

# Evaluation of the UUCF Membership Function

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## Executive Summary

This report presents the Program Evaluation Committee's (PEC) assessment of the Membership function at the Unitarian Universalist Congregation of Fairfax (UUCF). The following questions framed the evaluation:

- What is the current status of UUCF's membership-focused professional staffing and volunteer efforts? What do current staff members and volunteers see as their role, and what goals are they hoping to reach through their work?  
Specifically: What do current membership-focused staff and volunteers see as particularly successful in their recent work? Where do they see room for growth in UUCF membership efforts?
- How do comparable congregations structure their membership efforts, both in terms of professional staffing and volunteer efforts? What successes have they seen related to different structures? What challenges have they faced? Have any churches seen their congregations grow as a direct result of membership programs or initiatives?
- Given all the above, what is the best way for UUCF to structure its professional staff, volunteer leaders and committees to best meet these three goals:
  - a) Increase the number of people connected to UUCF;
  - b) Strengthen connections and deepen relationships among existing members both to each other and to the congregation as a whole; and
  - c) Develop the necessary leadership qualities, knowledge and desire among current members to maintain a qualified pool of candidates for lay leadership.

Findings and recommendations from the evaluation are as follows:

### **Membership function**

***Finding:*** The membership function, which focuses primarily on welcoming visitors and guiding them toward becoming formal members of the congregation, operates smoothly and effectively.

***Finding:*** The membership function includes no formal structure for helping existing members deepen their connection to the congregation.

***Recommendation:*** UUCF should explicitly broaden its definition of membership, seeing it as a continuum (such as the Unitarian Universalist Association's (UUA) Spectrum of Faithful Relationship), with programming oriented toward both new and existing members.

### **Staffing**

***Finding:*** UUCF's current organization for the membership function is similar to many other UU congregations, but there are examples of other effective ways to structure the role and portfolio of the membership professional to help promote congregational growth.

**Recommendation:** Following the retirement of the current Member Services Coordinator, UUCF should create the new position of Minister or Director for Congregational Life, preferably as a full-time position, with responsibility for the entire membership continuum.<sup>1</sup>

### **Volunteers**

**Finding:** The UUCF Membership Committee's current mission focuses on assisting new attendees to become formal members. However, this model is becoming outdated, as membership professionals in some congregations have taken on some of the roles previously played by volunteers. Those congregations have begun to restructure volunteer roles assisting with the membership function and have seen improvements in effectiveness and efficiency as a result.

**Recommendation:** In the short term, the Membership Committee should continue to pursue its established processes and programming to guide visitors toward becoming members. In the longer term, as the congregation adopts a broader definition of membership as a continuum, the mission of the Membership Committee, along with its activities and responsibilities, should also broaden to include the full range of membership efforts, assisting the new Minister or Director of Congregational Life in carrying out his/her responsibilities. Further, the Membership Committee should consider alternatives to its current structure, looking to other congregations for inspiration in how to attract a diverse group of participants supporting the membership function in task-oriented groups.

**Finding:** The position of Lay Minister for Membership and Outreach is neither currently defined nor well-integrated into UUCF's membership function.

**Recommendation:** The Lay Ministers Council should create and regularly review a position description of the duties and responsibilities of the Lay Minister for Membership and Outreach, seeking to integrate the position fully into UUCF's membership function (for example, the Lay Minister could simultaneously serve as leader of the Membership Committee) or, alternatively, abolish the position. We recommend that the new Minister or Director of Congregational Life, the current and immediate past Lay Ministers for Membership and Outreach, and the Lay Ministers Council discuss and determine the future of this role.

### **Levels and Goals**

**Finding:** After a near high in February 2013, UUCF membership declined and plateaued at a level approximately 40 to 50 members lower than in 2013. No Washington, D.C., area UU congregation, except All Souls, has shown a pattern of substantial growth over the period 2009 to the present.

### **Best Practices for Congregational Growth**

**Finding:** All UU congregations interviewed that are experiencing sustained growth have in common the following membership best practices:

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<sup>1</sup> This change will necessitate transferring the Member Services Coordinator's non-membership-related administrative support functions to other staff.

- Focusing on maintaining and growing a healthy religious community of shared values;
- Employing a membership professional;
- Emphasizing the spiritual development of congregational members;
- Taking a holistic approach to the membership function;
- Creating a culture of engagement with visitors;
- Promoting involvement in the congregation by people who may not wish to become formal members; and
- Identifying and tracking all the places and events where people first become connected to the congregation.

**Recommendation:** The new Minister or Director of Congregational Life and other congregational leadership should consider the best practices of other congregations and adopt, as appropriate, those that are not currently in use at UUCF. The best practices and examples of ways UUCF can implement them include:

- Focusing on maintaining and growing a healthy religious community of shared values:
  - All activities at UUCF, membership-related and otherwise, should maintain a commitment to our UU principles and values.
- Employing a membership professional:
  - As recommended above, UUCF should create the full-time position of Director or Minister of Congregational Life, responsible for the entire membership continuum, that is, for both newcomers and established members.
- Emphasizing the spiritual development of congregational members:
  - According to Lori Emison Clair, the former Director for Congregational Life at First Unitarian Church, Des Moines, IA, and now a membership consultant for UU congregations, helping people grow spiritually is vital to keeping people from leaving; churches are not political organizations, and must satisfy the needs of members for spiritual growth as well as being involved in social justice or other work. UUCF should offer visitors and members an opportunity not just to do the work of social justice, but also to feed and heal their own spirits and our collective spirit.
- Taking a holistic approach to the membership function:
  - In approaching questions of growth, UUCF must look at the various drivers of membership: For example, is RE offering what families need? Do our worship services allow people to nourish their spirits? Do people feel welcomed by and connected to one another? Is our space, including our parking lot, adequate for the number of people we serve? Will we need to add a third service to accommodate growth?
- Creating a culture of engagement with visitors:
  - UUCF's current processes for taking people from visitor to member status work well. However, the involvement of the entire congregation in the act of welcoming newcomers should be increased. This may involve the creation of new volunteer groups (such as "Green Cup Watchers," whose role would be to greet visitors during

- coffee hour) as well as emphasis from the pulpit and in adult programming on how all members can play a welcoming role, whether they are formal membership volunteers or not.
- Promoting involvement in the congregation by people who may not wish to become formal members:
    - UUCF has several routes to participation in the congregation, which are not currently addressed by formal membership processes. For example, Science, Reason and Religion attendees may not all wish to become formal members - but they might be interested in attending other UUCF events and be willing to make a pledge as a “friend” of the congregation. Such a path should be explicitly offered to them. Regular attendees at other UUCF events, as well as those who use our campus as tenants, might be offered similar opportunities.
  - Identifying and tracking all the places and events where people first become connected to the congregation:
    - As noted above, UUCF has many groups that use its campus, and many events besides Sunday morning worship services. UUCF should identify all the places where people first “connect” to the congregation, place voluntary “sign-in” sheets at such places, make information available regarding what it means to be a member or friend of UUCF, and follow up with individuals who attend these events.

### **Continuum**

***Finding:*** UUCF's formal strategic mechanisms for helping new and existing members make connections among themselves and to the congregation as a whole are insufficient.

***Recommendation:*** The new Minister or Director of Congregational Life should consider various options, including the best practices of other congregations, for enhancing connections within the congregation, decide which are applicable at UUCF, and carry out a plan to implement them.

***Finding:*** UUCF’s mechanisms for growing leaders are not well developed. Some efforts are underway to make leadership selection and preparation more intentional and inclusive, but views are mixed as to how successful they will be.

***Recommendation:*** The Minister or Director of Congregational Life should develop and implement programming to strengthen leadership selection and preparation. Additionally, the new Minister or Director of Congregational Life should, in conjunction with the Leadership Development Team, carefully consider the latter’s forthcoming report.

## Membership Function at UUCF

### 1. Introduction

The UUCF Governance Manual states (section VII.E.2) that “[t]he Board shall engage in comprehensive review of programmatic areas of the Congregation on a multiyear 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) decided that program reviews should be conducted by the CT, with reports submitted to the Board for review. Thus, the PEC is a subcommittee of the CT.

The CT recommended to the Board that the membership function be made the subject of the current evaluation for several reasons:

- The definition of membership for Unitarian Universalism and other denominations is evolving. The PEC will look at how other religious institutions are attracting and retaining congregants.
- UUCF membership numbers have plateaued in recent years. The PEC will investigate strategies to help UUCF grow.<sup>2</sup>
- UUCF’s Member Services Coordinator Carol Jensen has announced she will retire by September 2017. Carol has been a key part of the congregation’s membership efforts for more than a decade, during which time UUCF had grown significantly. The PEC will look at the best staffing and leadership for this program going forward.

The Board approved the CT’s recommendation that the membership function be evaluated. The PEC conducted this evaluation during the fall of 2016 and the winter of 2017.

If you aren’t familiar with the process of becoming a member at UUCF, we suggest you read section 7 (The Membership Continuum at UUCF) first.

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<sup>2</sup> Maintaining an active and engaged membership is vital to the operation of the congregation. UUCF funds 75-77% of its annual operating budget through member and friend pledges. About 5% is funded through other contributions by members and friends including plate collection. The remainder is funded through rental and other income.

## 2. Who is a member?

### *UUCF*

UUCF defines a "member" as someone who signs the membership book and makes an annual pledge or contribution to the operating fund<sup>3</sup>. In addition, UUCF maintains records of three other membership related categories:

- "Friends" are people who pledge but do not wish to sign the membership book;
- "Associates" are people who participate occasionally in congregational activities but no longer meet the financial obligations of membership;
- "Religious Exploration (RE) parents" are parents who pay a fee for their child/children to attend RE but do not otherwise contribute to the operating budget.

As of March 7, 2017, UUCF has 697 members, 121 friends, 225 associates, and 86 RE parents. However, throughout this report, we will refer to the 2017 number certified to the UUA in February, 691.

### *Other UU Congregations*

All congregations interviewed<sup>4</sup> formally define membership the same as or similarly to UUCF. Specifically, individuals become members by signing the congregation's membership book and committing to make a financial contribution at least annually. Most congregations have a waiver policy for those members who may not be able to contribute financially. Others do not: Jefferson Unitarian Church in Golden, Colorado, for example, no longer grants waivers, and all of its members are expected to financially contribute some amount every year.

Several congregations interviewed, however, expand their formal definition of, or requirements for, membership beyond signing a membership book and making a regular financial contribution:

- Cedar Lane UU Church in Kensington, Maryland, has a Member Emeritus category that grants membership privileges to long-standing members without the need for an annual contribution. Such members, given their age or circumstances, may not be able to contribute financially but otherwise wish to stay connected to the congregation. Such members are nominated by the ministers and approved by the Board of Directors.
- The First UU Church of San Diego adds a requirement for new members to sign a Bond of Union in addition to signing its membership book and making an annual financial contribution. The Bond of Union includes statements about the church's goals and mission,

<sup>3</sup> Members can request a waiver, if a financial contribution is not possible in a given year.

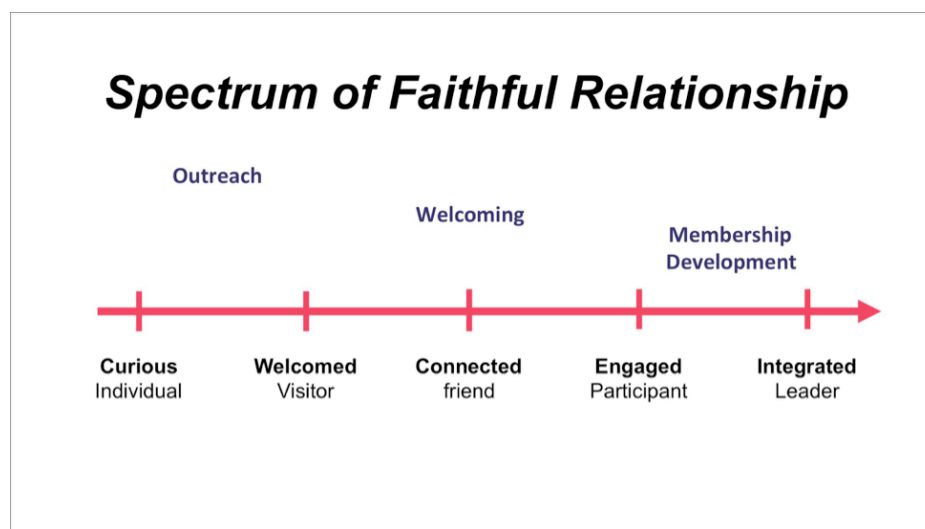
<sup>4</sup> The PEC interviewed the lead membership professional in nine other UU congregations across the country. Please see Appendix A for details.

the principles of Unitarian Universalism, and the responsibilities of membership. (A copy of the Bond of Union is included in Appendix D.)

Beyond the formal definitions, a majority of congregations interviewed view membership as a continuum or spectrum that runs from first-time visitors, through active members, and to committed lay leaders. Cedar Lane UU Church sees this as a combination of the UUA's philosophy and teachings from the "Simple Church" Christian approach. The UU Church of Greater Lansing, Michigan, views membership as a "Circle of Belonging," versus a more linear spectrum, with members engaging at different points in the circle depending on their life circumstances at a given point in time.

## **UUA**

The UUA's Outreach Director, Corey McDonald, illustrates the membership spectrum as follows:



Whether defined as a linear spectrum or a circle, the membership function in this sense is the sum total of all activities that focus not only on the "front end" of the membership process, which involves attracting visitors and supporting them in becoming members, but also on related programs or efforts designed to engage existing members and deepen their connections to the congregation. Defining membership in this way acknowledges that individuals are at different places with different needs along a continuum or spectrum at a given point in time.

Recently there has been discussion at the national level of changing the definition of membership among the member congregations of the UUA. The UUA Moderator's Covenant Task Force is currently looking at how to move away from the current membership model to a model based on being in covenantal relationship together as an association of congregations



and between congregations. The task force anticipates that a conversation about the meaning of membership at the association level will naturally lead to a conversation about how that model could transform the membership model within congregations. However, at the moment, it is unclear how and whether the task force will have specific recommendations for individual congregations. This task force is expected to convene at the 2017 General Assembly in an effort to create further discussion and feedback followed by specific recommendations at an undetermined time in the future to the UUA Board. Several of the ministers we spoke with (including our own) are interested in making a similar shift occur in their own congregations, but no one has specific ideas at this time for what this shift would actually entail. The PEC notes that the recommendations of the Covenant Task Force should be carefully reviewed and considered when its report becomes available.

### 3. Organization of Professional Staff

#### *UUCF*

#### **Current Staff Structure**

**Member Services Coordinator.** Prior to June 2007, the membership function was largely run by volunteers, with staff member assistance on some administrative tasks. In June of 2007, a 30-hour-per-week Member Services Coordinator position was created. The incumbent reports that she spends about two-thirds of her time--about 20 hours per week--directly supporting membership. Her membership responsibilities include:

- Welcoming visitors on Sunday mornings;
- Following up with visitors;
- Running Newcomer Orientations and Membership Classes;
- Working with current members (primarily through email)
- Maintaining the member database; and
- Working with the Membership Committee.

**Administrative Coordinator.** The Administrative Coordinator also supports UUCF's membership function. She answers the phone and addresses new members' and visitors' questions if the Member Services Coordinator is not in the office. She schedules people to work each Sunday at the Welcome Table.

**Ministers.** The Associate Minister supervises the Member Services Coordinator and the Lay Minister for Membership and Outreach. She alternates attending Newcomer Orientations and Membership Classes with the Senior Minister. She attends occasional Membership Committee meetings.

### ***Other UU Congregations***

The majority of congregations interviewed organize their professional staff supporting membership in approximately the same way as UUCF, but there are several key exceptions involving the scope of portfolios. All congregations interviewed rely heavily on a key individual – either an associate minister or staff member – to perform a full range of membership activities, especially those involving visitors and new members.

Most of the staff members interviewed who lead membership activities work part time between 20 and 30 hours per week. Their primary responsibilities, which collectively can be termed “membership programming” and “volunteer coordination,” broadly include:

- Overseeing and coordinating the activities of a volunteer membership committee or volunteers involved in staffing a sanctuary greeting table;
- Meeting personally with visitors and helping them establish connections with other members;
- Performing various administrative tasks (e.g., managing the membership database, making nametags, arranging food for visitor receptions);
- Carrying out follow-up contact with visitors through phone calls, emails, or letters;
- Planning, conducting, and/or overseeing new member programming, such as visitor receptions, “UU 101” or Path to Membership courses, and new member orientations; and
- Planning and carrying out new member recognition ceremonies.

The following table outlines how other UU congregations describe their lead staff member who is responsible for carrying out membership duties, along with the current membership level. UUCF is included for comparison purposes.

Congregation	Size <sup>1</sup>	Title of Lead for Membership	Hours/Week or Full Time
UUCF	700	Member Services Coordinator	30
UU Congregation of Arlington, VA	839	Director of Congregational Life	30
River Road UUC, Bethesda, MD	561	Director of Membership & Outreach	30
Cedar Lane UU Church, Kensington, MD	735	Interim Associate Minister <sup>2</sup>	FT <sup>3</sup>
First UU Church of San Diego, CA	660	Connections Coordinator	20
Jefferson Unitarian Church, Golden, CO	825	Membership Coordinator	Various
Unity Church - Unitarian, St. Paul, MN	900	Minister of Congregational and Community Engagement	FT
UU Church of Greater Lansing, MI	325	Connections Coordinator	20
Unity Temple, Oak Park, IL	587	Membership Director	FT
Fox Valley UU Fellowship, Appleton, WI	704	Congregational Life Coordinator	FT

<sup>1</sup>Figures provided by congregations are approximate and do not include pledging friends.

<sup>2</sup>Position title was formerly Minister for Congregational Life.

<sup>3</sup>Cedar Lane is currently recruiting for a part-time (18-20 hours/week) Membership Director.

As the table shows, different congregations use different titles to describe the minister or staff person who leads membership activities. There is no direct correlation between a person's title and the scope of his/her responsibilities. Most work part time, and their portfolios are similar to UUCF's part-time Member Services Coordinator. However, there are several significant exceptions:

- Unity Church – Unitarian of St. Paul, Minnesota has a full-time Minister of Congregation and Community Engagement whose responsibilities include membership as well as programming for social justice, small groups, and adult education. She also serves as

part of the church's executive team. The position is aided by a regular part-time volunteer who assists with administrative duties. There is no volunteer committee dedicated to membership. As part of a growing congregation, this minister stands at the intersection of all major activities in the congregation, helping visitors, new members, and established members connect with activities that they are interested in or services that they need. She jokingly refers to herself as being a traffic cop every Sunday, holding flags in the middle of this "intersection" within Unity, helping to make introductions and connections between people.

- Fox Valley UU Fellowship of Appleton, Wisconsin has a full-time Congregational Life Coordinator who directs or oversees membership activities across the full continuum of membership. This includes efforts to attract visitors and help individuals and families along the path to membership, as well as efforts with established members to help them deepen their connections to the church. In particular, this includes a leadership development class every other year for congregational leaders and potential leaders. The class averages 10-15 people each year, and is based on the UUA's Tapestry of Faith Curriculum, *Harvest the Power*<sup>5</sup>.
- Unity Temple of Oak Park, Illinois has a full-time lay Membership Director who carries out membership activities across the entire congregation. In addition to overseeing hospitality, greeting visitors on Sunday mornings, running newcomer classes, and working with the lay membership committee, she serves as the point person in the church for making connections. She helps build community by connecting people when she sees a need, and creating opportunities for interaction, for example, by recently establishing a playgroup for new mothers.

Two congregations interviewed have changed the title of their staff positions from Membership Coordinator to Connections Coordinator. The changes were made to emphasize creating and deepening connections among visitors, new members, and established members with less emphasis on "membership," per se, as a goal of the position. In particular, the First UU Church of San Diego made this change as a result of not wanting to "push" membership on visitors (along with the attendant administrative forms and tracking efforts), but instead to emphasize forming connections with visitors first and allowing growth to occur more organically.<sup>6</sup>

## **UUAMP**

The Unitarian Universalist Association of Membership Professionals (UUAMP), formed in 2011 to help establish and support the membership profession in UU congregations, recommends that the membership function be led by a membership professional, defined as someone with,

<sup>5</sup> "The program's 12 workshops offer opportunities for both new and experienced leaders to enrich the skills they bring to their leadership and to experience their leadership journey as a Unitarian Universalist faith journey." For more information, see <http://www.uua.org/re/tapestry/adults/harvest>.

<sup>6</sup> The congregation was also supported in this view by an article in the fall, 2016, edition of *UU World*, entitled, "It's About More Than Membership." <http://www.uuworld.org/articles/its-about-more-membership>

or planning to seek, formal membership training and/or certification. UUAMP identifies three levels for UU membership professionals: Coordinator, Manager, and Director. Each has its own definition of activities, hours per week, and salary level. These definitions are included in UUA's Job Capsule Descriptions.<sup>7</sup> UUAMP has recently designed a pilot certification program.

## 4. Organization of Volunteers

### *UUCF*

**Membership Committee.** According to its charter, "[t]he mission of the Membership Committee is to welcome newcomers and promote their introduction to and engagement with the UUCF community and its broader mission to grow, connect and serve." The chair of the Committee reports to the Lay Minister for Membership and Outreach, who is a Committee member. The Committee meets quarterly.

The primary responsibilities of the Membership Committee are to:

- Staff a Welcome Table for each service on Sunday mornings;
- Hold monthly receptions following Sunday services;
- Participate in periodic Newcomers Classes;
- Arrange for annual Anniversary Dinners; and
- Seek to identify factors that strengthen or impede UUCF from being proactively welcoming and propose and implement appropriate actions.

**Sunday morning Welcomers.** This pool of 30 people staffs the Welcome Table on Sunday mornings, handing out information packets, taking down visitor contact information and answering questions about the congregation. They are also asked to follow up personally with guests, by phone or email, after their first visit. Typically, Membership Committee members are also Welcomers.

**Lay Minister for Membership and Outreach.** The responsibilities of the Lay Minister for Membership and Outreach are less clearly defined than those of the Membership Committee, at least in part because there is no position description.<sup>8</sup> The main duties, as conceived by the immediate past Lay Minister were to:

- Assist the Membership Committee as an active member;
- Write press releases; and
- Coordinate participation at community events.<sup>9</sup>

<sup>7</sup> [http://www.uua.org/sites/live-new.uua.org/files/capsule\\_job\\_descriptions\\_17-18\\_final\\_012017.pdf](http://www.uua.org/sites/live-new.uua.org/files/capsule_job_descriptions_17-18_final_012017.pdf)

<sup>8</sup> The Associate Minister has identified the development of position descriptions for all Lay Ministers as a priority.

<sup>9</sup> The past Lay Minister is continuing in some of his outreach roles although he is no longer Lay Minister.

Both the past and current Lay Ministers emphasized the need to devote more attention to helping new members become integrated into the UUCF community.

### ***Other UU Congregations***

Although the specifics vary widely, the majority of congregations interviewed have one or more membership committees (or equivalents) that assist in a range of membership efforts. The membership committees are almost exclusively focused on task-oriented duties involving visitors and regular attendees who are exploring membership. Such duties generally include hosting a Welcome or Greeting Table in the Sanctuary to meet visitors before Sunday services; following up with visitors through letters, phone calls, or emails; working with the membership professional or minister to carry out visitor receptions; and assisting with a variety of programming, such as “UU 101” or Path to Membership courses, new member orientations, and formal welcoming ceremonies. Specific information on how other UU congregations organize their volunteer membership groups is included in Appendix B.

Several large congregations do not have formal membership committees but have opted instead for smaller, lay-led groups focused on a particular aspect of membership (e.g., Greeters, Connectors). These groups, in turn, tap into a larger pool of volunteers to help plan and carry out membership activities. These changes were generally made to help achieve one or more of the following goals:

- Reduce the need for a formal membership committee. Many congregations cited the difficulty of finding people with the ability to volunteer for a committee, given other priorities in their lives and overall claims on their time.
- If a membership committee exists, reduce the amount of time people spend in meetings and increase the amount of time actually spent on membership activities (as one congregation put it, “less meeting, more doing”).
- Bring a greater focus to making connections among visitors, new members, and existing members, as opposed to placing an emphasis on membership, per se, and its related administrative tasks.

Two congregations do not have membership committees due either to their governance policy or their traditions and culture. Cedar Lane UU Church of Kensington, Maryland, is an example of the former. It adopted a governance by policy framework several years ago, with ministry teams of church lay leaders replacing committees. Cedar Lane’s Membership Ministry Team (MMT) replaced its membership committee to carry out both membership planning and the full range of membership programming. The MMT is overseen by the church’s current Associate Minister, and will be overseen by a new part-time Membership Director.

Unity Church – Unitarian of St. Paul does not have a membership committee because its tradition remains one of having its ministry teams or professional staff directly lead all of its major activities or church functions. Staff, in turn, tap into and direct volunteers to assist with church activities.

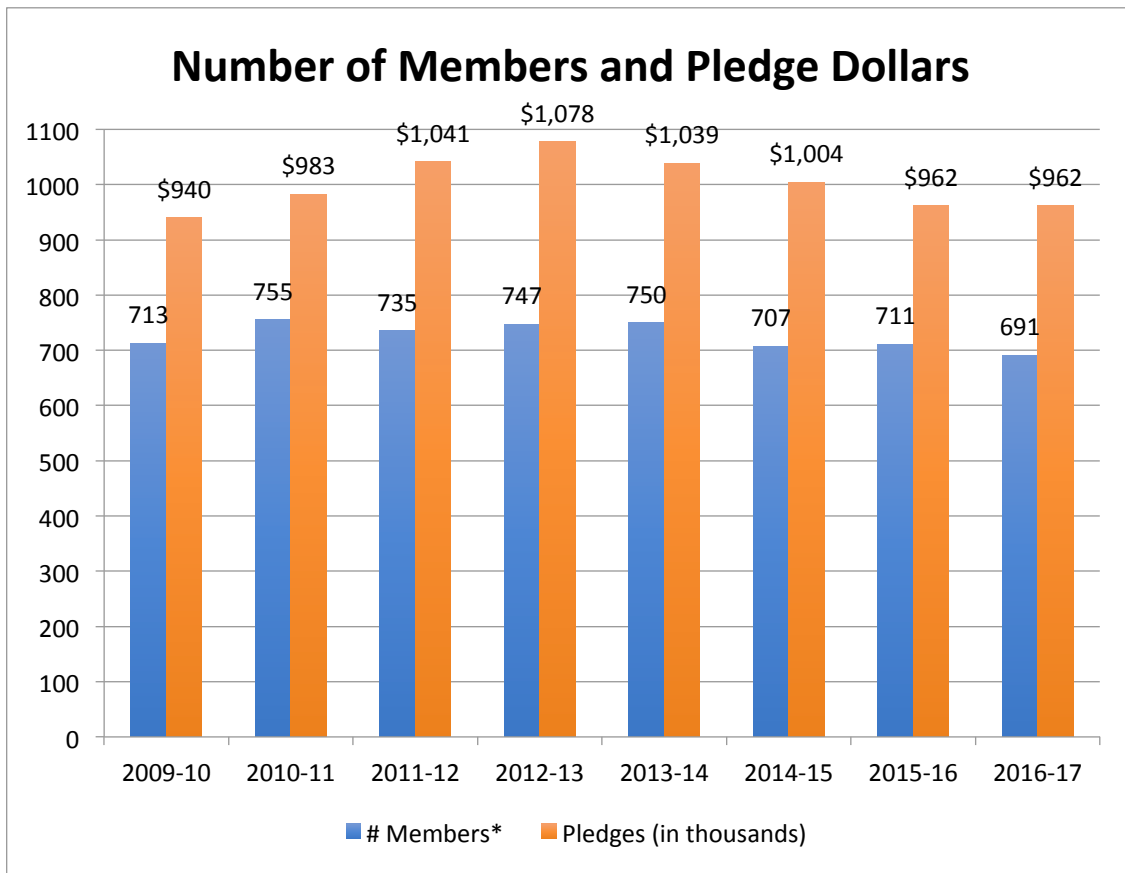
## 5. Membership Levels and Goals

### *UUCF*

To be in a position where the PEC feels comfortable making recommendations about the restructuring of UUCF's membership function, it seems essential to first have an understanding of the numerical facts around membership over the last several years. To that end, the PEC looked at the number of certified members, worship attendance, pledge dollars, and numbers of new and departing members. We also looked at trends in membership at other Washington, D.C. area UU congregations to gain some context for our own situation.

When looking at these numbers, it is important to recall a few significant dates in our congregation's recent history: Rev. Mary Katherine Morn departed at the end of the 2013-14 congregational year, Rev. Jennifer Brooks served as Interim Minister in 2014-15, and in August 2015, Rev. David Miller became Senior Minister.

### History of Membership and Pledge dollars

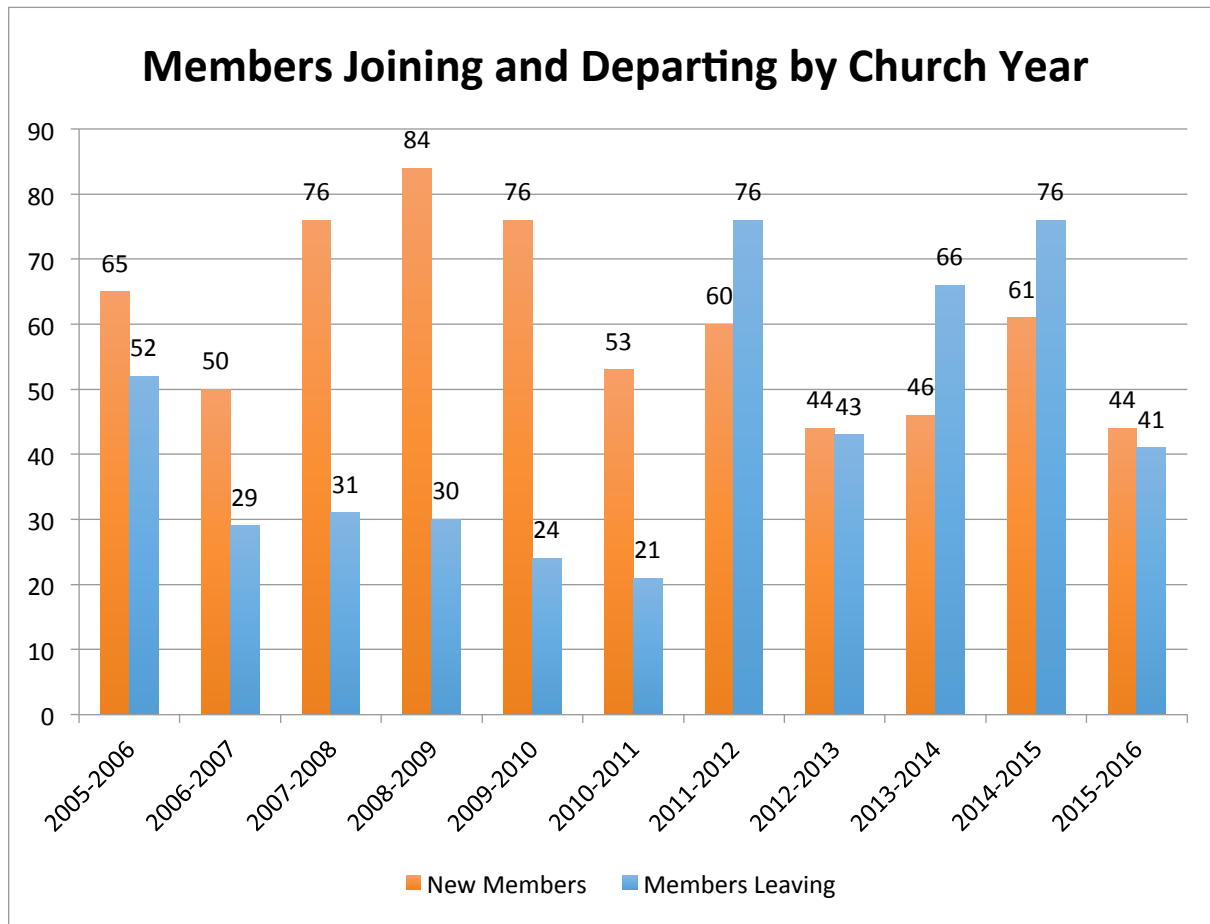


\* Number certified to UUA in February of each year

The above chart displays the number of members UUCF had each church year (July-June) as well as the total pledge dollars, in thousands. The number of members reached 755 in 2010-11, fell slightly, then was back up to 750 in 2013-2014. It has steadily decreased since that time (though as of March 2017, UUCF has 697 members, slightly up from the February 2017 number). Pledges have decreased since 2012-13, except for the last two years, when they have remained constant.



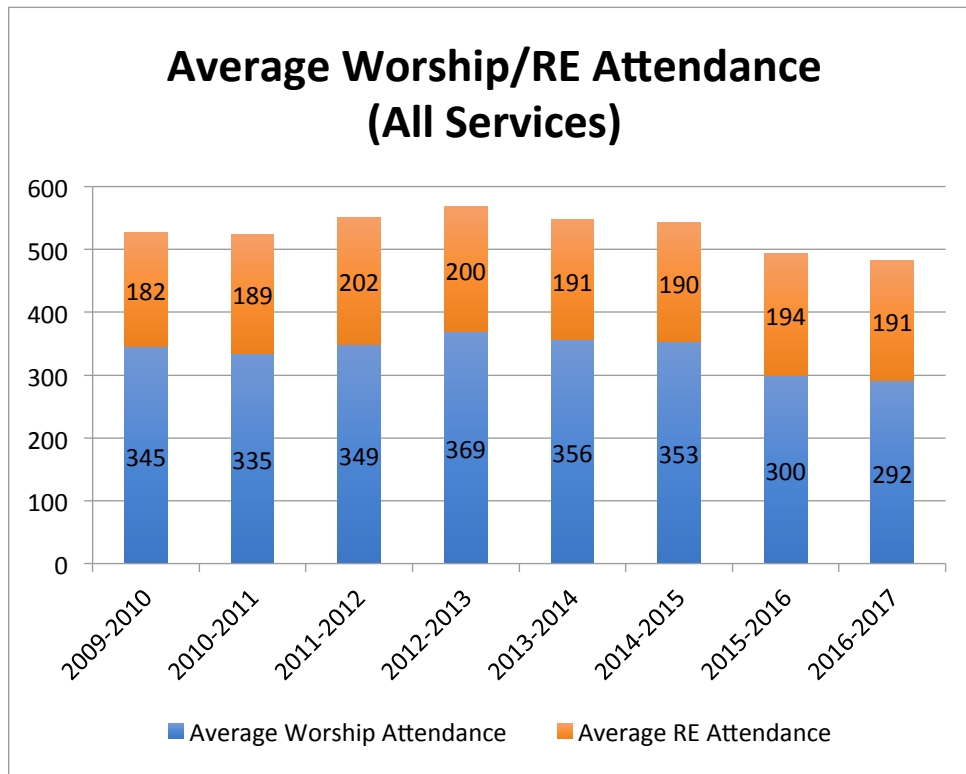
### History of New and Departing Members



The chart above shows the number of new members joining each year, as well as the number of members leaving. Note that these numbers do not perfectly match with the member numbers in the previous chart. “Members leaving,” in particular, is a difficult number to calculate because most people do not formally announce their departure; they simply little by little stop attending and pledging. The “members leaving” numbers come from the Member Services Coordinator's database, her knowledge of events such as moves, deaths, and other departures and from the Director of Administration's regular review of received contributions to the annual operating fund.

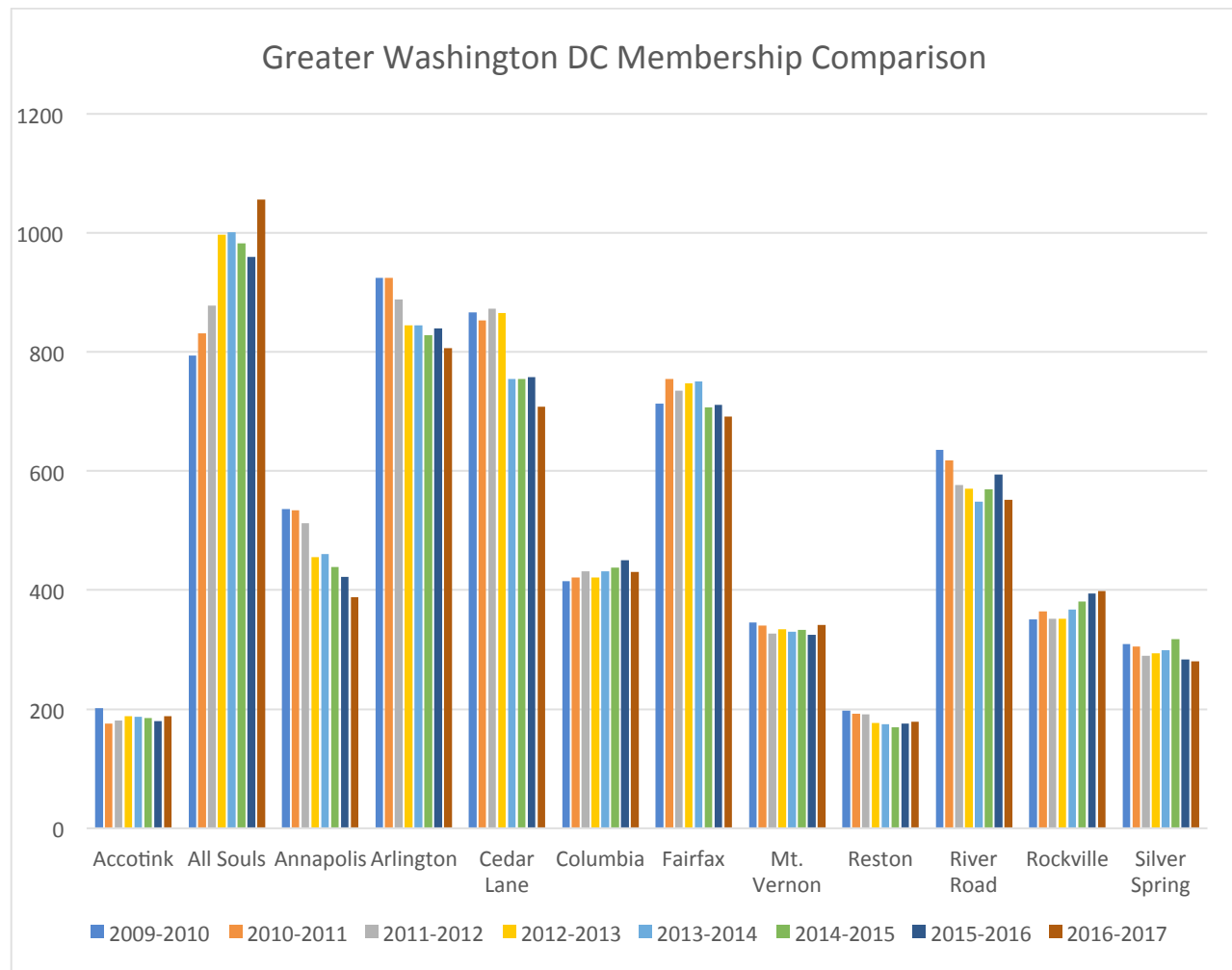
For most of Rev. Mary Katherine Morn's tenure as Parish Minister (August 2005-June 2014), joining members greatly outnumbered departing members. However, since 2012-13, this pattern has changed. Some years, the numbers have been almost the same, but during several years, departing members far outnumbered joining members. Susan Beaumont, in her book “Inside the Large Congregation,” emphasizes that the “assimilation of new members in the professional church becomes as much about watching the back door as bringing people in through the front door.” This is a statistic that should be closely monitored.

### History of Worship Attendance



The above chart shows average worship and RE attendance by year, added together across the services (Saturday, when applicable, and two Sunday services). While RE attendance over the last seven years has generally held steady, worship attendance has been steadily declining since 2012-2013.

### Recent History of Washington, D.C. Metropolitan Area UUA Certified Membership



The chart above shows membership numbers, as certified to the UUA in February of each year, for UU congregations in the Washington, D.C. metropolitan area, from 2009 to the present.

No UU congregation in the Washington, D.C., metropolitan area has shown growth in each of the last seven years. Most have held stable or shown a pattern of decline. Exceptions include All Souls in Washington, D.C., which has seen a pattern of substantial growth between 2009 and the present; Rockville, which has grown over the last four years; and UUCF, which is the only congregation with a hump curve (steady increase followed by steady decrease). These variations make it difficult to make predictions for UUCF's likely growth or decline in membership based on growth or decline of our neighboring congregations. It is clear, however, that UUCF is not alone in experiencing a decline over the last several years.

## **Membership Goals**

### **UUCF**

Currently, UUCF does not maintain numeric membership goals, but this has not always been the case. During the interim associate ministry of Rev. Russ Savage (fall 2009 to summer 2011), specific numeric membership goals were set. For the first three years of her ministry, Associate Minister Rev. Laura Horton-Ludwig continued to track these numeric goals, specifically aiming to increase not only general membership but also to increase participation in small groups.

When asked about current membership goals, both UUCF ministers spoke of the desire to increase the intercultural competency of our current congregation as the most important way for UUCF to become more welcoming and be able to grow. Specifically, Rev. Horton-Ludwig said that success in this endeavor can be measured by the number of current members who attend intercultural competency trainings. Senior Minister Rev. David Miller echoed this thought, adding that increasing our congregation's intercultural competency is one of four priorities in the new strategic plan.

### **Other UU Congregations**

The majority of congregations interviewed do not have specific numerical growth goals. Two congregations, however, are exceptions:

- UU Congregation of Arlington, Virginia, set a goal in its current Strategic Plan of achieving 1,000 members by 2021, up from approximately 850 members currently. A new Growth Group is working to identify ways to best achieve this goal.
- Cedar Lane UU Church does not have a numerical goal in its Strategic Plan, but its Associate Minister, who currently is responsible for membership activities, sets two specific goals for herself, arguing that such goals should be created and maintained to help plan for and guide growth. Her two goals are:
  - Achieving 70 new members annually, with the target number determined by historical growth figures; and
  - Achieving a conversion rate of 20-25% annually, with conversion rate defined as the percentage of new visitors that eventually choose to become members. The UUA considers a rate of 20% to be very good.<sup>10</sup>

To help achieve growth, all congregations interviewed have some type of visitor and/or new member information program. Some churches repeat a standard orientation monthly or at other regular intervals. Others, however, carry out a multi-session program that includes separate sessions on each major function or activity of the church (e.g., religious education, responsibilities of membership, UU history, adult education, social justice, and pastoral care), normally held each Sunday on a rotating basis. Several churches noted that attendance is better

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<sup>10</sup> For comparison, in 2015-16 UUCF's conversion rate was 16%.

at these sessions if they are held between services on Sundays, as opposed to a half or full day session on a Saturday.<sup>11</sup>

Several congregations use elements of "Faith Forward," a 58-session program created by the First Unitarian Church of Dallas, Texas. The 58 sessions can be broken down into smaller presentations and tailored for members at various places along the membership continuum. To use the curriculum, a church subscribes for a monthly fee that varies depending on how much of the program the church uses.

### *Successes and Challenges*

The congregations interviewed identified a number of similar membership successes. The successes include:

- Good efforts overall to greet, educate, and put visitors on a path to membership. Many expressed satisfaction that the “mechanics” on the front end of the membership continuum were working well.
- A good base of volunteers to help carry out a variety of membership activities.
- A successful small groups program, where visitors and new members are able to join 6 to 12 other new and/or existing members in focusing on a topic of mutual interest. This use of small groups helps to integrate visitors and new members into the congregation. As the interim associate minister at Cedar Lane UU Church states, such success helps to create a “sticky” church--one defined by meaningful attachments--that promotes membership growth.

However, most congregations identified more membership challenges than successes, noting that more work remains to be done in the following areas:

- Deepening connections among existing members of the congregation. Many congregations noted that they do a good job of getting people to the point of membership, but programs to engage their entire membership are not well developed.
- Coordinating membership efforts across a large congregation (or as a church grows). Examples cited by several congregations include being aware of all of the “touch points” where visitors may first connect with a congregation, given that the first “touch point” is not always a Sunday worship service; and ensuring that information collected from a visitor in one area of the church (e.g., religious education) is made known to the church’s membership team.
- Expanding the amount of time that staff or volunteers can devote to membership, given their church’s overall needs. This is especially true for part-time professional staff.
- Trying something new and letting go of what once worked, knowing that different approaches are required as a congregation goes through membership changes.

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<sup>11</sup> Unity Church – Unitarian hands out “scorecards” and colored stickers that allow visitors and new members to track their attendance through the orientation syllabus, noting that “the stickers are a big hit.”

- Overcoming instability and turnover in the leadership of professional staff or volunteers. Several congregations interviewed noted that they were in a state of flux with their membership efforts, given changes in volunteer lay leadership, making it difficult to create and maintain momentum.

## 6. Best Practices for Congregational Growth

In the course of our research, we identified multiple membership best practices or other recommendations related to church growth. These best practices, come from the congregations interviewed, the UUAMP and the UUA.

Most notably, all of the following recommendations are practiced by four UU congregations that are experiencing sustained membership growth. The four churches and their growth figures are:

1. Jefferson Unitarian Church, Golden, CO grew from 415 members to 825 (2000-17), a nearly 100% increase in membership;
2. First UU Church, Des Moines, IA grew from 240 to 520 (2004-15), a 116% increase;
3. Fox Valley UU Fellowship, Appleton, WI grew from 281 to 704 (2001-17), a 151% increase and was recently identified as one of the top 20 fastest growing UU congregations; and
4. Unity Church – Unitarian, St. Paul, MN grew from 832 members in 2008 to 904 in 2017 and indicates that it may top 1,000 total members in the next two years.

The best practices these congregations have in common are:

- Keeping in Mind That Membership Is More Than Just Numbers: All of the congregations interviewed seek not to grow for the sake of growth itself, but to maintain and grow a healthy religious community of shared values, characterized by strong connections between members and the church. Paraphrasing the words of one membership professional: I'm not interested in growing if new members aren't interested in UUism and continuing their involvement with our congregation.

If a best practice is to keep in mind that membership is about more than numerical totals, the converse is also true. According to Corie Jason, UUAMP President and Connections Coordinator for the UU Church of Greater Lansing, focusing solely on the numbers while losing sight of the relationship between new members and achieving your church's mission (or hiring a part-time staff member with the expectation to narrowly focus on recruiting more people) is one of the quickest ways to fail.

- Emphasizing Spirituality: On a similar note, the congregations emphasize that the spiritual development of its members is important to retaining existing members and attracting new ones. Paraphrasing Lori Emison Clair, the former Director of Congregational Life at the First UU Church of Des Moines, Iowa, and now a membership consultant to UU congregations, the definition of success needs to be more expansive than just the size of the membership. It is important to look at spiritual development and connections among members. Growing

spiritually is vital to keeping people from leaving. In her view, churches are not political organizations focused on social justice work, but religious bodies that must take care of people spiritually.

To help in this respect, several congregations interviewed emphasize the spiritual and relational component of their mission and vision with visitors and new members. Jefferson UU Church, for example, emphasizes its vision statement of “Deepen, Connect, Engage,” with “Deepen” defined as people growing in the depth of their spirituality, and “Connect” defined as making connections with others across the congregation. Similarly, Unity Church – Unitarian of St. Paul emphasizes the goals of “Within, Among, Beyond” in its membership work. “Within” is defined, in part, as growing spiritually as an individual, and “Among” defined as growing as part of a community.

- Taking a Holistic Approach: Multiple congregations interviewed stressed that there is no one initiative or activity – no silver bullet – that will result in membership growth. In the words of Corie Jason, “membership touches everything,” and there are multiple reasons why visitors and members decide to join or remain in a congregation. To best lay the foundation for growth, churches should look at all aspects of their congregational life that could affect membership. Things to consider include the amount of physical space (to include parking lots); quality of worship; quality of the music program; quality of the religious education program (described by multiple churches as “crucial” to enabling growth); culture of the congregation regarding the acceptance of new members; both the amount and quality of other programming; and the number of Sunday worship services needed to accommodate the size of the congregation.

Several growing congregations interviewed have tried various approaches to add a third Sunday service. Jefferson Unitarian in Golden, Colorado, tried conducting three services on Sunday morning but found that most of its members started attending only the second (or mid-morning) service. One approach, working well for Unity Church – Unitarian in St. Paul, involves a third service at 4:30 pm on Sundays. Its attendance is approximately one-half that of the Sunday morning services, but it enjoys a loyal group of attendees. It features full RE, and the choir follows a rotation schedule to perform at the service regularly. It also includes a soup supper immediately following worship to encourage attendance and fellowship.<sup>12</sup>

- Ensuring Someone Is in Charge: Another best practice identified by multiple congregations as well as the UUAMP is to have at least one staff person dedicated to membership and for this person be a membership professional, defined as having membership experience and/or credentials. This person should be full time or close to it depending on the size of the congregation. It is also recommended that this person be a visible presence in the sanctuary on Sundays between services, helping to greet visitors and make connections among them, new members, and more established members.

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<sup>12</sup> The soup supper is popular among young families. They can attend services while their children attend RE, enjoy a meal together, and then arrive home about the time their children get ready for bed. According to Rev. Lisa Friedman, this is a nice way for families to begin their week.

- Creating and Maintaining a Culture of Engagement: A number of churches stress the importance of having a culture that is positive towards visitors and can easily integrate new members into congregational life. Everyone has a role in welcoming people – not just the membership committee. In particular, two growing congregations – Jefferson UU Church and Unity Church – Unitarian – described how they were once viewed by visitors as difficult to break into and not accepting, in the large, of new people. Recognizing that this was an obstacle to growth, they made a conscious effort to educate their membership on the importance of embracing new people looking for a spiritual home. Through a combination of emphasis from the pulpit, communication through weekly newsletters, and modeling of the desired behavior during/after services, they succeeded in creating and fostering a culture of engagement.
- Emphasizing a Culture of Belonging: Several growing congregations emphasize a culture of belonging by inviting and welcoming participation in the life of the church from people who may have no interest in becoming formal members. Unity Church – Unitarian recommends that churches not pressure or emphasize membership, per se, to visitors but encourage people to take part in what the congregation offers, noting that its experience is that some of its most active people are not interested in becoming members. A church can approach such people about being “friends” and making a financial contribution.
- Identifying and Tracking All Points of Engagement: Many of the congregations interviewed work to identify all of the places or events where visitors first enter into the life of the congregation, understanding that attending Sunday worship is only one of the possibilities. They make it easy to collect data on visitors at these “entry points” by laying out visitor registration cards or other materials.

For example, Unity Church - Unitarian has a Welcome Table in its sanctuary and asks visitors to fill out information in a visitor register before Sunday services. What the church discovered was that many other people were visiting the congregation and becoming regular attendees at RE or at programs outside of Sunday services and, as a result, weren't known to the professional staff or membership volunteers, so they never got a follow-up email or call; once discovered, the situation was corrected.

First UU Church of Des Moines experienced a similar situation and dealt with it by inviting all groups that used the church's facilities-- parent groups, yoga classes, 12-step programs, etc.-- to fill out printed visitor materials and/or take a brochure about the church and UUism (e.g., have a brochure on UU for Buddhists available on a table with an attendance sheet for yoga classes). Here this resulted in an expansion in the number of people known as being active within their congregation. The expanded visitor data are now included in membership databases and mailing lists, and all visitors (not just those who come to a Sunday service) receive a follow-up email.

### *Other Best Practices*



Beyond the membership practices that all of the four growing congregations have in common, there are also efforts unique to each of the four which they believe contribute to their ability to grow:

- Emphasizing UUism to Help “Grow the Faith”: Jefferson Unitarian works to ensure its members understand that part of the church’s mission is to grow UUism. Jefferson places emphasis on explaining how unique UUism is compared with other religions or faith traditions and how it’s flexible enough to fit the needs of a broad community.
- Carrying Out Meaningful Conversations: At the First UU Church of Des Moines, Lori Emison Clair undertook a three-part process to help members establish meaningful relationships and find what they are looking for in the church:
  - *One-on-one conversations*. One-hour meetings between a newcomer and a member of the professional staff (sometimes the Membership Director, or sometimes the Music Director if, for example, a newcomer is particularly interested in music). The conversations revolved, in part, around a series of questions tied to the congregation’s ends and questions about interests of an individual or family. For example, “How do you want to be involved in social justice?” Or, “What are your hopes regarding your own spiritual growth?”
  - *Chalice Conversations*. These occurred with a group of 10-12 established members at their five-year anniversary. Similar to the one-on-one conversations, the group members explored what the church meant to them, and what they would like it to mean going forward.
  - *Face-to-Face*. On a quarterly basis, an open invitation was extended to approximately 50 people to attend lunch after First UU’s second service. People were paired off, given some starting questions and, over 20 minutes, engaged in face-to-face conversations that allowed them to get to know one another better. Then they partnered with someone else for another 20-minute conversation.
- Knowing Who Is Becoming Inactive and Checking in With Them: Unity Church-Unitarian works to increase attention to members who are not participating as much as they used to in the congregation and with visitors who may not appear to be connecting with others. Rev. Lisa Freidman’s experience is that time spent checking in with people who are becoming less active leads to reengagement and fewer people leaving the church over time.<sup>13</sup>
- Focusing on a Primary Theme Annually: Each year, Fox Valley UU’s Congregational Life Coordinator focuses on one aspect of membership. Two years ago, it was the transition that the congregation underwent to a new senior minister. She met with long-term members with the objective of increasing their awareness of what it was about the congregation they valued besides the minister. Last year, she focused on visitors and the legitimate concern expressed by some about committing to a congregation without a settled minister. This year, she is focusing on connecting with members who haven’t been as active in a while to learn more about their situation and facilitate increased participation.

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<sup>13</sup> Rev. Freidman keeps notes on who attends the church’s Pathway to Membership classes and reviews them periodically. If someone’s attendance seems to be falling off, she or others on the staff contact them to understand their situation and facilitate their reengagement with the congregation.



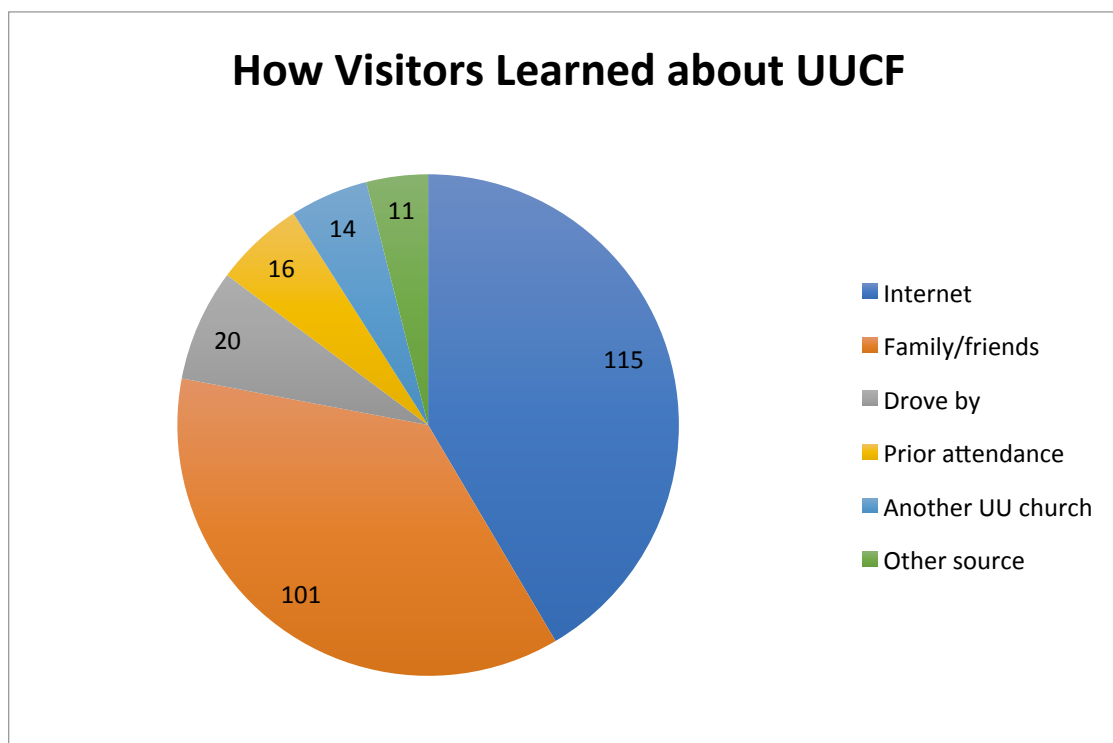
## 7. The Membership Continuum at UUCF

### *Typical Visitor-to-Member Trajectory*



UUCF's visitor-to-member process functions smoothly and effectively, according to the ministers, immediate past and present Lay Ministers for Membership and Outreach, immediate past and present chairs of the Membership Committee, and Committee members. They credit the dedicated and conscientious service of Carol Jensen, the current Member Services Coordinator, for the robust and virtually seamless process. She stays in touch with newcomers at several points throughout the process. As one new member said, she is "open and welcoming, but not pushy--she's got the balance right."

**Outreach.** According to visitor information cards, most visitors learn about UUCF through the Internet or from family/friends. The chart below shows the distribution of visitors, since January 2015, by how they learned about UUCF.



In addition to the UUCF website, the congregation has an active presence on Facebook, Twitter, Instagram, Google+, and YouTube. From the available data, it is impossible to say whether visitors who endorsed "Internet" learned about UUCF via our website or via social media.

UUCF also engages in other forms of outreach. The immediate past Lay Minister for Membership and Outreach, along with two other members, wrote press releases for the Vienna Connection and Fairfax Times newspapers and the online Reston Patch. He highlighted events such as the Oberlin concerts; Science, Reason and Religion programs; the Reverse Town Hall to End Gun Violence; and the community healing service after the 2016 election. The past Lay Minister also set up UUCF booths at Viva Vienna and the Fairfax festival. He reported that there is a lot of traffic at such events, but he's happy if we get even one new member.

**Welcome.** When visitors arrive at UUCF for the first time for a Sunday service, they go to the Welcome Table, staffed by two welcomers who have been trained by the Membership Committee. Visitors are invited to fill out an information card giving their name, contact information, areas on which they would like additional information, and how they learned about UUCF. They receive a temporary nametag and a welcome packet with information about Unitarian Universalism and UUCF. Visitors are invited to use a green mug during coffee hour after the service. The welcomers direct visitors with children to the Program Building, where RE has its own welcoming component. Several interviewees bemoaned the fact that there are few younger adults staffing the Welcome Table; whereas, many visitors are young couples or families.

According to the immediate past chair of the Membership Committee, research shows that, if members spend time with visitors after services, the likelihood of return goes up. At UUCF, an occasional welcomer roves the Commons during coffee hour to be sure no one with a green mug is left alone, but this practice has not been institutionalized. The Membership Committee has discussed the possibility of extending welcomers' responsibilities to include talking to visitors during coffee hour while being aware that some visitors do not want to be seen. However, as the chair of the Membership Committee said, the entire congregation needs to be involved in engaging visitors during coffee hour—just going up to people who are new and talking to them.

Because the Member Services Coordinator is responsible for office coverage once every three weeks, her availability to greet visitors in the sanctuary building is limited. When she is present, she is very proactive in greeting newcomers.

During the week following their first visit, visitors receive a welcome letter from the Senior Minister, an email from the Member Services Coordinator, and an email or phone call from the welcomer who greeted them at the Sunday service.<sup>14</sup> The Member Services Coordinator makes each visitor a permanent nametag, with a yellow stripe on the right edge indicating newcomer status, to be picked up at the Welcome Table when they visit again. Visitors are added to the distribution for the weekly email newsletter.

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<sup>14</sup> The Member Services Coordinator sends visitors' names, email addresses, and phone numbers to the welcomers, with the suggestion that they get in touch with the visitors during the week. It is up to the individual welcomers to do so or not.

Several years ago, the Membership Committee initiated a Guides program, in which they attempted to match visitors and members with similar demographics. The effort was very time-consuming and only marginally successful because of the difficulty of finding good matches. For example, many of the visitors were young people with children; whereas, the member volunteers were generally older. The program has been abandoned.

UUCF has experienced limited success in attracting members of racial/ethnic minority groups to visit or become members. The current Lay Minister for Membership and Outreach is looking into inter-cultural competency training with the aim of building a culture of belonging within the community and enhancing diversity.

**Visitor reception.** Visitor receptions are held once a month after each service. They provide an opportunity for visitors to interact with members of the Membership Committee, congregational leaders and, if they are available, the ministers.

**Newcomers Orientation.** Held four or five times per year, generally on Saturdays, Newcomers Orientations are intended for people who wish to explore whether UUCF is the right place for them and to learn more about the work of the congregation and how to get involved. Participants have an opportunity to talk about their faith journey and to interact among themselves. The Member Services Coordinator, two members of the Membership Committee, and one of the ministers attend the three-hour sessions. A light lunch follows. Participants are asked to fill out a volunteer survey that asks in what groups and committees they might be interested, how they might want to volunteer, and in what areas they have particular talent and/or experience.

**Membership Class.** Membership Classes, held every other month, are minister-led sessions for newcomers who are ready to make a commitment of membership to UUCF. Participants are asked to fill out the volunteer survey. They learn ways to become involved in the congregation and receive information about pledging. At the end of the session, they sign the membership book. The Member Services Coordinator subsequently gets in touch with committee chairs and group leaders to let them know of anyone who professed interest in their area. Semi-annually, in April and October, new members are formally recognized at Sunday morning services.

**Anniversary dinners.** The Membership Committee, with the assistance of the Member Services Coordinator, hosts an annual Anniversary Dinner. Members with tenure in five-year increments, along with new members, are invited; thus, each member is invited once every five years. These events celebrate recent and long-term members and encourage interaction among them.

### ***Membership to Leadership***

Although there is widespread praise for the visitor-to-member process, many interviewees questioned whether UUCF's mechanisms for helping new and existing members integrate into

the congregation are sufficient. Concerns are particularly acute regarding the preparation and selection of members to assume leadership roles.

**Integration.** While the progression of visitor to member is a fairly straight forward step-by-step process, there is no formal mechanism for assisting new or established members to become more fully integrated into the life of the congregation. Participation in small groups is encouraged as a way to connect with members beyond the Sunday worship services, but there is no prescribed route for better integration into the congregation.

**Leadership development.** One of the ways in which the shortfall in integrating members into the congregation manifests itself is in the selection of people for leadership positions. For Board, Endowment Committee, and Nominating Committee positions, the Nominating Committee solicits names of potential candidates from current leadership and staff and self-nomination. While the process has resulted in strong candidates for each of the last two years, it can be challenge to find willing and qualified candidates. For some roles in 2016, the Nominating Committee had only enough candidates to fill the slate and no more. Although the candidates were all qualified, there was no leeway to balance background, gender, sexual identity/orientation, race/ethnicity, or age to promote more diverse leadership.

The Leadership Development Team (LDT) was recently formed to address the problem. The LDT brings together existing groups--Lay Ministers Council, Denominational Connections Committee, Nominating Committee, Membership Committee, Adult Programs, and the Board. These groups keep a look out for potential leaders and refer them to the Nominating Committee and/or LDT. The aim is to institute a process that moves likely candidates into leadership positions or training and developmental opportunities for such positions. The hope is that greater engagement by the LDT will result in more congregants who view themselves as leaders and feel ready for and enthusiastic about taking on leadership roles. The LDT has to date identified leadership candidates along the entire age spectrum from teens to octogenarians. The LDT has published the "UUCF Leaders Guide," which gives a general overview of information for UUCF members serving the congregation in leadership roles.<sup>15</sup>

**Nominations and Appointments.** The Nominating Committee presents a slate of nominations to serve on the Board, the Nominating Committee and the Endowment Committee. In addition to these roles, the Board and Coordinating Team (CT) are charged with or asked to assist with finding leaders to fill positions on other important committees such as the Generosity Team, Annual Giving Campaign, Innovation Fund, Auction Chair and Lay Ministers Council. While UUCF is fortunate to have a committed and involved core group of members, the CT often finds itself in a position where, to fill various roles, it is repeatedly tapping the same people and there is no organized or intentional way for new names to emerge.

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<sup>15</sup> [https://uucf.org/wp-content/uploads/2016/10/UUCF-Leaders-Guide-Final\\_101216.pdf](https://uucf.org/wp-content/uploads/2016/10/UUCF-Leaders-Guide-Final_101216.pdf)

## Appendix A: Method

Research for the current evaluation of the membership function at UUCF included five major components.

### UUCF Staff Interviews

Rev. David Miller, Senior Minister  
 Rev. Laura Horton-Ludwig, Associate Minister  
 Rich Sider, Director of Administration  
 Carol Jensen, Member Services Coordinator  
 Mary Lareau, Communications Director  
 Mary Foster, Administrative Coordinator

### UUCF Lay Leader and New Member Interviews

Arlene Wilder, Membership Committee Co-Chair  
 Mary Jo Smrekar, Membership Committee Co-Chair  
 Marlo Nash, Lay Minister for Membership and Outreach  
 Jon Kun, immediate past Lay Minister for Membership and Outreach  
 Craig Bennett, Chair of the Leadership Development Council  
 Four new members of UUCF

### UUCF Membership Committee Focus Group

Barb Dutchak	Arlene Wilder
Gladys Henrickson	Rich Williams
John Kun	Sophie Zager
Bill Repsher	

### Document Review

Membership Committee Charter  
 Lay Ministers Council Charter  
 Member Services Coordinator Job Description  
 Associate Minister Job Description  
 Director of Administration Job Description  
 Administrative Assistant Job Description  
 Volunteer Coordinator Job Description  
 Staffing Report, May 2016  
 Numerous articles about membership at UUA.org, UUAMP.org and other sites

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**Interviews Conducted with Membership Staff at Other UU Institutions**

Sarah Masters, Director of Congregational Life, UUCA

Sherry Blanchette, Director of Membership and Outreach, River Road UUC

Rev. Michelle Collins, Interim Associate Minister, Cedar Lane UUC

Jennifer Daelyn, Connections Coordinator, First UUC of San Diego, CA

Corie Jason, President, UUAMP and Connections Coordinator, UU Church of Greater  
Lansing, MI

Annie Hedberg, Membership Coordinator, Jefferson Unitarian, Golden, CO

Rev. Lisa Friedman, Minister of Congregational and Community Engagement, Unity Church –  
Unitarian, St. Paul, MN

Marie Luna, Vice President, UUAMP, and Congregational Life Coordinator, Fox Valley UU  
Fellowship, Appleton, WI

Tina Lewis, Treasurer, UUAMP, and Membership Director, Unity Temple, Oak Park, IL

Lori Emison Clair, membership consultant and former Director of Congregational Life, First  
UU Church of Des Moines, IA

Carey McDonald, Outreach Director, UUA

The PEC appreciates the support, thoughtful insights, and participation of these individuals.



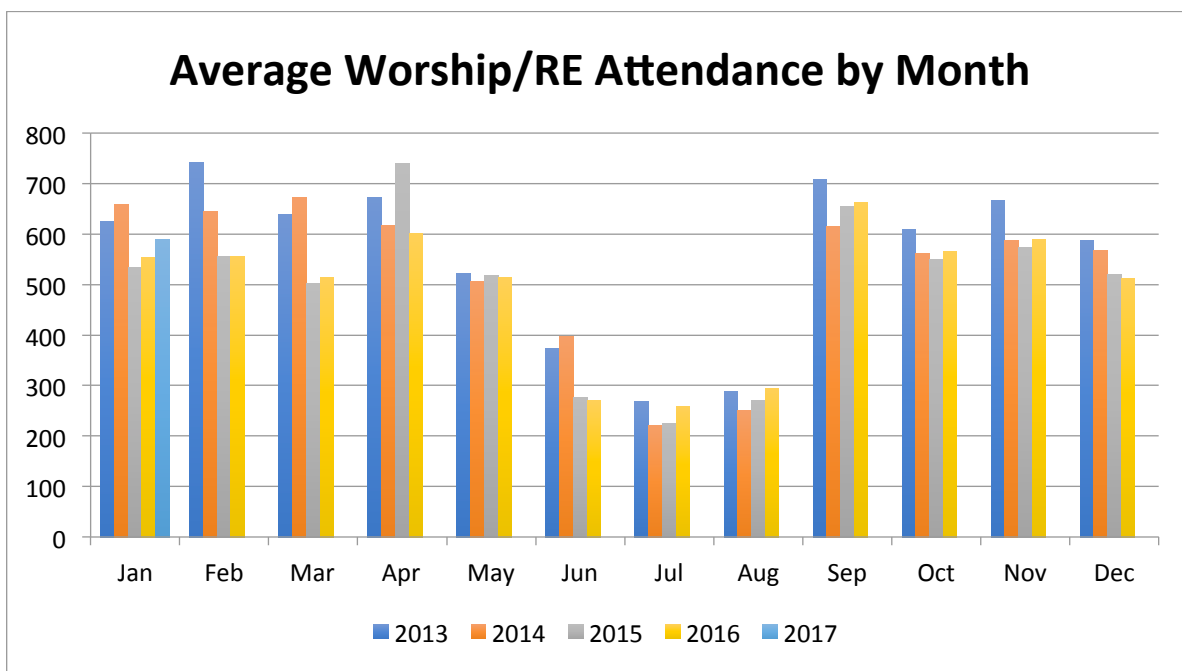
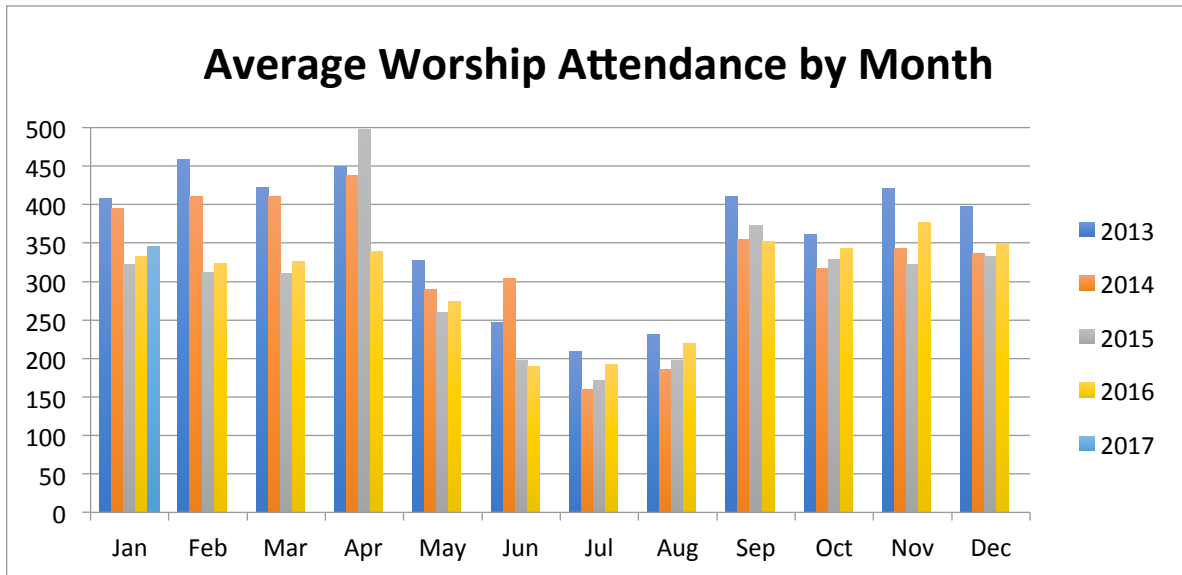
## Appendix B

### Organization of Membership Volunteers at other UU Congregations

Congregation	Size <sup>1</sup>	Key Volunteer Membership Groups
UU Congregation of Arlington, VA	839	Two informal groups in lieu of a formal membership committee: (1) Sunday AM Ambassadors - volunteers who serve as greeters, ushers, staff the Welcome Desk for newcomers, set up and clean up the coffee service before and after Sunday services; (2) Connectors - volunteers in charge of new UU member classes, a once-a-month happy hour to welcome visitors, and follow-up calls with new people
River Road UUC, Bethesda, MD	561	Two volunteer groups in lieu of a formal membership committee: (1) Welcome Team - led by 2-3 core members and augmented by a larger pool of volunteers who staff the Welcome Desk on Sundays, greet newcomers, serve as ushers, send follow-up post cards to visitors, and other related duties; (2) Connectors - led by 2-3 core members who assist the Director for Membership and Outreach in making connections between visitors and members, and assisting in specific member-related projects.
Cedar Lane UU Church, Kensington, MD	735	Four volunteer teams involved in membership-related efforts: (1) Ministry Membership Team - 5-6 volunteers involved in both membership strategy/planning work, as well as conducting new member orientations or related programming; (2) volunteer team for coffee setup; (3) volunteer team for Sunday service ushers; (4) volunteer team for the visitor Welcome Center in the Sanctuary. Also, one Board of Directors-led Growth and Development Task Force, creating an updated Growth Plan with related membership goals.
First UU Church of San Diego, CA	660	Connections Committee: led by two lay volunteers with eight other people, who coordinate other volunteers to staff a Welcome Table in the Sanctuary, attend volunteer fairs, run the monthly new member orientations, and carry out follow-up visitors.
Jefferson Unitarian Church, Golden, CO	825	Membership Team: 10 volunteers who are in charge of brunch during Path to Membership classes, planning the two New Member Welcoming Services annually; following up with new visitors; and other membership-related activities (a team of volunteer Greeters, organized by the congregation's full-time Volunteer Coordinator, staff a sanctuary Welcome Table and help to make connections between visitors and existing members or congregational groups.
Unity Church - Unitarian, St. Paul, MN	900	No formal membership committee or lay leaders/volunteers focused exclusively on membership activities. A part-time Volunteer Coordinator assists with organizing a larger pool of volunteers for membership-related activities, such as staffing a Welcoming Table in the sanctuary, coordinating ushers for services, and preparing food for new member events.
Unity Temple, Oak Park, IL	587	Membership Committee: a 9-person volunteer group assisting in greeting visitors, following-up with them, and assisting in new member programming. Approximately 5 other volunteers assist with visitor welcoming activities. For 2017, Unity plans to train several volunteer "floaters" to socialize with visitors during coffee hour after Sunday services, offer a Newcomer Welcome after every service, and offer an Invitation to Faith in Action monthly to help new people assimilate into the church.
Fox Valley UU Fellowship, Appleton, WI	704	Membership Committee: a 5 person, task-oriented volunteer group which assists in greeting visitors, conducting following-up, and assisting in new member programming. Fox Valley plans to add a new Engagement Group, to help connect visitors to others in the congregation, in 2017.

<sup>1</sup>Figures provided by congregations are approximate & do not include pledging Friends

## Appendix C



March and April attendance vary based on the timing of Easter. June 2014 levels were abnormally high due to MKM's departure celebration. Streaming numbers were added to worship totals beginning July 2016.

In general, worship attendance during the new settled ministry has been at or slightly above the attendance during the interim year; but, in almost all cases, it is significantly lower than during the previous settled ministry. Noticeable in the worship numbers (but not when combined with RE) is a post-election 2016 bump.

## Appendix D

Following is the covenant, or agreement, that new members sign when they become members of the First Unitarian Universalist Church of San Diego, CA.

### **BOND OF UNION**

This church is an intentionally diverse democratic religious association, dedicated to building a dynamic faith and attitude wherein our religious heritage finds ennobling harmony with contemporary truth as validated by reason and experience. We seek the spiritual enrichment of our members in a mutually sustaining fellowship, and the welfare of all people.

To these ends we foster free inquiry with the right to make up one's own mind on religious beliefs; respect for the individual with a willingness to listen to each other's opinions and viewpoints; and consideration and respect for minority positions while practicing the democratic process in human relations.

We recognize our responsibilities as a Church to help our members fulfill in their lives their religious faith and personal ethic and to develop a sustaining confidence in the meaning and purpose of life. We recognize love as a creative and supportive force in life, and we realize the interdependence and unity of all life. We seek cooperation with other organizations having similar aspirations.

***In the spirit of the above Bond of Union, I freely choose to become  
a member of the First Unitarian Universalist Church of San Diego, CA.***