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## Context

- Over 80 members attended an EC workshop on 'Membership Sustainability' at the GA annual meeting in April 2023. While there was a great deal of anxiety and frustration about falling membership, attendees also discussed a range of positive themes and opportunities for rejuvenating their congregations and reversing the decline.
- Notes from District Zoom meeting in 2023
  - *Districts need to find a way to give hope to the movement – the Unitarians of the future will not be like the Unitarians of the past and we need to confront that and move with it.*
  - *Resources and capacity – at present the same people are doing too many of the jobs, energy is fading. We just cannot do it all, there is a disconnect between what is needed and what is available.*
  - *We are running on the spot with no capacity to go forward in the same way. Let's be real about that. There will be a downward spiral if we carry on in the old patterns.*

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## GA Response

- To rejuvenate the Unitarian movement in the UK into a sustainable and vital future, we must reinvigorate existing processes and build new capabilities. This will require innovation in the way we do things to secure a strong future.
- Collectively, we have a huge store of resources, but we are not currently using them to our best advantage.
- The EC is proposing to designate a Unitarian Sustainability Innovation Scheme [*working title – name tba*] using £1.5m of the GA's own funds to 'match' funds from other sources including Districts and Congregations. (i.e. the total investment by the movement will be up to £2.65m over 7 years including £0.92m from all participating Districts' funds)

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## The Scheme

- Congregations will be able to apply to the fund for grants to invest in people – that is, to employ or contract with people who can help them innovate in the way they develop, communicate and deliver an engaging and rewarding spiritual and social experience for current and new members.
- Ideally, two or more congregations will collaborate in a joint project, maybe with robust and thriving congregations supporting and encouraging emerging congregations.
- District support will be critical to success and a condition to attract the match funding from the scheme.

## Examples

- A group of Congregations could apply for funds to recruit a new full time Minister who has innovative plans for developing local Ministry to reach beyond the current membership.
- The scheme could pay for a full-time administrator for several Congregations, with the aim of improving revenue by innovative use of buildings, assisting the Trustees with accounting and day to day financial management, and freeing up time for Ministers or other leaders to increase community engagement.
- Or maybe a group of Congregations wants to commission advice on developing a clear and innovative “Welcome” message, provide training for volunteers and enhance communication with the broader community, including paying for various events to focus engagement with existing and potential new members.

NB These are just suggestions, **not prescriptions**. The scheme would be open to all innovative ideas for building capabilities for rejuvenating and growing our movement

## Project grants (NB these are broad categories for example – actual amounts will vary)

- A - Long term (up to 5 years) Innovation grants of up to £50,000 per year for multi congregational new capacity building programmes
- B - Short term (2-3 year) grants of up to £45,000 as 'Pathfinder grants', aimed at District(s) innovative thematic work, and multi-congregational networking on shared topics
- C - One off Impact grant of up to £20,000 for innovative campaigns e.g. to extend the reach of a successful programme to more congregations
- D - Development grants (up to £5,000 in one payment at PM's discretion) to cover the cost of research or other assistance for a group of congregations to submit a full proposal for an A, B or C grant

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## Funding

- Total project costs **could** be funded as follows:
  - 50% from GA reserves (the Match funding)
  - 40% from District reserves *or other sources e.g. a grant giving charity or individual donations*
  - 10% from Congregations
- The congregations' funding contribution may be in cash, or it can be 'in kind', e.g. by putting a value on facilities donated or volunteer time contributed to the project.

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## Scheme Administration

- The scheme will be run by a Programme Manager who will be funded by the GA and report to the Chief Officer. As well as administration, their role will include supporting and encouraging potential projects to successful applications, and funded projects to successful completion.
- The application form will be available online and bids can be submitted either online or on paper at any time.
- Every A, B or C application will be reviewed by an Assessment Panel of three people, randomly allocated from a pool of Assessors to be recruited from across the Unitarian movement, and perhaps also from beyond (e.g. the Quakers, or non-faith community organisations)

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## Criteria for successful bids

- When evaluating a proposal, the assessment panel will focus on three areas. A grant application will need to persuade assessors that a project shows:
  - A demonstrable, positive and sustainable impact on the individual congregation(s) concerned, beyond its current membership
  - A demonstrable, positive and sustainable impact on the wider Unitarian movement
  - A clear and convincing implementation plan

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## Questions so far...

- Capacity for implementation?
  - Getting projects developed
  - Relying on volunteers
  - Involving smaller congregations
- Value for money?
  - Lessons from 2020 project (see separate slides)
- Affordability?
  - Reserve policy
  - District financial capacity
  - Guaranteeing forward commitments

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## Suggestions so far..

- Project Context , Vision & Purpose – why this project now?
  - *I hope the application will include what the ethos and values of the applicant(s) are, which this new way of 'doing religion' will aim at, and hopefully encompass.*
  - the vision of any applicant(s) needs to go beyond the broad and noble aim of wanting to 'save' Unitarianism for the next generation
  - What are the GA Object and Unitarian Universalist principles and values projects will home in on?
- Scheme name 'Innovation Challenge Scheme' 😞
  - Possible change to 'Sustainability Innovation Scheme'
  - OR 'Strong Futures Scheme'
  - OR ..... Please suggest alternative 😊
- Project Manager's role
  - Training for applicants
  - Building assessor / application assistant team
  - Light touch but effective monitoring
  - Signposting to external resources
  - Support for failing / ending projects

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## Lessons from 2020 project – JB's observations from report and discussions with participants

1. There's a perception that money was wasted – however it was a pledge model and quite a lot was not drawn
2. As a single 'testbed' project everyone was watching to see if it worked – this led to 'fear of failure' inertia
3. Overdependency on single Lead person
4. A narrow MoU prevented adaptation when the project was drifting off the original plan

### • Take aways

1. Start with a broad team
2. Do multiple projects at once
3. Focus on outcomes not milestones
4. Resource communications to celebrate and connect projects
5. Buy in Skills and expertise where required – volunteers cannot do it all

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## The Scheme's learning from 2020

1. By insisting on collaborative bids with clear lines of responsibility I think we have avoided the 'sole operator' problem that clearly dogged this project.
2. Having a Programme Manager with a budget for development grants and a brief to help nurture projects should help weed out the weak proposals and strengthen the good
3. By having full funding agreed up front and drawn down over time provides a natural reporting and support mechanism that allows the project to evolve rather than just relying on 'milestone' based progress measures

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## Now what?

- The EC has agreed to 'proactively develop' this proposal
- NB this is 'work in progress' and subject to revision based on feedback
- If there is sufficient support, we hope to move to recruiting a Programme Manager in 2024 and formally launching the scheme in 2025
- In the meantime, I'd be happy to participate in any discussions on potential projects – [jbates@london.edu](mailto:jbates@london.edu)

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## GA Messages

1. We have a choice: to act now or do nothing and manage decline
2. The GA/EC doesn't have answers to all the questions.
3. Ideas and support from across all Unitarian communities are essential in helping us find answers together. Working together is essential as it's in all our hands.
4. We should co-design processes for the scheme so that we balance the need for accountability alongside with what has a chance of working in reality
5. It's crucial that congregations engage in the open and ongoing dialogue, even if they don't end up putting in an application.
6. We (GA/EC/project partnerships) won't always get everything right and that's why we need your engagement – to make it as fair, collaborative and successful as we can.

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## Closing thoughts

- *And now may we have the faith in life to do wise planting that the generations to come may reap ever more abundantly than we. May we be reminded of the wise ones of old who admonished, 'If you plan for one year, plant grain; if you plan for ten years, plant trees; if you plan for centuries, plant souls.' May we be bold in bringing to fruition the golden dreams of human kinship and justice. This we ask that the fields of promise become fields of reality.*

V. Emil Gudmundson, 'The Fields of Promise' in *One and Universal*, edited. by John Midgley, Skinner House Books, Boston, 2002, p53.

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