and rituals other than r
30 I am aware of some of the limitations or paradoxes of my own preferred religic
31 I act with awareness of my place in the interconnected web of existence.
32 I am curious to learn more about how the world around me works.
33 I can tell the difference between what I am responsible for, and what I do not c
34 I make good decisions about when to act.
35 I'm able to adapt when things do not turn out the way I want.
36 My spiritual growth is important to me.
37 I have the ability to repent, forgive myself, and change.
38 I can ask for and accept forgiveness.
39 I experience awe.
40 I am able to exercise power without corruption.
41 I can give loyalty to another's leadership without losing my integrity.
42 I act in a religious manner.
43 I believe my life has meaning and purpose.
44 I can be in the presence of my own or another's pain without needing to flee o