

SOCIAL ACTION AT FIRST UNITARIAN

November 2005

EXECUTIVE SUMMARY

Background.

First Unitarian supports a number of social action projects, to which the congregation gives generously. The convenor team recognized that we needed:

- a.) a methodology to democratically select annual congregational projects; and
- b.) improved processes for managing the existing social action projects

Terry Lee, Outreach and Denominational Activities Convenor, established two Task Groups to address these issues. The task force on the annual congregational project was chaired by Nancy MacTavish. The task force on existing social action (Rankin) projects was chaired by Terry Lee. This report contains the findings of both task groups.

Mission Statement.

Our goal is to create a culture of social action by creating structures and a process to make it easy for members to engage in social action, together or individually.

Annual congregational project.

The report outlines the goals of social action at First; criteria for approving a major congregational project; and a process to select a project

The Outreach Convenor will solicit proposals from the Congregation. Projects that meet the criteria will be brought to the congregation for a vote to select one official congregational project. Normally, this will happen at the Fall Congregational Meeting. This year, the vote will be at the Annual Budget Meeting in January 2006.

On-going Social Action projects.

Approved social action projects enjoy certain privileges, including special Sunday services, a special offering, free meeting rooms and access to congregational publicity vehicles. Presently, we have Rankin groups, affiliate groups, and denominational groups. The Rankin groups are approved by the congregation; the others by the Board.

We are proposing to rename Rankin projects “social action projects”. We also recommend that the congregation vote on affiliate groups and denominational groups, as well as social action (Rankin) groups. In order to qualify for congregational support, groups must meet the criteria described in this report in order to demonstrate their viability and accountability.

Groups that would normally have their special Sundays in January to May 2006 may proceed with their plans, but must qualify for renewed approval in 2007. The CEO may from time to time approve other special offerings for crises and disasters.

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INTRODUCTION

Background

In the summer of 2004, in response to the Durall report in the spring of that year, the Convenor Team discussed social action at First with a view to enhancing our commitment and action.

In the fall of 2004, the Convenor Team presented a proposal to the Board and the Congregation for a major social action project to be undertaken annually, as a congregation. We also proposed that the project for the first year be Habitat for Humanity. This proposal was embraced by the congregation at the Fall Congregational Meeting in November 2004 and implemented in 2004/2005.

At the same time, we recognized that we needed:

- c.) a methodology to democratically select future annual congregational projects; and
- d.) improved processes for managing the existing social action projects

Terry Lee, Outreach and Denominational Activities Convenor, established two Task Groups to address these issues.

The task force on the annual congregational project was chaired by Nancy MacTavish. The members were Margaret Vandenbroucke, Art Brewer, and Catherine Schuler

The task force on existing social action (Rankin) projects was chaired by Terry Lee. The members were Richard Kirsh, Stan Yack, Margaret Rao, and Wayne Lepine.

This report contains the recommendations from both task groups.

Mission Statement

Social action is specifically mentioned in our mission statement (1996). One purpose of our congregation is “responsible service to and social action in our city and beyond”. The key strategies to achieve this goal are “support and encouragement for individual social action, processes for defining how and when collective action can be beneficial, and effective organization to implement collective action.”

Our goal is to create a culture of social action by creating structures and a process to make it easy for members to engage in social action, together or individually.

ANNUAL CONGREGATIONAL PROJECT

1. Description

Annual Project Philosophy:

To inspire First Unitarian Congregation of Toronto's membership to put shared values into action through a unique undertaking to make a better world. The project process outlined in this document will allow for the initiation of organized action.

Goals of Social Action:

- ✓ To have a positive influence in the world
- ✓ To apply our Unitarian values
- ✓ To give purpose and meaning to our lives
- ✓ To build community by working together within and outside our congregation for a better world
- ✓ To inspire generosity among our members
- ✓ To raise our profile in Toronto and attract potential new members with shared purpose and values

2. Criteria

- ✓ Time-limited project with a measurable result
- ✓ Consistent with U*U principles
- ✓ Potential for varied roles for many members
- ✓ Projects should have more than a financial component
- ✓ Chosen democratically
- ✓ Any partners are reputable organizations with strong management expertise and whose principles align with U*U principles
- ✓ Not to supplant projects developed through the social action (Rankin) and affiliate group processes
- ✓ May be a specific outcome related to a social action (Rankin) or affiliate group project
- ✓ Financial element of project must be commensurate with goals
- ✓ Emergencies (e.g. tsunami relief) will neither supplant nor be negated by the project

3. Process

Timetable:

§ **Fall 2005:** We are asking the Board to approve a process for selecting a congregational project and the congregation to approve a project.

- § **January 2006:** Congregation selects a congregational project for 2006.
- § **April/May:** Advertise for submissions of project proposals for 2007, appoint reviewers, and hold information meetings regarding the process and criteria.
- § **September:** Review submissions against criteria – short list developed if necessary.
- § **Fall pre-budget meeting:** Congregational vote to select the congregational project for 2007
- § **November/December:** Leadership convened to initiate project for forthcoming year

Leadership: The Outreach and Denominational Activities Convenor will run the process through to project selection and take the lead and report progress thereafter with a team of “core” volunteers and volunteer convenors. The core volunteers will be recruited by the project proposal-makers and the Outreach Convenor. The Outreach Convenor will advise supporters for the continuation of a project beyond its planned interval on how to accomplish this within the parameters of the social action processes of the congregation.

Communications Process: use the website, Order of Service, bulletin boards and Horizons to advertise the process and request submissions; project proposal-makers also may use these vehicles to post ideas and seek partners for submissions.

Proposal Review Process: The Outreach Convenor will recruit a small team of proposal reviewers. They will assist proposal-makers to develop their proposals to fulfill the criteria (*see form in Appendix II*) and promote their ideas through the congregation. Proposals will be evaluated and those meeting the criteria will be brought to the fall pre-budget meeting to be voted upon.

Weighted Congregational Voting Process:

1. Rationale: Weighting of the results means members will be able to express a willingness and desire for more than one possible project, decreasing the likelihood of a win-lose interpretation and increasing the likelihood of wide support for and participation in the successful proposal.

2. Process: At the fall pre-budget meeting, distribute handouts and proposal presentations preceding the vote. The proposals will be mounted on the walls and each voting member will receive two vote stickers per proposed project (2 stickers X # of projects per member). Members will allocate their votes to the proposals they prefer by placing stickers on the proposals mounted on the walls. Each voting member must allocate their votes to more than one project. The proposal receiving the most votes will become the congregational project.

Implementation:

The project will be implemented by a Committee of the project’s core volunteers, and volunteer convenors, reporting to the Outreach Convenor. The project will have the same rights and privileges as a social action project (see below) and will be required to meet the same reporting criteria to provide accountability to the congregation.

ON-GOING SOCIAL ACTION PROJECTS

1. Description

This congregation already supports selected official social action projects and some affiliate groups. The official social action projects are voted on by the congregation at the AGM, through what we used to call the Rankin Process. Affiliated groups are groups that exist outside the congregation, but have congregational support or chapters. The affiliated groups used to be approved by the Board. All projects are entitled to the support of the congregation through access to Sunday services and after-service activities, publicity venues such as Horizons and the Order of Service, the use of facilities, and a special collection.

Former Rankin Groups

Central America
Food and Shelter
Refugee Project

Affiliate Groups

Amnesty International Group 142
Canadian Unitarians for Social Justice
Child Haven
UU-United Nations Office

Denominational groups

Canadian Unitarian Council
Partner Church Committee.

We are now proposing to call the Rankin process the social action process.

2. Criteria

In order for the social action groups, affiliate groups, and denominational groups to demonstrate their viability and accountability, we recommend the following new expectations:

- Each group has a chair and/or contact who is a member in good standing (i.e. a member who has made a donation in the last 12 months).
- The group has an updated list of 10 backers/supporters who are members in good standing. Groups are encouraged to seek out new members to join.
- Each group will meet at least twice a year.
- Each group will provide an annual report to the Outreach Convenor in which they outline their list of backers, meetings held, actions taken, results achieved, the amount of money raised, and how it was allocated and/or spent by the group during the year. This report will go into the Annual Report.

3. Process

Annual timetable

- § Reports from social action groups, affiliate Groups and denominational groups will be due to the Outreach Convenor by March 31. If a group fails to fulfill the above criteria, they will not be recommended to the Congregation for the coming year.
- At their April meeting, the Convenors will develop the list of approved projects and recommend the list to the congregation. This list will include affiliate groups and denominational groups, which were formerly approved by the Board, not the Congregation.
 - At the May Annual General Meeting the Congregation will vote on the list of approved social action groups/projects (including affiliate groups and denominational groups) for the next year (September to June). Approval at the AGM makes it possible to schedule special Sundays in the worship calendar for the coming year.

Leadership

The Outreach and Denominational Activities Convenor (or his designate) will provide support and monitoring to the groups.

CONCLUSION

First Unitarian is a generous congregation. We have demonstrated in the last year that we are willing and able to support many worthy causes (*see Appendix II*). We expect that the congregation will continue to reach out to help others in three ways:

1. An annual congregational project, that has the potential to involve everyone.
2. Continued support of social action groups, affiliate groups, and denominational groups.
3. Responding to crises and disasters as they arise.

Special Sundays

The congregational project and approved social action, affiliate, and denominational groups are entitled to ask for congregational support through a special offering at a Sunday service. From time to time, the CEO may also approve special offerings for emergency crises and disasters. The Board has determined that appeals during Sunday services shall be made no more than once a month.

Recommendations:

We recommend that:

1. The process for an annual congregational project be approved.
2. The process for social action groups, affiliate groups and denominational groups be approved.
3. Affiliate groups and denominational groups be approved by the Congregation, not the Board.
4. The process be implemented over the next year. All groups will need to fulfill the criteria and file a report by March 31 in order to qualify for the approved list for 2006/2007.
5. Groups that normally have their special Sundays in the period of January to May will continue to do so in 2006.

Nancy MacTavish
Terry Lee
November 1, 2005
(*rev. Nov. 22, 2005*)

APPENDIX I

Special Collections 2004-2005

Date	Group/Cause	Type	\$ donated
October 2004	UU/United Nations Office	A	\$1,328
November	Food and Shelter Committee	R	\$7,780
December	Amnesty International	A	\$1,764
January 2005	Tsunami Relief (Unicef)	E	\$10,774
February	Habitat for Humanity	C	\$61,041*
March	Canadian Unitarian Council	D	\$2,500
April	Child Haven	A	\$2,180
May	Partner Church (Budapest)	D	\$2,921
June	Refugee family	R	\$18,044
July	none		
August	none		
September	Central America (Oct. 2) (Hurricane Katrina)	R	\$2,931
		E	\$1,400
		TOTAL	\$112,663

- amount raised for Habitat for Humanity during the year, through the February Sunday collection, April “No Place Like Home” fundraiser, money collected by Build participants, and private donations

Legend:

R=Rankin Project	Voted by the congregation
C=Congregational Project	Voted by the congregation
A=Affiliate group	Approved by the Board
D=Denominational	Approved by the Board
E=Emergency	Approved by the CEO

APPENDIX II

**Proposal Submission for
Congregational Social Action Project**

**(One form per Proposal please. Deadline for proposals
: _____)**

Project Name:

_____ **Date** _____

Prime Contact :

_____ **Telephone** _____

**Names of other “core” volunteers committed to participate in this
project:**

Description of Project Proposal:

Project

Outcome: _____

Funding Information (Please attach details)	
Total estimated project cost?	When required?

Timing Information	
Start date	End date

Name of outside agency/agencies partnering in this project, if any. (Please provide some background documentation).

How will this project actively involve members?

How will this project align with and promote U*U principles and Toronto First?

Additional Information:

Once completed, please return this form to the Outreach and Denominational Activities Convenor.

APPENDIX III

Social Action at Other UU Congregations

A questionnaire was sent to 8 churches across Canada and three responded. The following material was collected.

<u>Name of Congregations</u>	First Unitarian Church of Hamilton	275
	First Unitarian Congregation of Ottawa	564
	North Shore Unitarian Church, West Vancouver	250

Each congregation has a Social Action Committee (or similar title) made up of people who are interested and who are designated by virtue of their affiliation to a working committee. One has representation also by the Awards Committee that evaluates written requests for funding from different social action groups.

The range of current activities:

- Fair trade coffee sales
- Mental Health - collection of books and organized fundraisers
- Equal Marriage – organized petition and letter writing campaign
- Disarmament – organized a petition
- Environment – has become a green sanctuary
- Food donations – for a local food bank
- Various relief efforts – organized a concert for Tsunami relief
- Shalom Enterprises – financial assistance to multi-racial group
- Prisoner Support Group – Write and send books to American prisoners
- Support for Child Haven
- Affordable Housing
- Workshops on poverty

Projects may emerge from individuals or working groups. New working groups are accepted by Social Responsibility Committee if they meet the terms of reference. One congregation has the Social Action Committee making the decisions.

Level of Satisfaction

One congregation said that they felt that their social action efforts “were not bad”. They felt it was easier to raise money than to get their members personally involved. Another congregation indicated that their social action efforts were doing “better than average” and that their projects were well supported. The final church felt that their efforts were again “not bad”.

Problems

One response was that they use the newspaper, brochures and also receive the assistance of a Volunteer Resource Council that acquaints members with volunteer opportunities. The other churches say that it is too early to tell but in the past there were too few people involved and they tended to burn out.

Strengths

Congregations varied in their response to this question. One indicated that their actions had been easy for people to participate in and therefore they have had a strong response. Another says that their social action members are very dedicated and knowledgeable and know how to get things done. The final congregation said that their working group model works well for the independent nature of many Unitarians.

Honouring and Rights and Privileges accorded to Social Responsibility activities

The congregations used some of the following:

- Their newspaper, newsletters, congregational meetings and from the pulpit
- The political nature of social action activities concern some congregations and Social Responsibility Committees. Some have dealt with this through having activities carried out in the name of the Social Responsibility Committee not in the name of the church or congregation.

Funding social responsibility projects

One of the congregations allocates 4% of the pledges to social action. Another allocates 3% and most allow special Sunday collections a few times a year. The congregations all allow and encourage fundraising for special activities.

There is a range of the amount of money spent on the area of social responsibility

- One congregation indicated that they spent approximately \$64,000
- Another indicated that they spent approximately \$8,600
- The final group indicated they spend about \$20,000 through special fundraising