

Evaluation of the UUCF Social Justice Program

By the Program Evaluation Committee

April 10, 2014

Executive Summary

This report presents the Program Evaluation Committee's (PEC) assessment of the UUCF Social Justice Program. Two questions framed and motivated the evaluation:

- As one of the three main focuses of church life at UUCF – the other two being worship and religious exploration – how well is the social justice program working?
 - More specifically, what was the impact of the position of Minister/Director of Social Justice?
- As additional funds become available for social justice via the Reach campaign, how should that money be allocated for social justice?

Methodology. The PEC conducted interviews and focus groups with UUCF ministers, current and former Social Justice Council members, and members of the general congregation; reviewed all relevant documents; and researched the social justice programs at other UU churches in the area.

Findings and Recommendations. In many respects, social justice at UUCF resembles a loose confederation of independent city-states, all occupying the same territory and all vying with one another for followers, pulpit attention, and limited resources. UUCF's social justice program provides a large tent that welcomes all comers. Its greatest strength lies in its ability to accommodate the individual social justice passions of UUCF members and friends. In this strength also lies its greatest weakness: a lack of focus. It tries to be all things to all people. UUCF Members interviewed frequently used the term "chaotic" to describe the social justice program.

Finding #1. *Social justice is alive and well at UUCF – and it is growing stronger.*

Finding #2. *Alone among major programs and activities at UUCF, social justice receives almost no direct staff support.*

Staffing. The social justice program at UUCF is an anomaly, in that it receives almost no direct staff support.

Funding. With regard to program funding, social justice is again an anomaly in that most social justice activities at UUCF are funded "off budget" and therefore depend entirely on the generosity of UUCF members who believe in those particular causes.

Recommendation: *The position of Minister/Director of Social Justice should be established as a full-time position as soon as possible.* Three overarching considerations support this recommendation:

1. Equity: Social justice is a UUCF priority.

- The pursuit of social justice is the primary expression of spirituality for many UUCF members, and an important spiritual component for many others.
- A budget shows what an organization considers to be important. Staffing costs make up the lion's share of the UUCF budget, and the staffing cost for social justice is minuscule (10 hours per week).

2. Impact: An expanded position has several benefits.

Multiply Effectiveness. A full-time position would provide a multiplier effect for such improvements as the previous Minister/Director of Social Justice led.

Provide Continuity. A full-time position would provide continuity for lay ministers and ordained ministers.

Address Existing Problems. A full-time position could address several longstanding issues within the social justice program:

- Develop a strategic plan for social justice.
- Correct organizational dysfunction within the Social Justice Council.
- Reform the Social Justice Council's responsibilities.
- Reform the Share the Plate selection process.
- Reform distribution of Share the Plate funds.
- Shift "on budget" versus "off budget" funding.
- Create processes for grant accountability.
- Strengthen transparency and openness.
- Strengthen communication about social justice.

3. Funding: The position can be sustained.

Initially, Reach funds could be used, later transitioning to other sources, such as auction funds.

Finding #3. People are concerned about the process for deciding use of the social justice set-aside of the Reach funds.

Recommendation: Decisions about allocation of the social justice set-aside of the Reach funds should be as transparent and inclusive as possible.

Finding #4. The structure of the Social Justice Council no longer serves the needs of the UUCF community.

Recommendation: The role, responsibilities, and composition of the SJC should be rethought and clarified with a view toward bringing it fully in tune to the current and future needs of the congregation.

Finding #5. There is no identifiable support for continuation of efforts to develop and establish a congregation-wide social justice project.

Recommendation: Omit including a similar strategic goal in UUCF's next strategic plan.

Finding #6. The social justice programs at other large Washington-area UU churches vary widely with respect to their scope and financial support.

Those congregations generally regarded as having strong social justice programs possess one or both of the following characteristics: (a) full-time staff devoted to social justice; (b) a sustainable, predictable source of funding for social justice. Those congregations generally viewed as having weak or troubled social justice programs possess the following characteristics:

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(a) ministerial oversight provided as a collateral duty; or (b) a weak or nonexistent equivalent to our Social Justice Council.

Social Justice at UUCF

This report presents the Program Evaluation Committee's (PEC) assessment of the UUCF social justice program. Two questions framed and motivated the evaluation:

- As one of the three main focuses of church life at UUCF – the other two being worship and religious exploration – how well is the social justice program working?
 - More specifically, what was the impact of the position of Minister/Director of Social Justice?
- As additional funds become available for social justice via the Reach campaign, how should that money be allocated for social justice?

1. Introduction

The UUCF Governance Manual states in section VII.E.2 that “[t]he Board shall engage in comprehensive review of programmatic areas of the Congregation on a multi-year basis. This Programmatic Assessment shall occur on a schedule adopted by the Board. In conducting the Programmatic Assessment, the Board may form a committee to assess a particular area, or it may direct a Board-chartered committee to assist it.”

The Board and the Coordinating Team (CT)¹ decided that program reviews should be conducted by the CT in the first instance, with CT reports being submitted to the Board for its review. The PEC is a subcommittee of the CT.

This is the second program evaluation, the first having been conducted on the Fellowship Program in 2012-1013. When the CT was in the process of selecting a program for the second evaluation, two events motivated the selection of the social justice program:

- The current part-time (10 hours per week) Minister/Director of Social Justice announced that she would be leaving that position in January 2014
- The Reach fundraising campaign of 2013 had set aside 10 percent of funds raised for social justice; that amount is expected to be about \$250,000, an amount that has not been previously available on anywhere near that scale.

The Board approved the CT's recommendation that the social justice program be evaluated. The PEC conducted this evaluation during the fall of 2013 and the endless winter of 2014.

Methodology

To place reasonable boundaries on the scope of the evaluation, the PEC used the following definition for social justice and the social justice program:

Those activities carried out by UUCF members and friends, utilizing UUCF facilities and resources, to advance social justice as defined by the practitioner. It includes community service projects, public policy

¹ The CT is charged with implementing the policies and goals of the Board of Directors on behalf of the congregation. The CT meets weekly; its five members include the Parish Minister, Associate Minister, Executive Director, and two lay members of the congregation (currently Kristin Moyer and John Cunningham).

advocacy, and education about social justice issues. It serves local, state, national, and international clientele.

The PEC agreed that comments and observations would not be attributed to individuals in this report. The few attributions are included with the permission of the interviewees. Staff and members who participated are listed in Appendix A. The PEC appreciates the support, thoughtful insights, and active participation of all of those individuals.

The evaluation included four major actions:

- **Individual Interviews.** The PEC conducted individual interviews with 10 ministers and current and former lay ministers for social justice. Questions during the individual interviews addressed goals of the social justice program, effectiveness, structure, and funding.
- **Focus groups.** To learn how the congregation perceives social justice, the PEC conducted two focus groups. The first included an array of UUCF members, while the second focus group consisted of members of the current Social Justice Council. The focus groups were asked four questions:
 - What are or should be the goals of social justice at UUCF?
 - What is working well?
 - What needs to change?
 - How should Reach funds be allocated?

The two focus groups were lively sessions with thoughtful responses by all participants.

- **Document Reviews.** The PEC reviewed a variety of documents:
 - UUCF Annual Reports (2010-2011, 2011-2012, 2012-2013)
 - Lay Minister's Council Charter
 - Social Justice Council Charter
 - May 2012 position description for Minister/Director of Social Justice
 - Data sheets showing budgeted and non-budgeted giving for social justice and outreach programs
 - Martha Ades's report on the Martin Luther King Weekend of Service
 - Background documents:
 - Brochure on "Social Justice at UUCF"
 - Social Justice Council statement of procedures and guidelines governing "Share the Plate" (Sept. 2013)
 - Excerpt from UUCF governance manual on taking public positions on social justice issues
 - Social justice at UUCF organizational chart (August 2013)
 - Data on social justice "small group participation" at UUCF (June 2012)

- **Research into Other Churches.** The PEC looked at social justice programs at four local UU churches:
 - All Souls
 - River Road
 - Arlington
 - Cedar Lane

The evaluation resulted in observations in depth at UUCF and some breadth across the local UU community.

2. Current Structure of Social Justice at UUCF

The structure of the social justice program is inconsistently described in the UUCF website, the social justice organizational chart, and other documents. That said, the social justice program at UUCF can be described as including the following elements:

Minister/Director of Social Justice (currently unfilled). According to the job description, this 10-hour per week staff position “will identify and recruit new social justice leaders and activists in the congregation, communicate social justice activities to the congregation on a regular basis, coordinate congregation-based activities and themes across a wide range of groups and interests, and represent UUCF to the larger community.” This position was established and funded for the first time during the 2012-13 church year. It was filled by Reverend Karen Rasmussen, who resigned at the end of January 2014. In an interview with Rev. Rasmussen, she felt that the primary purpose of her position was to “help people grow by listening to their dreams and passions for social justice, connect them to existing groups for their work or guide them to create something new, and then help them realize their desire to serve by getting the work out there.” She also noted some of the uniquely ministerial duties she provided, such as providing pastoral support to social justice activists and witnessing publicly for social justice causes. This position reports to the Parish Minister.

Lay Minister of Social Justice (currently filled by Martha Ades). Filled by a volunteer church member, this position coordinates social justice activities in close collaboration with the Minister of Social Justice. The time commitment for this lay minister position is significant, as this person must support all the social justice programs at UUCF - currently numbering about 13 individual groups plus the Martin Luther King Weekend of Service. Furthermore, this person attends all the Social Justice Council and Lay Minister meetings. In past years, the Lay Minister and the Chair of the Social Justice Council were different people. More recently, however, both Ms. Ades and her predecessor, Steve Myles, served as their own Social Justice Council Chairs, finding that to be more efficient. Ms. Ades and Rev. Rasmussen divided between them responsibility for nurturing the church's social justice activities. Since Rev. Rasmussen's departure, Ms. Ades has continued to “double up” as Chair of the Social Justice Council, and she has been assisted in her responsibilities by Rev. Mary Katherine Morn.

Social Justice Council (SJC). This body is a coordinating group of social justice activists at UUCF and is tasked with supporting and managing social justice activities at UUCF. The church's current budget for 2013-14 provides the Social Justice Council with a total programs budget of \$1,000, to which social justice groups may apply for funding. The Social Justice Council also approves Share the Plate recipients.

Regarding this group's composition, the Council's charter outlines a system of rotational membership (2-year terms), proportional representation from different topical areas, and youth representation, none of which is currently in effect. The charter also states that the Council must elect a Chair, which has not happened for the last few years. The UUCF website describes the function of the Social Justice Council:

- Nurturing, facilitating and recognizing the involvement of members in social justice activities.
- Planning, coordinating and funding social justice activities on behalf of the UUCF congregation.
- Furnishing a means by which UUCF's voice can be heard in the community.
- Linking UUCF members with other congregations (UU or other) and social justice groups (local and beyond).

Individual Social Justice Groups. These groups are managed independently and include both taskforces (e.g., Climate Change) and projects (e.g., Rebuilding Together). Fundraisers are approved by the Coordinating Team on a "first come- first served" basis (as indicated in multiple interviews). These groups reflect the interests of members/friends of UUCF and are in constant evolution. As mentioned above, these groups are encouraged to send a representative to participate in the Social Justice Council. The UUCF website lists the following groups/programs:

- Hypothermia Sheltering
- Rebuilding Together
- Our Daily Bread
- Hot Meals
- Climate Action Group
- Green Sanctuary Group
- ESOL Classes
- Annual Yard Sale
- Equality UUCF
- Reproductive Justice
- Gun Violence Prevention
- Partner Churches
- UUCF Peace Cairn

Additional Groups.

Religious Exploration (RE) Families. The RE program at UUCF has important social justice dimensions. Under the leadership of Rev. Rasmussen and Linnea Nelson, Director of RE, younger families with children in the RE program have had increased opportunities to engage in social justice activities. During the current 2013-14 church year, events are offered on a regular basis which are not necessarily new in themselves (for example, the Earth Day festival in April), but which are now publicized under the rubric "Families for Social Justice" and assured as being family-friendly. An October event called "Complete the Circle" raised money for Our Daily Bread and facilitated the development of knowledge about hunger in Fairfax County. We were told that the RE curriculum for grades 6 and 7 is based on social justice issues, and that this base will be permanent.

Congregational Resolutions. Section VI of the church's governance manual provides a procedure whereby the congregation as a whole can express its views on a particular social justice issue by voting on proposed resolutions. Recently, two such resolutions were approved dealing with gun violence and climate change. This report does not advocate any changes to the governance manual; we note only that a leader of the climate change group of activists is currently a member of the Social Justice Council, but there is no equivalent representation from the gun violence group.

3. Findings and Recommendations

In many respects, social justice at UUCF resembles a loose confederation of independent city-states, all occupying the same territory and all vying with one another for followers, pulpit attention, and limited resources. UUCF's social justice program provides a large tent that welcomes all comers.

The program's greatest strength lies in its ability to accommodate the individual social justice passions of UUCF members and friends. Programs and projects arise and fall as interest in them rises and wanes. It can accommodate large or small projects – ranging in scope from one or two people to several hundred. Some are one-time events and some occur annually. Some projects have extended over many years.

The program's greatest weakness is a lack of focus. It tries to be all things to all people. UUCF members interviewed frequently used the term "chaotic" to describe the social justice program.

The main findings described below start with what is working well at UUCF and then move to what might be improved.

Finding #1. *Social justice is alive and well at UUCF – and it is growing stronger.*

Leadership: Social justice enjoys strong pulpit support from the UUCF ministers. It has benefited recently from a series of capable lay ministers, and a fully occupied Social Justice Council.

The Parish Minister takes an active role in the social justice program. Although she has not met with the Social Justice Council during the past two years, frequent interaction with the Lay Ministers for Social Justice (both current and former) and most recently with the Minister/Director of Social Justice ensures that her priorities are heard at those levels.

All three ministers are generous in devoting time and energy to specific social justice issues. Most notable during the past year have been pulpit and "boots on the ground" support for anti-gun violence, global climate change, marriage equality and the FACETS hyperthermia program – all of which receive broad congregational support.

The Parish Minister also sits on the FACETS board of directors, thereby ensuring coordination with that organization with which UUCF enjoys a productive partnership spanning several decades.

Also worthy of note is the role played by the former part-time Minister/Director of Social Justice (position currently vacant). She was responsible this year for initiating and overseeing a highly successful and well-received Martin Luther King Day of Service. She also brought to the social justice program a dimension of spirituality that is not always readily observable in the quest for social justice.

Generosity: Members and friends provide significant financial support through UUCF to local, national, and international social justice causes.

This generosity generally takes two forms. The "Share the Plate" activity provides each month \$2,000 - \$3,000 to a different recipient organization selected by the Social Justice Council. This adds up to about \$25,000 to \$30,000 per year.

UUCF also serves as a channel for individual gifts to social justice organizations and activities through special collections and fund raisers determined worthy of support by the Social Justice Council and the Coordinating Team.

Volunteerism: Members and friends provide thousands of hours to serve their communities, and to advocate for social justice. The broad range of UUCF support for social justice is reflected in the numerous on-going projects and activities.

It is difficult to gauge, however, the extent to which volunteerism permeates the congregation. Some of the activities engage only a handful of supporters. Others involve a hundred and more supporters.

In general, UUCF staff estimate that there are only 60 to 70 “hard core” social justice activists in the congregation. Another 100 – 125 members and friends can be counted upon to join in specific, short-term social justice events. This leaves substantial room for growth, given a membership of about 750, plus another 250 friends and family members.

Spirituality: People interviewed for this report told us how their affiliation with UUCF sustains them spiritually as they work for social justice in their professional lives as well as through volunteer work. Significantly, both Auction sermons in 2013 (offered by the Parish Minister and the Associate Minister) were bought by individuals who selected social justice issues as the topics of the sermons. This development speaks to the congregation’s hunger for social justice and their longing for spiritual growth through social justice activities.

Community: Others have remarked that the sense of community derived from working together for social justice is their primary reward. This need for community building is perhaps reflected best in the 2014 MLK Day of Service. Numerous people have spoken to the PEC about what that experience meant to them – especially those with families.² The Hypothermia Shelter Week, Building Together, Our Daily Bread, and the annual yard sale for social justice are other activities which traditionally have provided community-building activities. Activities in support of anti-gun violence and dealing with global climate change hold promise for similar community building.

By every reasonable measure, the current social justice program compares favorably with what existed 10 or even 5 years ago, both in serving the greater community and in contributing to the spiritual growth of UUCF members. We are, in many ways, helping change the world through acts of love and justice. An historical perspective can help frame the current social justice program:

The decades of the ‘60s and ‘70s saw many individual members of the congregation active on behalf of social justice, but very little was done by the congregation as an entity.

The decades of the ‘80s and 90s witnessed the beginnings of organized congregational support for social justice, and the foundations were laid for a social justice structure that transcends personalities.

The first decade of the 21st century saw an explosion of social justice activities in terms of the number of projects supported by and through UUCF, and the number of congregants participating in those activities. With the shift to policy governance, the opportunity was created for a stronger, better coordinated social justice program. However, much of that potential has yet to be realized.

² The Martin Luther King Day of Service was funded by the Endowment Fund, without which the event would not have been possible. No ongoing support for the MLK Day event has been identified.

Finding #2. *Alone among major programs and activities at UUCF, social justice receives almost no direct staff support.*

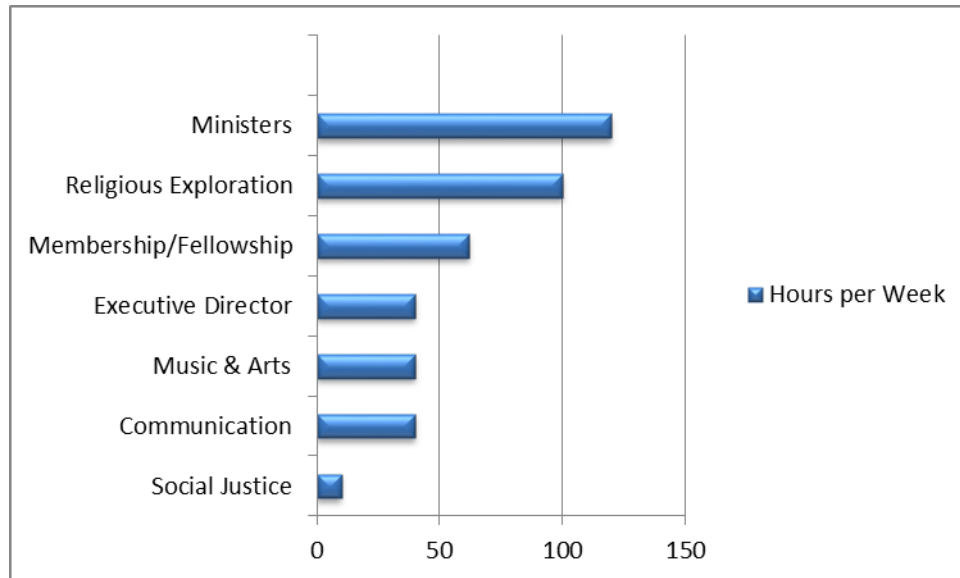
With very few exceptions, funding for social justice activities depends on giving by UUCF members who believe in those activities.

Staffing. The social justice program at UUCF is an anomaly, in that it receives almost no direct staff support. As we have described elsewhere, the position of Minister/Director of Social Justice was established during the 2012-2013 church year as a 10-hour per week position, and it has been continued in the current 2013-2014 budget at the same level. This was the first staff position dedicated to the social justice program.

The comparison to other areas of church life is striking, as illustrated in the table below. The hours are approximate, and include the following:

- 120 hours (3 X 40) for two full-time ministers and a full-time intern. These ministers do a wide variety of work, including substantial social justice work.
- Religious Exploration (RE) has a full-time Director of Religious Exploration (DRE); a summer DRE; an education assistant who supports both youth and adult RE (30 hours per week); a youth coordinator (20 hours per week); and some funding for Sunday RE staff (Nursery Coordinator and Childcare Coordinator).
- The Membership program has the support of a membership coordinator (32 hours per week) and an administrative coordinator (30 hours per week). These positions also support important fellowship activities at the church.
- The Executive Director is shown at 40 hours per week.
- The Music & Arts program has a full-time director.
- In recent years, the church has greatly expanded its communications activities. The staff presently includes a communications manager (25 hours per week) and a communications assistant (15 hours per week). We recognize that these positions can provide assistance to publicizing social justice activities, but they work in a lot of other areas of church life as well.
- At 10 hours per week, the staff position devoted explicitly to social justice has the fewest hours.

The point here is to draw a comparison between direct staff support for social justice and other important programs and activities.



Staff Hours per Week, by Major Function

Funding. With regard to program funding, social justice is again an anomaly in that most social justice activities at UUCF are funded "off budget" and therefore depend entirely on the generosity of UUCF members who believe in those particular causes.

On-Budget. During the 2012-2013 church year, the last year for which complete data are available, the following programs received "on-budget" funds in the indicated amounts: Partner Church (\$950); Rebuilding Together (\$3,500); Unitarian Universalists for Social Justice (\$1,350); Hot Meals (\$478); and English as a Second Language (\$272).

We should note that we have not included in this list the church's on-budget funding of Fairfax UU Summer Experience (FUUSE), even though many of the activities engaged in by our youth who receive FUUSE scholarships have social justice dimensions. Our reason is that FUUSE is carried in the church's budget as an RE activity, not a social justice activity. On the other hand, we have included the on-budget funds going to Partner Church because Partner Church is carried in the church's budget as a social justice activity, even though a strong argument can be made that Partner Church is a denominational affairs activity in the first instance.

The church's current 2013-2014 budget is similar. The social justice program receives total funding of \$7900. Of that, \$1,200 is allocated to Partner Church; \$3500 is allocated to Rebuilding Together; and \$2,200 is allocated to Unitarian Universalists for Social Justice. The budget also funds "church projects" at \$1,000, which is essentially a budget for the Social Justice Council to grant funds to other activities and causes such as English as a Second Language.

Off Budget. "Off-budget" funding covers a much wider range of causes and activities, and provides a much greater level of funding. During 2012-2013, UUCF members donated more than \$26,000 to a variety of community services and social justice activities through the 50 percent of Share the Plate collections that is contributed to such causes. In addition to those funds, many other causes were supported. The following is merely illustrative: Hurricane Sandy relief (\$6,544); Our Daily Bread (\$4,755); the Fistula Foundation (\$4,492); the hypothermia program (\$2,702); and relief for the victims

of the tornadoes in Oklahoma (\$2,265). Besides their budget funding, Partner Church and Rebuilding Together received "off-budget" funding totaling more than \$37,000.

Recommendation: *The position of Minister/Director of Social Justice should be established as a full-time position as soon as possible.*

On the basis of our interviews and our review of the multiple dimensions of UUCF's social justice program, the PEC recommends that the position of Minister/Director of Social Justice be established, as soon as possible, as a permanent and full-time position on the church's staff. There are several reasons for this recommendation:

- Equity: Social justice is a UUCF priority
- Impact: An expanded position has several benefits
- Funding: Sustaining the position is feasible

Equity: Social Justice is a UUCF priority. Three fundamental concepts apply here.

1. The pursuit of social justice is the primary expression of spirituality for many UUCF members, and an important spiritual component for many others. This is clearly demonstrated by the great generosity of church members in their "off-budget" funding of so many social justice causes, and by their enthusiastic participation in such large-scale projects as Habitat for Humanity, Rebuilding Together, hypothermia, and the MLK Weekend of Service.

2. A budget shows what an organization considers to be important. A budget is a policy document, because it represents the decision by an organization on how it is going to allocate its resources among its needs. A budget shows what the organization considers to be of more importance, and what it considers to be of less importance.

3. Staffing costs make up the lion's share of the UUCF budget. UUCF's budget has always been staff-driven, as should be expected of any church.

Taking those considerations into account, and comparing the 10 hours per week allocated to the Minister/Director of Social Justice position to the staff hours devoted to RE, membership/fellowship, and communications, we conclude that social justice does not receive its fair share of UUCF's resources. This was asserted repeatedly during our interviews, and is a source of longstanding unhappiness among UUCF members who are particularly devoted to social justice.

We emphasize that the PEC does not believe that the staff positions in RE and the other church activities mentioned above are unwarranted, or that the church's leadership has made a deliberate decision that social justice is unimportant. However, as long as the church's budget contains this great disparity between social justice staffing and staffing for other areas, complaints of unfairness will arise continually. It is in the church's best interest to remedy this disparity as soon as possible.

Impact: An expanded position has several benefits. The PEC's analysis is that a full-time Minister/Director position should provide multiple benefits to the social justice program -- and to the UUCF community.

During her brief time with us, and working only 10 hours per week, Karen Rasmussen was instrumental in bringing about some remarkable improvements to the social justice program. DRE Linnea Nelson generously told us that the "families for social justice initiative" was primarily Karen's idea. Karen worked with Lay Minister Martha Ades in successfully applying for the Endowment Committee grant that made the MLK Weekend of

Service project financially possible, and then helped to make the highly successful weekend happen. A new brochure entitled "Social Justice at UUCF" is now available in the sanctuary.

Multiply Effectiveness. A full-time position would provide a multiplier effect for such improvements. It should be remembered that 40 hours a week for one person is more efficient and has a greater impact than simply taking the present 10 hours a week and multiplying that by four. In other words, the work that goes into 10 hours does not have the same effect as one fourth of a full-time position.

A full-time Minister/Director position would make the job of Lay Minister for Social Justice manageable and meaningful. The scope of social justice activities at UUCF is so wide that it is too much for any one person serving as Lay Minister, no matter how dedicated and hardworking that person may be. In the past, there have been as many as three lay ministers for social justice serving at one time, with particular causes divided among them. During Karen Rasmussen's time as Minister/Director of Social Justice, she and Lay Minister Martha Ades similarly divided social justice activities among them. The amount of time and attention given to each activity would be greatly and beneficially increased, if the Minister/Director of Social Justice were present at the church for 40 hours per week instead of just 10.

Provide Continuity. A full-time Minister/Director of Social Justice would provide much-needed continuity in the social justice program that cannot be provided by lay ministers. Lay ministers have limited terms of office, and when a Lay Minister for Social Justice departs, his or her successor may have entirely different goals or interests. The Minister/Director of Social Justice should always work with the incumbent lay minister, but a full-time, constantly present Minister/Director of Social Justice would provide consistent goals and institutional knowledge about, for example, what has worked in the past and what has not.

A full-time Minister/Director of Social Justice would also provide continuity as ministers change. UUCF is blessed to have a parish minister who views the pursuit of social justice as a primary focus of her ministry. But Mary Katherine will not always be with us, and the next minister may have a different focus. The social justice program needs to have a full-time staffer who would provide the dedication, energy, and innovations that right now are provided by Mary Katherine. To put it another way, leadership of the social justice program should be provided by a full-time Minister/Director of Social Justice in addition to leadership from the church's minister, rather than our present situation where leadership of the social justice program is provided by our parish minister instead of by a full-time Minister/Director of Social Justice.

Address Existing Problems. A full-time Minister/Director of Social Justice is needed to address several longstanding issues within the social justice program. These issues are beyond the fair responsibility of the Lay Minister for Social Justice or the Coordinating Team. Recommendations on possible solutions should come from a full-time professional in the first instance, with subsequent review by the Coordinating Team and, if necessary, the Board. These issues include the following:

Develop a strategic plan for social justice. A lack of clarity exists at multiple levels regarding the mission, goals, and objectives of the social justice program. As a result, there is no overall guiding principle or priorities other than a principle that everyone is welcome to do their own thing, provided they can generate sufficient support to accomplish it.

- The Minister/Director of Social Justice could lead or oversee development of a multi-year strategic plan that sets forth UUCF's social justice mission and establishes priorities, goals, and measurable objectives.

- This plan should focus initially on current social justice activities and be sufficiently flexible to accommodate new needs and interests as they arise.
- The plan should explicitly address congregation-wide resolutions, and commit to putting focus and force behind such resolutions.
- All proposed social justice activities should be evaluated within the context of the strategic plan. Access to UUCF's facilities, support, and funding should be based upon compliance with the strategic plan.

Reform the Share the Plate: selection process and distribution of funds.

Selection process. We were told in some of our interviews that choosing Share the Plate recipients should not be the responsibility of the Social Justice Council. It was not clear how widely this view is held; the Share the Plate procedures were recently revised by the Council during Steve Myles's tenure as lay minister, after a lot of careful thought and work. But if responsibility for choosing recipients is going to shift, the obvious question is -- to whom? One suggestion to us was that the congregation should make the choice at the annual meeting by voting among a list of causes, thereby increasing congregational "buy in." But that raises another question: Which causes should be "nominated" for such a vote? The Minister/Director of Social Justice should have a primary role in answering that question.

Distribution of funds. On a closely related topic, we were also told in some of our interviews that the church's distribution of Share the Plate funds should be changed so that it is less diffuse and more focused on major issues that have a larger impact on our local or national communities. Such a change could be intensely controversial, particularly among those church members who seek Share the Plate funding for causes they passionately believe in. But if Share the Plate is to have a narrower focus so that more money is going to fewer causes, the transition to that new system should be led by the Minister/Director of Social Justice.

While this evaluation was in progress, a Social Justice Council review of Share the Plate was also underway. We do not presume to prejudge the outcome of the SJC review. We do believe that whatever the outcome, Share the Plate policy and procedures should have the following characteristics: (1) a "due diligence" examination of all proposed recipients before approval; (2) a follow-up review after a reasonable period of time to ascertain that the funds were used for the intended purpose and contributed to the intended effect (as described in the section below about accountability); and (3) internal procedures to prevent conflicts of interest or the appearance of conflicts of interest within the SJC or with family members.

Shift "on budget" versus "off budget" funding. The congregation's extensive "off budget" funding of social justice causes (in addition to Share the Plate contributions) is a two-sided dilemma. On the one hand, it allows members of the church to fully express their social justice spirituality by advocating on behalf of causes they believe in. On the other hand, and similar to Share the Plate, it can lead to scattered and diffuse funding with no overarching themes. We were told of two related problems: some causes are so identified with one person that they are not really UUCF causes at all, and when a cause has been championed by one person and that person steps away, the cause ends up abandoned regardless of its worth. Similar to Share the Plate, a full-time Minister/Director of Social Justice could be of great assistance to the church by addressing this longstanding issue.

Create processes for grant accountability and report on results. Follow-up on flow-through funding needs to be strengthened. Once a check is written, there is a lack of accountability for how these funds are used or what is accomplished – except such information as the sponsor volunteers to provide. Procedures are needed so that the sponsoring group or individual to provide a follow-up report on how non-budgeted funding – including Share the Plate - is used. These procedures should be geared to the magnitude of the gift, e.g., an expenditure of \$500 should be less burdensome than one of \$50,000.

Strengthen transparency and openness. Perceptions exist that those who speak loudest on behalf of a specific social justice issue, or have the right connections, receive the most attention – and the most resources. As a result, some worthwhile issues may not come to the attention of social justice leaders, while some members of UUCF feel that they are not kept fully informed about existing policies, procedures and opportunities.

Strengthen communication about social justice. In a related vein, communication among the ministers and the Social Justice Council and with the congregation regarding proposed policy changes affecting the social justice program needs strengthening; most notably with regard to “Reach Campaign” funding for social justice and Share the Plate. Such communication should include descriptions of social justice processes, as contrasted with issues and events. Included in this work is making UUCF’s website more accessible on social justice issues for those interested in **how** things are done as well as **what** is done.

Funding: The position can be sustained.

A full-time, well-funded position for an experienced, well-qualified individual is essential. Initially, Reach funds could be used, later transitioning to other sources, such as auction funds.

To put it simply, a 10 hours per week salary for the Minister/Director of Social Justice position is not likely to attract well-qualified applicants, and even if the church is fortunate enough to land someone who is well-qualified, that person will not stay long. Karen Rasmussen illustrates that fact. Analogous to the position of Director of Religious Exploration, the position of Minister/Director of Social Justice should be treated and funded as a full-time professional position.

The PEC does not make this recommendation in willful ignorance of UUCF's budgetary realities. We know that it may take some time to build the church's budget in a way that will allow the position of Minister/Director of Social Justice to be staffed the way it needs to be. While the PEC is not attempting to solve the funding issue, we recognize some possible approaches to that solution:

Reach funds. In the short term, we urge that careful consideration be given to using the 10 percent social justice "set aside" out of the Reach funds to temporarily support the Minister/Director of Social Justice position. It would be necessary to put together a funding plan that covers the next four budget years, through 2017/2018. At the beginning of the Reach Campaign, the Board stated that its third highest priority, after the parking lot and sewer connection projects are completed this year, was to pay off the church's long-term debt by 2/3, or \$750,000. Currently, the church's debt servicing takes over \$100,000 out of the annual budget. If that cost can be reduced by even half, substantial funds will be freed for other uses. However, the payment period for Reach pledges runs until the end of 2017, so it will not be known until then exactly how much debt reduction will be possible.

Auction funds. Relatedly, a vision has been raised that, if the debt load were reduced with Reach funds, it might be possible to change the annual auction so that it becomes purely a social justice fundraiser. Apart from our present responsibility, the members of the PEC applaud that vision -- it could be a transformative event for the auction, providing it with new energy and excitement.

In our present capacity, we urge that the church's leadership commit now to full and permanent funding of the position of Minister/Director of Social Justice, as soon as that becomes possible.

Finding #3. People are concerned about the process for deciding use of the social justice set-aside of the Reach funds.

The concern about this process was widespread, arising in individual interviews and focus groups. Responses to direct questions about the use of the social justice set-aside had some common themes:

- The suggestions tended toward using the funds either to support the two congregational resolutions (gun violence and climate change) or to address more parochial interests.
- There was expressed opposition to funding off-campus sites with the Reach campaign's set-aside for social justice.
- People frequently recommended an increase in staff time (usually, 20 hours) for a Minister/Director of Social Justice. No one suggested that a full-time position be created – that is the PEC's recommendation.
- Interviewees expressed the hope that the social justice Reach set-aside would be used to leverage transformation and not be dispersed in accordance with the status quo.
- Some were afraid that decisions had already been made about what would happen with the Reach set-aside funds.

Recommendation: Decisions about allocation of the social justice set-aside of the Reach funds should be as transparent and inclusive as possible.

Some of the congregation's concerns could be allayed if the Board or CT issued a brief statement about the status and process for decisions about the set-aside.

Finding #4. The structure of the Social Justice Council no longer serves the needs of the UUCF community, and it should be changed.

The basic structure of the Social Justice Council reflects the social justice program as it existed during the late 1990s and first decade of the 21st century. Due to the intervening growth of the congregation, and the greater number of congregants interested in a wider variety of social justice activities, it is no longer practical or desirable for SJC membership to consist primarily of individuals representing specific social justice projects or limited, parochial interests. Broad vision and a balanced perspective are required of all its members in order to meet congregational aspirations to the fullest extent possible.

Recommendation: The composition, role, and responsibilities of the SJC should be rethought and clarified with a view toward bringing it fully in tune to the current and future needs of the congregation.

It is not within the scope of this evaluation or the role of the PEC to specify in detail what the SJC profile should be. However, other recommendations in this report, including full-time staff support and an enhanced strategic planning process, should make it possible to relieve the SJC of much of its current information coordinating and event scheduling activities -- in order to focus on priorities, on policies, and on systemic issues that impact upon the ability of congregants to live out their values in the public arena.

Council's composition. The Council's charter, as revised in January 2012, calls for members of the Council to serve staggered two-year terms, so that half the seats on the Council become vacant each year. New members are to be approved by the Coordinating Team. None of that has happened. There is a serious question of whether the Council is a workable organization within its present form; it appears that Council members come and go as they please, depending on whether they have a cause they wish to push forward.

Council's role and responsibilities. It has been suggested that the Social Justice Council should be split between advocacy/education and community service, with different Council members gravitating toward whichever area more interests them. Such a new organizational form would require extensive coordination, to avoid duplication of effort and wasted resources. Again, it would be unfair to expect a two-year volunteer lay minister to undertake such a task.

However chosen and whatever their personal social justice passions, SJC members should be given to understand that parochial interests are to be set aside when doing the work of the Social Justice Council -- on behalf of the entire congregation.

Finding #5. *There is no identifiable support for continuation of efforts to develop and establish a congregation-wide social justice project.*

UUCF's strategic goals for 2010-2013 included the following: "UUCF will develop and establish a congregation-wide social justice project to meet an identified need in the surrounding community." In pursuit of this goal, former Lay Minister Steve Myles and many others spent an extraordinary amount of time and effort to identify a project that would be meaningful, that would have a major beneficial impact, and that would allow participation by all interested members of the church, including young families and children. At length, it was regretfully and reluctantly concluded that such a comprehensive and ongoing project was simply not feasible.

Recommendation: *Omit including a similar strategic goal in UUCF's next strategic plan.*

Our interviews and conversations revealed no support for continuation of such efforts to find a "one size fits all" project. On the contrary, we were told repeatedly that the realities of life in Northern Virginia and the needs particularly of families with young children require the church to continue to offer a variety of projects that aim to meet different kinds of needs, involve different levels of commitment, and, perhaps most important, are of defined and limited time duration.

Finding #6. *The social justice programs at other large Washington-area UU churches vary widely with respect to their scope and financial support.*

The UUCF governance manual (part VII.E.2.c) requires a program review to consider "similar programmatic activities of other non-profit and religious institutions regardless of their denomination or affiliation. The PEC examined the social justice programs at four other large Washington-area UU churches.

All Souls. Of the four churches examined, All Souls has by far the largest and best-funded program. A staff person holds the title of "Director of Social Justice Ministries." The current incumbent in that position is a minister. In 1973, the Beckner Advancement Fund was established by a donation from two church members (a married couple). The fund is managed by a committee (the "Beckner Committee") made up of All Souls members and church staff. Every year, the Fund distributes over \$100,000 in external grants to social justice organizations that work in Washington and have a presence in All Souls' Ward 1 neighborhood. Affordable housing is an important example of causes supported by such organizations. In addition, the Fund provides internal grants to activities within the church that have a particular focus on social justice work. Most internal grants are \$5,000 or less. The Fund also partially supports the salary of the "Director of Social Justice Ministries."

River Road. River Road is unique in having an annual social justice pledge separate from the operating fund pledge. The River Road Social Justice Council organizes that aspect of River Road's annual stewardship campaign. It selects "designated pledge organizations" that River Road members can choose to support. Members can also direct that all or part of their pledges go to "general outreach funds," which are distributed by the Social Justice Council to organizations that it has selected. The Social Justice Council has its own "accounts manager" and the church's senior minister is an ex officio member of the Council. During the stewardship campaign for 2013-2014, River Road members pledged a total of \$51,790 to social justice. Of that, \$33,810 went to designated pledge organizations and the remaining \$17,980 went to general outreach.

Arlington. Arlington donates its worship service offerings ("Give the Plate") entirely to community organizations with a social justice focus.

Cedar Lane. Comparable to UUCF in size of membership, Cedar Lane has our practice of splitting worship service collections 50/50 between the church itself and outside organizations. In 2012-2013, Cedar Lane distributed about \$11,400 to such organizations. In addition, about \$5,000 were raised for special causes, such as Hurricane Sandy relief. As is discussed elsewhere in this report, UUCF members contributed much more money during the same time period -- \$26,344 in "Share the Plate" donations alone.

No recommendations resulted from our examination of other churches. No one we talked to recommended a separate pledge for social justice such as River Road's.

It should be noted that those congregations generally regarded as having strong social justice programs possess the following characteristics: (a) full-time staff devoted to social justice; and/or (b) a sustainable, predictable source of funding for social justice. Those congregations generally viewed as having weak or troubled social justice programs possess the following characteristics: (a) ministerial oversight provided as a collateral duty; and/or (b) a weak or nonexistent equivalent to our Social Justice Council.

4. Conclusion

The PEC's overarching recommendation is that UUCF work toward creating a full-time Minister/Director of Social Justice. UUCF clearly has a robust social justice program that receives widespread support from the

Final CT

congregation, with active involvement from a hard core of about 10 percent of the congregation. The social justice program would be much improved with the increased focus, integration, coordination, and reformation that a full-time Minister of Social Justice could provide.

Appendix A: Interviews and Focus Groups

Individuals Interviewed

Rev. Mary Katherine Morn

Bob Hatfield

Rev. Karen Rasmussen

Martha Ades

Steve Myles

Linnea Nelson

Jerry Poje

Rich Sider

Frank Palmer

Barb Brehm

Focus Group Participants

Group 1

Scott Peterson

Cheryl Sadowski

Rita Roth

Ann Marie Cunningham

Sean Foley

Mike Casey

Group 2

Bruno Walker

Dee Idnani

Mary Lareau

Andrea Grosse

Lois Phemister

Susan Bennett

Marilyn Schuyler

Barbara Harding