

Ad Hoc Team Report to the Congregation

June 10, 2018

The Ad Hoc Membership Team was the brainchild of some active church members who made a recommendation to the Operations Team that such an endeavor be embarked upon. A team was formed, and the work of the team was influenced by the UUCS Strategic Plan.

The members of the team were Steve Becker, Erin Fitzgerald, Betsy Lawrence, Cindy Phillips, Michele Vazquez, and Elizabeth Wilhelm. Our liaisons were Aria Curtis, Director of Children and Family Ministry; Diane Critchlow, Membership Coordinator; Pat Warpenburg and Johnna Woodruff from the Path to Membership Team; and Jerry White from the Board of Trustees.

The Ad Hoc Membership team is a group with diverse church experience whose mission is to aid the congregation in creating a road map for full incorporation and inclusion into the life of the church for everyone from curious individual to church elder.

We met monthly from September 2017 – June 2018 to discuss what our congregation was already doing in regard to our Membership Ministry, to educate ourselves about the possibilities, to research other UU congregations' best practices, to report our findings to the congregation, and to prepare the way for a new team to take on the task of implementation of a comprehensive Engagement Ministry.

We moved from the concept of a Membership Journey to one of an Engagement Journey. This allows us to take into account all of the congregants, whether they decided to officially join our congregation or not. We did not want to focus solely on the experience of membership, although we recognize it is an important part of the process for many in our congregation. This lens gave us the flexibility to look at what we consider to be the full spectrum of engagement within our congregation and is an ongoing trend that we saw within many UU congregations.

The Engagement Journey as we defined it includes the following groups: **Curious Individuals** are people who has not yet attended Sunday morning worship, but may have attended a community event at the church or learned about us from the internet. **Visitors** are those who have attended a Sunday service. **Newcomers** are people who is have attended a few times on Sunday morning and may have attended other events. **Engaged Individuals** may have decided to join the church, attend regularly at worship and other events, and may volunteer on a team or in our Religious Education program. **Integrated Leaders** have taken on leadership roles and serve as team leads or on the Board of Trustees. **Church Elders** have participated in all of the parts of the spectrum and are now is taking a step back from responsibilities; they may not be able to get to the church on Sunday morning, but are part of our community.

We discovered that these stages are not meant to be read as a linear path individuals move through, but rather as snapshots describing different ways people might be engaged. They might move from one step to the next, be happy to stay in one category, move back and forth

through a few stages, or perhaps skip around; however, we realized each category has its own needs and must be paid attention to.

We decided to look at a number of resources including information from the UUA, UU Regions and Districts, other UU congregations, and the Professional Organization for UU Membership Professionals. We also asked those within our congregation who are already working in Membership and the Staff what they thought was working, what could be improved upon and what their dreams for our congregation's Engagement/Membership Ministry were.

We asked all the congregations that had over five hundred members a series of questions. There were thirty six congregations that met that criteria, and sixteen of them participated in our survey either in a phone interview or through email responses. As far as we know, we are only one of two congregations that have engaged in research of this magnitude, and the congregations that we spoke to were excited to take part in our research as we promised to share our findings with them. We compiled their responses along with information we gathered from within the congregation and from other UU resources into our report.

Some of the general recommendations are:

- UUCS should intentionally consider the differences between "Membership" and "Engagement".
- UUCS should recognize the important role of Children and Family Ministry in the engagement process, and collaborate accordingly.
- UUCS should seek to offer programming that is crafted with each individual stage of the engagement journey in mind.
- UUCS should recognize that engagement is an aspect of the culture of the church, rather than just the task of a team or set of teams.
- UUCS should more actively leverage the capabilities of Breeze with regard to engagement information.
- UUCS should have a paid employee (20 hours per week or more) with well-defined job responsibilities to coordinate engagement efforts and associated administrative tasks (All the congregations that we interviewed had paid staff coordinating their Engagement Ministries)

Overarching Themes

Throughout the process of researching membership practices at large UU congregations, there were a number of themes that came up consistently. These themes appear to be common to smaller congregations as well, including the Spokane UU Church, and have implications for every stage of engagement.

Membership versus Engagement

Growth in a church has been historically tracked by number of certified official members. At every level of the denomination, including the UUA, a shift is occurring away from monitoring health and growth through membership rolls and Sunday attendance totals. Rather, the level of engagement of an individual through attendance and participation in small groups, educational

programs, social justice work, social gatherings and worship is trending as a marker of commitment. Engagement off-site or through virtual gatherings is also gaining popularity.

Professional Membership Staffing

Each of the 37 large congregations (more than 500 members) have paid professional staffing charged with some aspect of the engagement journey. Most positions were part-time, ranging from 20 to 30 hours, but several had full-time professional staffing to coordinate engagement efforts. The portfolio of these staff differed from church to church, reflecting the specific goals of each congregation.

Culture of Authentic Engagement

Authenticity is key. People engage more, and more fully, when they are met with genuine welcome and acceptance by many individuals, not only the group tasked specifically with welcoming. There needs to be room for a diverse set of individuals in their joys and hope, as well as in their disappointment and fear. Additionally, effective outreach may look different for different groups, and should reflect the UU values of diversity, equity and inclusion. As much as newcomers are looking for opportunities for personal growth and outreach to the wider community, they are also reading the culture of the church to see if they fit in.

Intentional Planning for Growth

Structures for engagement must be built proactively so that the church can grow into them, rather than observing growth and then scrambling to accommodate. Challenges around lack of physical space, seating or systems should be acknowledged openly and honestly to both newcomers and old timers alike.

Holistic Approach to the Engagement Spectrum

Collaboration between groups and teams involved in engagement is vital. Rather than operating in individual silos, the various drivers of congregational engagement– religious education, worship, hospitality, programming, Paths to Membership – should work together to create a dynamic engagement spectrum.

Balanced, Mission-driven Programming

Everything the church does should reflect the mission of the church. All groups, events, programs, classes must be clearly tied to the religious values of the church. In addition to community-building events and social justice work, an individual's spiritual growth must be satisfied. A balanced approach is vital.

Engagement Stages

Findings and recommendations for each engagement stage on the spectrum are as follows:

Curious Individual

This individual has looked into Unitarian Universalism and may have attended a non-worship event.

Findings

These individuals are curious about UU beliefs and values. They may have heard about the denomination from family or friends, attended an event or program held at the church, or have seen/participated in community activities related to UU, including social justice actions. Most have investigated the church's website, many follow UUs on social media, share UU content, and read UU books.

Recommendations

- Review website to make user-friendly from perspective of curious individual
- Optimize all virtual access points (social media, Yelp/Google/search functions) for effective outreach
- Continue updating and improving services online via streaming and the archive
- Develop and strategically display materials about the denomination and UUCS
- Train and provide UUCS greeters at all large events held at the church (community events, concerts, conferences, etc.)
- Train and utilize Building Facilitators as intentional ambassadors for the UUCS
- Develop outreach plan/team to provide UUCS visibility at community events, social justice work, etc.

Visitor

These individuals are newly attending on Sunday mornings.

Findings

Visitors are involved with UU programs, classes or groups at a basic, fluid level. They may or may not identify as UUs. These folks may attend events hosted by the congregation, occasionally go to Sunday services, and/or participate in programs such as the Buddhist group, OWL classes, the Women's Retreat. Sometimes they have a friend or family member who is a UU in Spokane or elsewhere.

Recommendations

- Use and/or update "pew cards"
- Regularly update the welcome packet
- Offer welcome information in more than one physical location in the church building
- Offer welcome information online
- Offer obvious ways for visitors to engage for a one-time event
- Ensure multiple entry points for visitors to enter into the church community that don't center around Sunday morning (workshops, coffees, lunches, trainings, retreats, classes, work parties)
- Publicize events and opportunities for engagement with visitors in mind, i.e. online and Sunday Morning "Fresh Sheet"
- Coordinate efforts of all Sunday morning teams (Greeters, Q&A, Ushers, RE, Worship, etc.)
- Streamline process for collecting, recording and appropriately using visitor information
- Use Breeze software to its fullest capacities, including tags that reflect level of engagement
- Formalize procedures for reaching out to visitors on a specific schedule
- Continue offering UU 101 classes in current format

Newcomer

Visitors who move into regularly attending church on Sundays, and are starting to see the congregation as their church

Findings

Newcomers are individuals in transition from visitor to member or connected friend. After attending services several times, they may engage in a one-time or low-commitment activity outside of services. They have started to meet people and to start building relationships. These folks may have attended UU101 or begun asking about the process to become a member.

Recommendations

- Continue offering Paths to Membership with current format
- Coordinate efforts of teams working with visitors and newcomers
- Coordinate and streamline the processes of Paths to Membership Team and Generosity team
- Formalize the process for checking on entries into membership book
- Explore a self-guided Path to Membership
- Create and formalize a mentoring program for 6-12 months for new members
- Offer covenant group specifically for new members as they complete Paths to Membership

Engaged Individual

Individuals engaged beyond Sunday worship, and who are participate in programming

Findings

When a person gets involved in a regular activity, such as an affinity group, small group ministry, teaching courses or classes, serving on a team, they have engaged with the community. All of these programs require ownership in one way or another, and expectations of regular participation and, in many cases, opportunities to share spiritual journeys with each other. These individuals donate time, talent and treasure, either as “official” members or as friends of the church.

Recommendations

- Prioritize the goal of living out our church’s values through all programming
- Continue offering, and consider expanding the service, social justice and volunteer opportunities, including one-time volunteer opportunities in various areas of the church
- Increase visibility of opportunities for engagement through Sunday tabling and various communication formats
- Develop Pathway to Renewal program
- Develop Chalice Conversations program

Integrated Leader

Engaged individuals emerging as team leaders, program planners, RE facilitators, etc.

Findings

More than simply engaged individuals, some members emerge as leaders. When someone steps into the role of a leader they become fully integrated into the church community, putting their own twist on the programs and teams they lead.

Recommendations

- Create process for individuals to self-identify as leaders
- Focus on intentionally identifying, recruiting, training, recognizing and rewarding leaders at UUCS
- Develop system to identify and address burnout/sustainability issues among leaders
- Recognize lay individuals as religious leaders
- Form ongoing Leadership Development Team to coordinate above efforts

Church Elder

Individuals with a depth of experience in the church who have been engaged in the past but who have become less engaged over time.

Findings

Many active individuals, both members and friends, change the direction and intensity of engagement as they age. In many cases, these are historically active members who, due to retirement, health issues, family responsibilities, changes in financial circumstance, are unable to continue

Recommendations

- Develop programs and systems that allow Church Elders to engage in different ways
- Create ride-sharing program for Sunday services
- Host appreciation events honoring contributions of elders
- Create “Member Emeritus” category for older members for who financial contribution is difficult

This team was a pleasure to work with. This report and all aspects of our work together were a joint effort. The staff and other volunteers who contributed to our body of knowledge are excited about what we are already doing and even more excited about what the future may hold. We look forward to seeing what the newly formed Engagement Team will do with the research and recommendations that we have come up with. The future is looking bright.

In Faith,

Erin Fitzgerald, Betsy Lawrence, Cindy Phillips and Elizabeth Wilhelm