

Results of 2024 Congregational Survey
Unity Church Unitarian

Nov 24, 2024

Agenda

- Survey Structure
- Key takeaways from the survey
- Evaluation of Ends Statements
 - Evaluation of Ends: 2024
 - Tracking Ends Performance: 2019 - 2024
 - Ends: Quadrant Map based on Performance, Importance, Motivation Ratings
 - Ends Evaluation by: age and gender
- Segments Based on Importance of Ends (2 and 3 segment solutions)
- Loyalty Tracking: (1) Total, (2) by Age, (3) by Gender
- Evaluation of Programs and Activities
- Sample characteristics
- What do comments tell us?

Congregational Survey Structure

1. Ends Statements/Loyalty

- a. Ratings on 8 current Ends Statements: Performance, Importance, Motivation
- b. Loyal/at-risk evaluation –“Would you recommend UCU to a friend or relative”
- c. Optimism about future
- d. Connection with “virtual” church
- e. Program/Activity Evaluation of impact on spiritual well-being

2. Elicitation of views (open end) on Hopes for Unity: Overall, Within, Among, Beyond

2. Demographic information

We asked open-ended demographic questions to elicit people’s demographic story as they themselves would tell it.

3. Comments

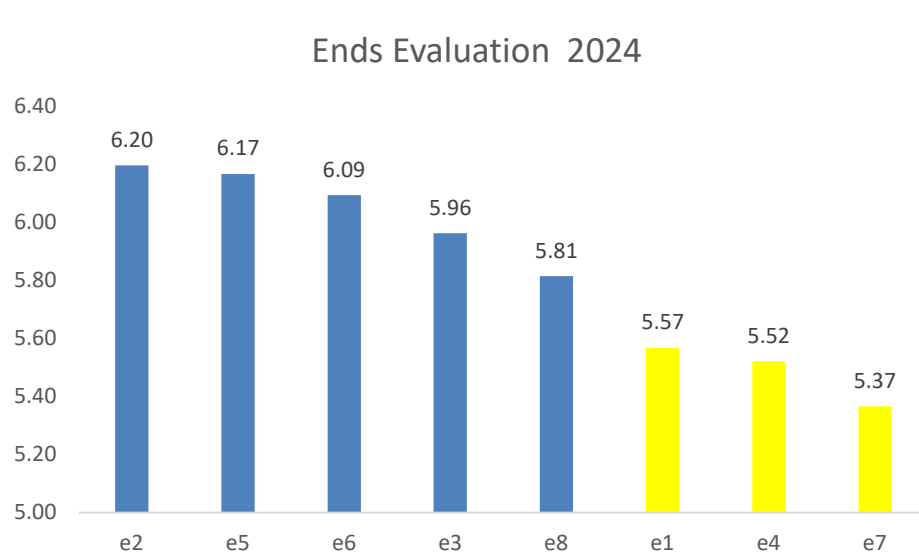
At three points in the survey, we ask for open-ended comments:

- After the ends evaluation
- After each program/activity section
- After the demographic information

Key Takeaways from the Survey - 2024

- Ends Evaluations and Tracking (slides 5 and 6)
 - Over the period 2019 – 2024 the End with the largest gain is E1; there are more moderate positive gains for Ends 2, 4, 5, and 6. E8 has a modest negative trend over this time period. Ends 3 and 7 are essentially flat.
 - There are two major grouping of the Ends in terms of their evaluation patterns over the period '19 – '24. Ends 1, 2, 4, 5, and 6 are at a pretty consistently higher level than the Ends 3, 7, and 8.
- A Quadrant Map, which combines End's rankings for Progress, Importance, and Inspiration-to-Contribute, indicates particular strength (relatively high rankings for Progress and Importance) for Ends E5 and E6 and a particular opportunity (relatively low ranking for Progress and relatively high ranking for Importance) for End E4 (slide 7).
- Loyalty (-17%) and Net Loyalty (-22%) took a substantial hit in 2022 (and '23), vis-à-vis 2020, during our transition years, but a "reset" has occurred in 2024 (slide 8).
- The "Confidence in the Future" and the "Connection to the Church" metrics both show increasing trends over time and that is especially true for the Connection metric. (side 9)
- One segment of congregants places relatively higher importance on Ends 1, 7, and 6 and relatively less importance on Ends 3 and 8. In contrast, a segment of almost equal size (both segments about 50% of the sample) pretty much reverses these priorities placing relatively less importance on Ends 1 and 7 and relatively more importance on Ends 3, 2 and 5. This "2 segment solution" and a "3 segment solution" are explored on slides 10 and 11.
- The highest-ranking Programs/Activities in terms of impact on spiritual growth are pretty consistent across the years: Pilgrimage (when applicable), Music, and Regular Worship lead the way (slide 12).
- Sample Characteristics (to date)
 - Sample size in 2024 is in line with the historical average (slide 13).
 - Age in 2024 is in line with recent averages and continues upward trend (slide 14).
 - Ratio of Female to Male respondents in 2024 (2.18) mirrors long term average of a little more than 2 to 1 (slide 15).
 - There is a noticeable up-tick in the number of No Responses over the last three years.

Evaluation of Ends Statements – Averages



- Highest Ends are e2 and e5; lowest are e7, e4, and e1
- Ave for all Ends are in the Agree area (5.4 to 6.2), so they are all in positive territory.

Differences ≥ 0.14 are statistically sig at the 95% level of confidence.

$(e2, e5) > (e3, e8) > (e4, e7, e1)$

Rank Order of the Ends Evaluations

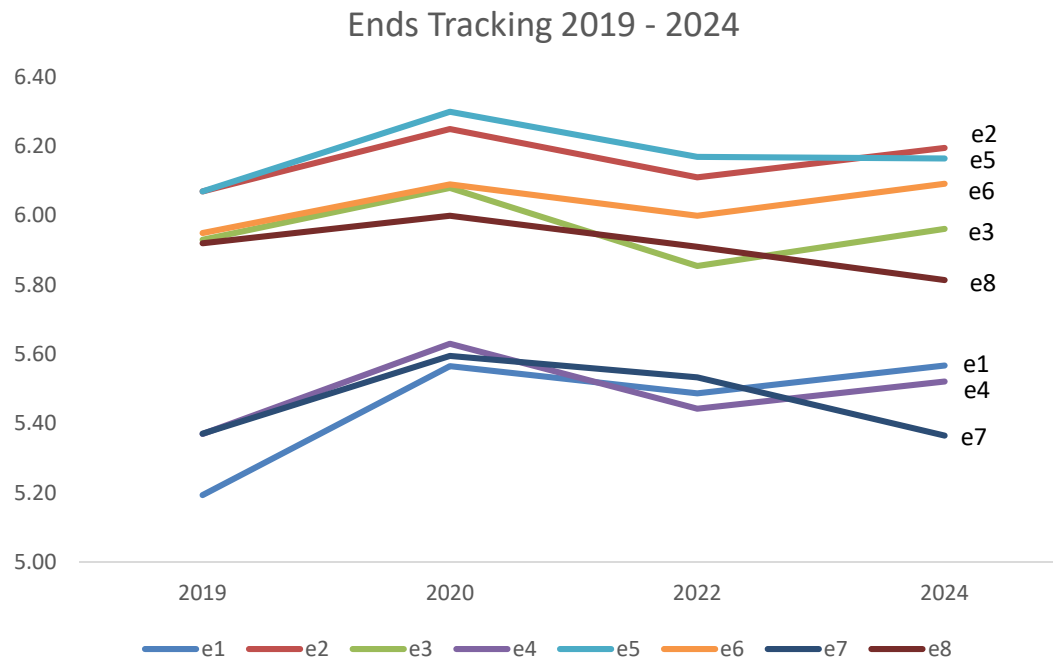
- e2 Ground ourselves in personal practice and communal worship that grows our capacity for wonder and spiritual deepening.
- e5 Generously give and openly receive compassionate care in times of joy, sorrow, and transition.
- e6 Discover and pursue our individual and collective work to advance justice, wholeness, and equity for people, our Earth, and all life on it.
- e3 Articulate our Unitarian Universalist faith identity, teach it to our children, share it with others, and live it courageously in the world.
- e8 Sustain and steward the church and our larger Unitarian Universalist movement for the future.
- e1 Create a multicultural spiritual home built on authentic relationships.
- e4 Know each other in all our fullness and create an ever-widening circle of belonging for all people.
- e7 Create brave space for racial healing and dismantling dominant culture.

Ends Tracking 2019 - 2024

Note

- 2021 and 2023 Ends results from MST survey not included
 - Ends evaluation not the focus; “buried” in the survey, COVID(21)

	'24-'19
e1	0.37
e4	0.15
e6	0.14
e2	0.13
e5	0.10
e3	0.03
e7	0.00
e8	-0.11



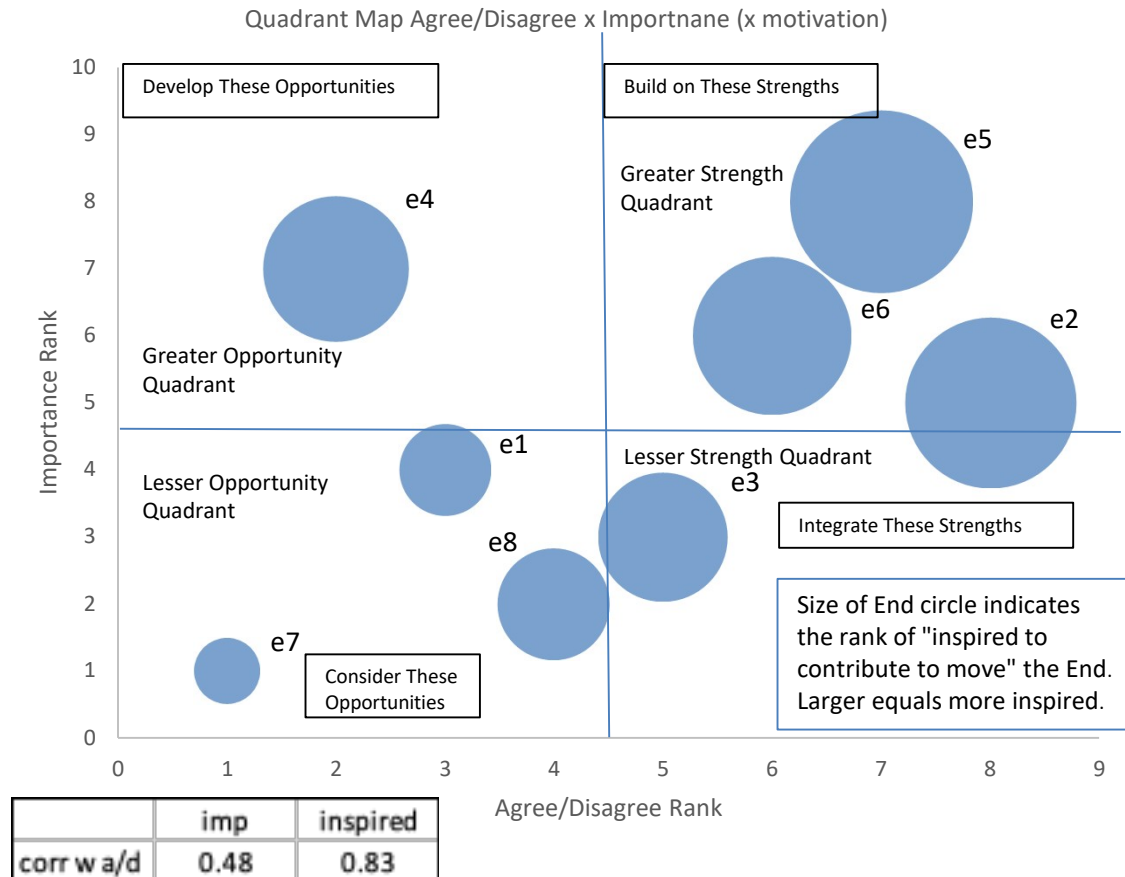
Key Observations (2024 v 2019)...

- Greatest gain: E1 (positive trend line)
- Next: E4, E6, E2 (positive trend lines)
- Flat: E3, E7
- Down: E8 (negative trend line)
- Statistically speaking...E1 gain statistically significant at the 95% level of confidence; E4, E6, E2 sig at the 90% level.

Rank Order of the Ends Evaluations - 2024

- e2 Ground ourselves in personal practice and communal worship that grows our capacity for wonder and spiritual deepening.
- e5 Generously give and openly receive compassionate care in times of joy, sorrow, and transition.
- e6 Discover and pursue our individual and collective work to advance justice, wholeness, and equity for people, our Earth, and all life on it.
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Quadrant Map Evaluation x Importance (x Inspiration to Contribute)



This plot suggests we...

- E5: Build on the the church's strength in and the importance people attach to caring for one another. This is also where the most "inspiration" is.
- E6: Build on the church's strength in and the importance people attach to finding their work for justice.
- E2: Build on the church's strength in and the importance of personal practice and communal worship.
- E4: Develop our ability to create a wider circle of belonging. We rate the end second lowest but its importance is second highest. It is also where the fourth most "inspiration" is.
- (E1: Develop our ability to build the multicultural spiritual home. We rate the end the sixth lowest, but it is fifth most important to us.)

E1 Create a multicultural spiritual home built on authentic relationships.

E2 Ground ourselves in personal practice and communal worship that grows our capacity for wonder and spiritual deepening.

E3 Articulate our Unitarian Universalist faith identity, teach it to our children, share it with others, and live it courageously in the world.

E4 Know each other in all our fullness and create an ever-widening circle of belonging for all people.

E5 Generously give and openly receive compassionate care in times of joy, sorrow, and transition.

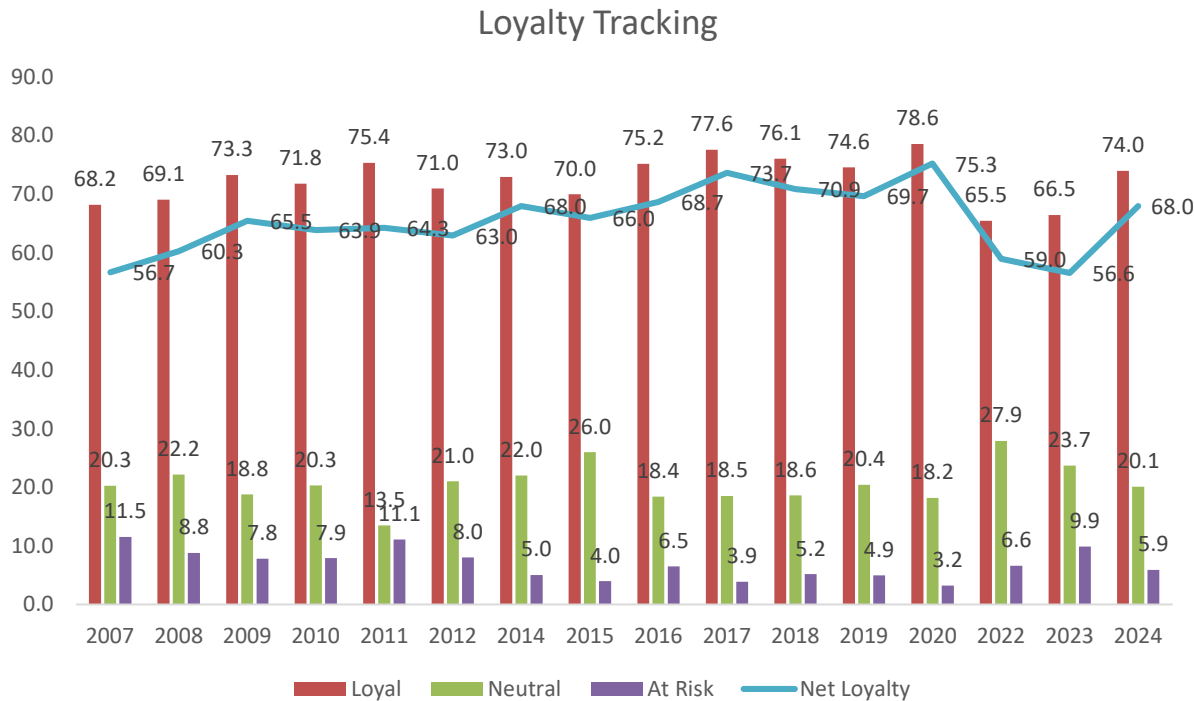
E6 Discover and pursue our individual and collective work to advance justice, wholeness, and equity for people, our Earth, and all life on it.

E7 Create brave space for racial healing and dismantling dominant culture.

E8 Sustain and steward the church and our larger Unitarian Universalist movement for the future.

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)****

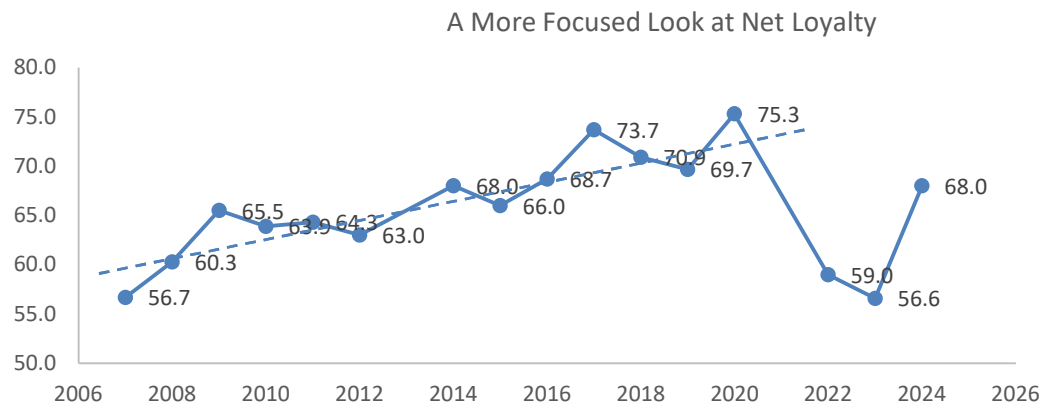


2022 v '20: large drop off in loyalty (17%) and net loyalty (22%). Both metrics “reset” in 2024.

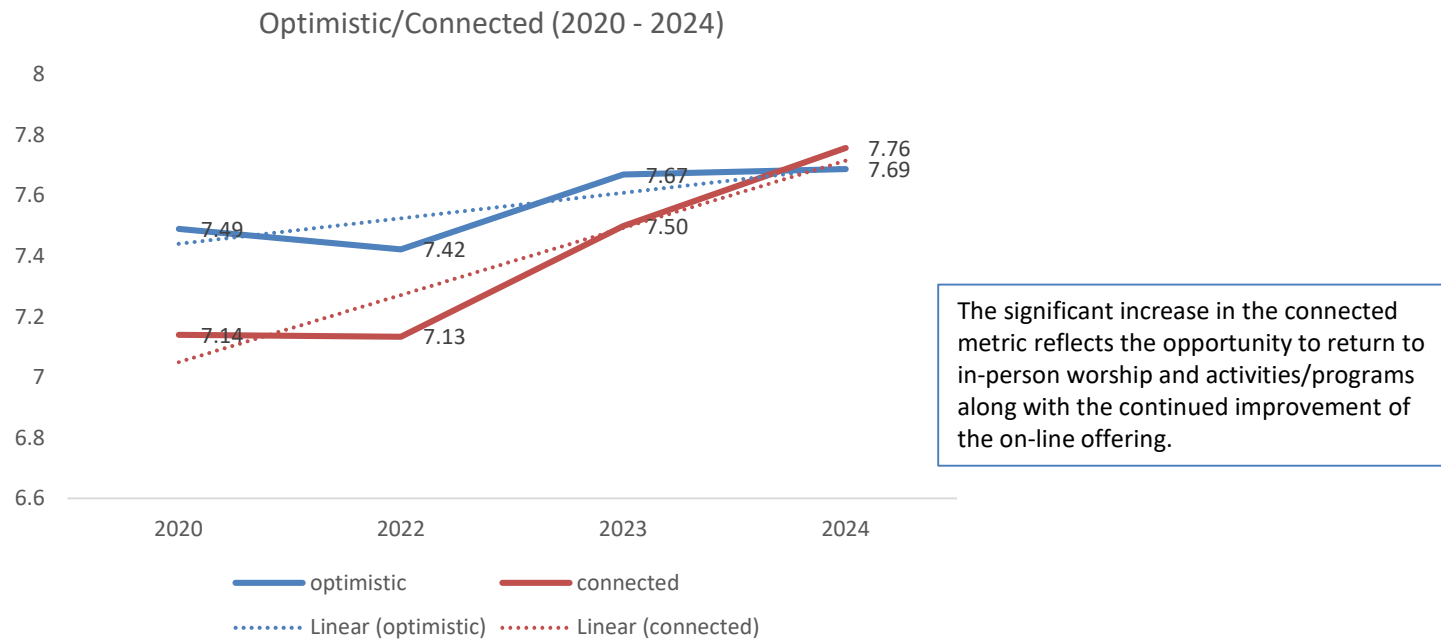
Line tracks Net Loyalty

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



- How Optimistic are you about the future?
- To what extent are you feeling connected to the church considering both in-person and on-line opportunities?

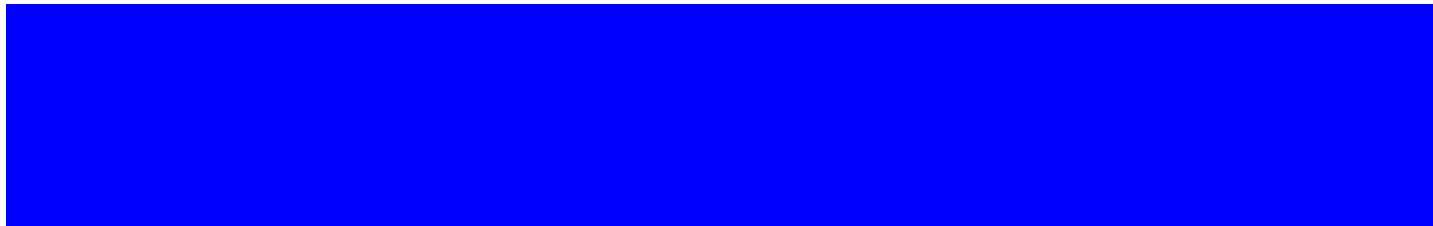


- Based on what congregants report regarding the relative importance of the eight Ends, are there segments/clusters who have similar response patterns of what they say is important to them?
 - Political campaigns want to know what issues are important (and not important) to voters... knowing what segments exist and their demographics they can more effectively plan and target communications.
 - Companies want to know what product or service attributes are important (and not important) to customers... knowing what segments exist and their demographics they can more effectively plan and target advertising.
- Cluster analysis is an analytical procedure that let's us investigate...

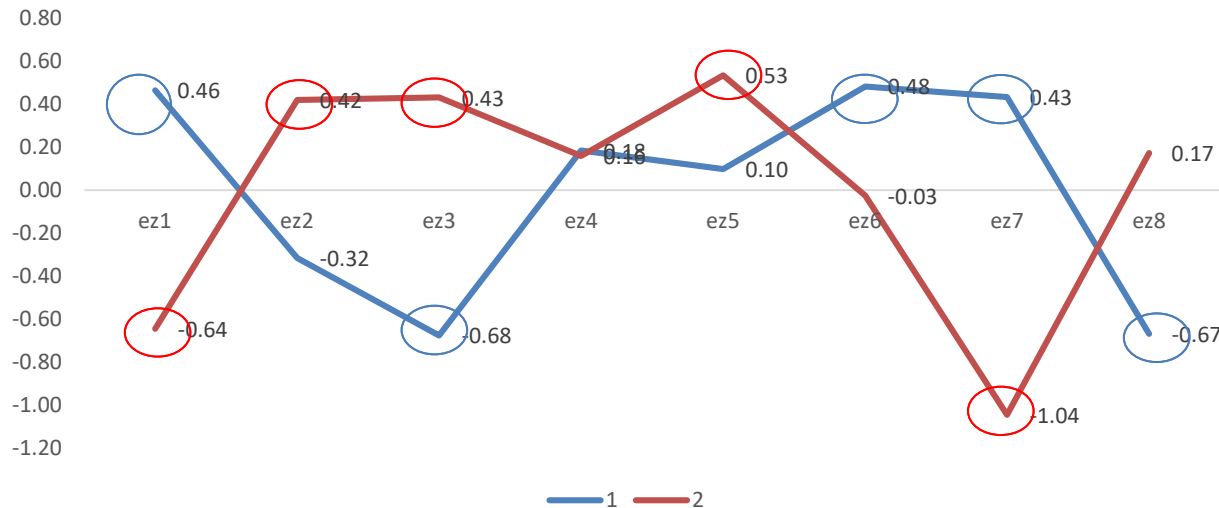
Segments Based on Ends' Importance

Using an analytical procedure called Cluster Analysis we can cluster/segment a sample into groups with similar response patterns, in this case similar patterns of Ends importance. Shown are 2 and 3 segment solutions.

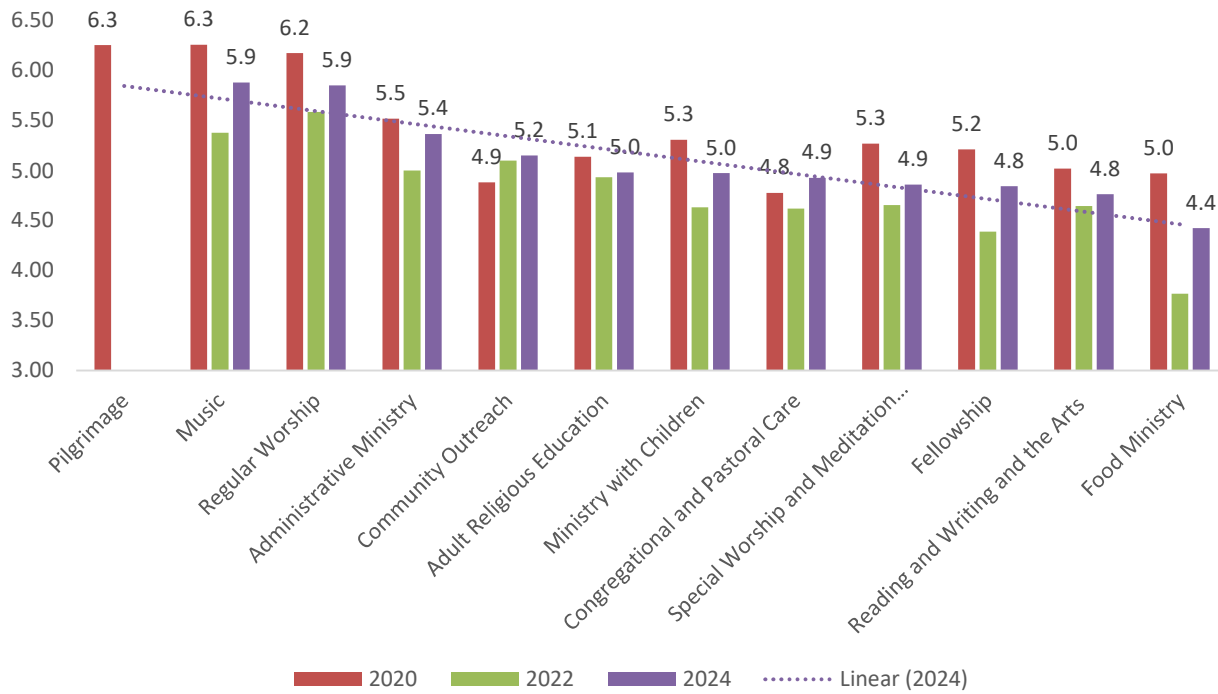
2 seg soln	relatively more imp	relatively less imp	size	ratio W/M	Age
1	1,6,7	3,8	50.71	2.6	(62.7)
2	2,3,5	1,7	49.29	1.6	66.1
3 seg soln	relatively more imp	relatively less imp			
1	2	8	25.0	2.5	65.4
2	5	1,7	43.6	1.7	66.0
3	6,7	2,3	31.4	2.2	(61.2)



Nbrs scaled so mean imp = 0.0. Positive nbrs relatively more imp; negative nbrs relatively less imp.



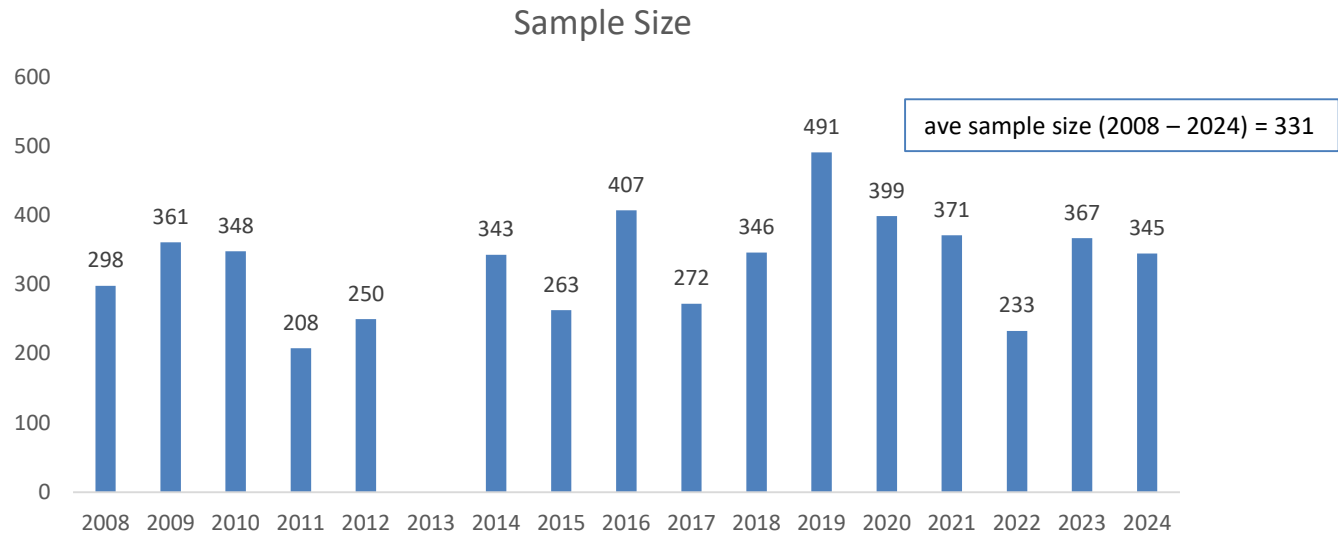
Program/Activity Impact on Spiritual Well-Being: 2020 – 2024 (7 point scale)



- Evaluations ordered based on 2024 results.
- Trend line for 2024 results.
- Results pretty consistent across years: Pilgrimage (when applicable), Music, Regular Worship lead the way.

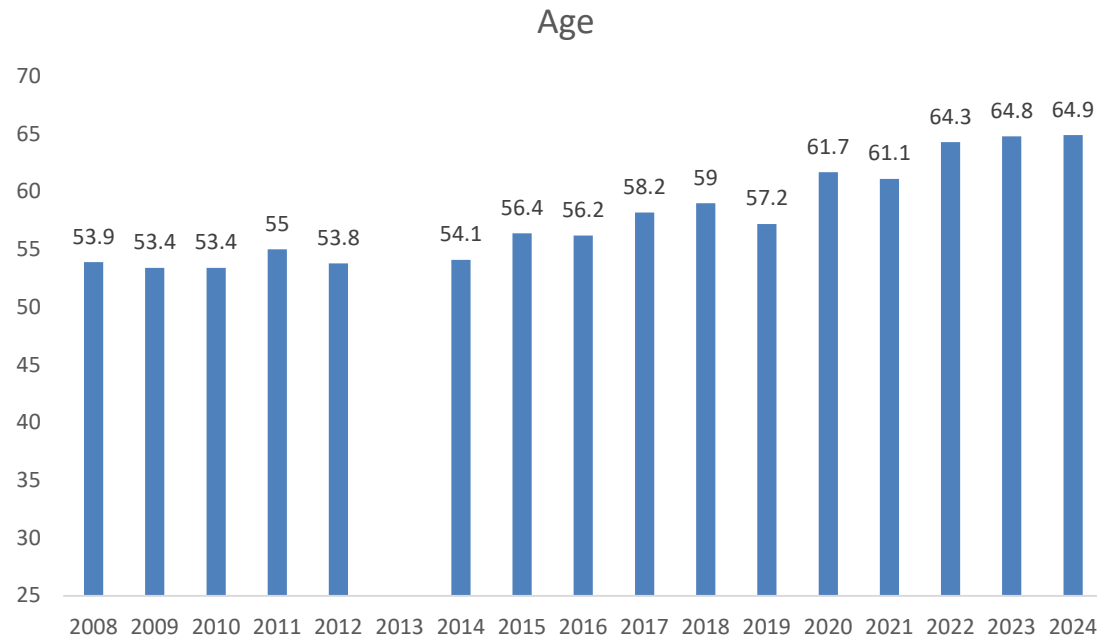


Sample Characteristics 2008 – 2024



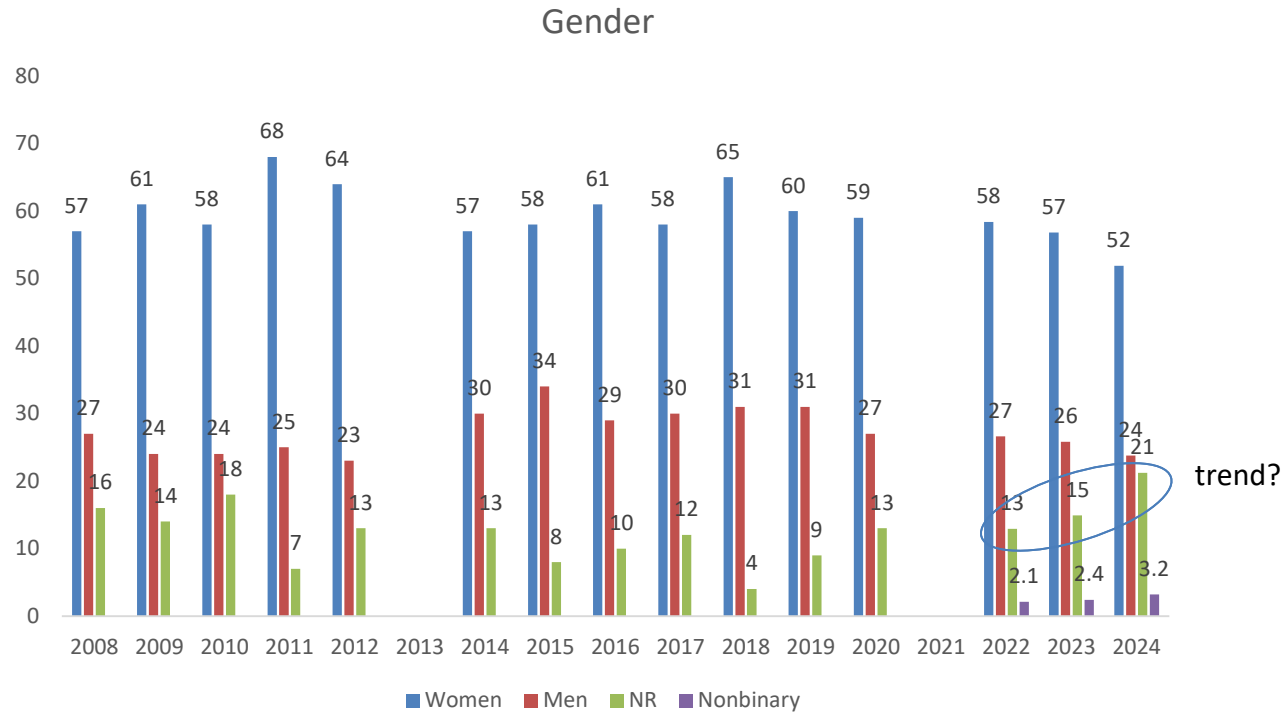
Sample Characteristics 2008 - 2024

2024	Ave Age
men	66.0
women	64.9



In 2018 we added age categories 76-85 and 85+; in prior years the final category was 66+ (the age for those in this category was set at 72). In 2020 we started asking directly for birth year. Asking age directly would have resulted in higher average ages in the years prior to 2020. Even so, the trend in survey respondents appears to be older. Does this reflect an actual trend in the congregation's average age?

Sample Characteristics 2008 -2024



Key	
Nonbinary:	Response different from man or woman (a category since 2022)
NR:	No Response

	% W	% M	Ratio W/M	Ratio W/M ('24)
Ave ('08 - '24)	60	27	2.17	2.18

Ends

- e1 Create a multicultural spiritual home built on authentic relationships.
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