

1st UU Church of San Diego  
Growth Task Force  
January 4, 2010

Summary

A Growth Task Force (the "task force") convened over the summer and fall to study how well the church is meeting the needs of our members and what may be limiting our overall growth in membership. We believe we identified some of the key factors limiting our growth. This report summarizes our findings and presents specific recommendations. We urge the Board to oversee the recommendations and ensure they are implemented, if feasible, by the end of the current church year.

Introduction

The Unitarian Universalist faith, like many others, is not currently growing in size. Our own church, while still attracting a steady number of new members, has been slowly losing membership as more people are leaving than joining. This is a problem which is not unique to our faith but is of direct concern to us because it means fewer members to carry out the mission of our church and less financial resource for the programs we wish to provide. While precise numbers of members is difficult to report due to varying definitions of membership through the years, we do know that the number of pledge units has decreased from a high of 755 in 1997 to 471 as of the end of 2010 fiscal year.

Objectives

The task force was convened to consider the growth of our church community, specifically how growth could be achieved and attrition reduced.

The Process

The task force came together in June 2010 and convened for a total of eight meetings through December 2010. An initial brainstorming session and prioritization of topics was followed by fact finding and reading of various contemporary and historical documents written by committees, and consultants that evaluated various aspects of our church membership. The task force also interviewed selected members and staff.

Given the critical nature of the membership process to growth, Suzette Southfox, Director of Membership and Development, and Susan Harding, lay chairperson of the Membership Committee, were each invited to participate in one (each) of our meetings. Their input was invaluable in providing detailed information on the current processes together with candid responses to what they see as the strengths and weaknesses in the various activities relating to visitors, membership, and new member integration.

The general themes the task force focused on were:

- Visitors and the entire membership process, with additional examination of the first year of membership
- Attrition
- Involvement and making connections for both new and established members
- Volunteering and leadership
- Our mission and how it relates to engagement in church life
- Worship and how it may affect membership and engagement

Specific recommendations of the task force relating to these general themes are summarized below, followed by a more detailed discussion of their insights and the findings upon which these recommendations were based. We understand that some of these recommendations are already being studied and implemented by church staff.

Overall, the task force came to the consensus that engagement is a key factor in ensuring all our members find a sense of belonging and fulfillment within our church community. Ideally, we should all share a clear sense of the mission of both our church and the UU faith as a whole so that our programs and shared activities are closely linked to both. A sense of shared mission, both within our church and in relation to changing the world for the better, would result in a closer-knit church community where all feel a sense of belonging, purpose, and fulfillment. In achieving this, our church would project a clear mission and sense of purpose that would attract new members and retain those who already belong.

## Specific Recommendations

- Foster a clear sense of the mission of our church and our UU values. Simplify our church's mission statement. Focus our staff's and congregation's energies and activities to accomplish our endeavors with a shared sense of mission, within our church, and our larger communities.
- Make the membership process more meaningful by expecting people to learn more about the UU faith and First Church itself before they complete the membership process. Reinstate classes focused on developing membership, such as *Creating Sacred Ground* and *UU Membership 101*.
- Because Membership (including its various aspects of member retention) is crucial to the life and growth of our church, elevate it to Ministry Team status, thus enabling a more coordinated, focused, visible, and concerted approach to community life. This increased status and focus can both help in implementing the recommendations of this report, as well as better connect all members with the mission of this church, resulting in the growth we seek.
- Increase the expectation that all members will engage in a variety of aspects of church life by encouraging them to participate in Sunday worship, small groups, volunteering, and service projects outside of our church. Make such involvement easy to achieve and be specific about the extent of participation expected.
- Implement a program to assist new members to make connections and become fully engaged in church life. This might include being paired with existing members (e.g., establishing a buddy system) who can help them navigate the many options or having groups of new members join together as cohorts to socialize and perhaps perform a service project. We suggest creation of a team within Membership to make personal or phone contact (avoid email) with new members to assist them in getting connected with people and groups in the church.
- Increase the expectation that all church members will belong to a neighborhood group, spiritual friendship group, or other small, intentional group where intimate discussions will foster community. Provide new groups for additional members rather than expanding existing groups to ensure that nobody feels like an outsider. We observe that there is no current process for forming (or joining)

neighborhood groups, and we encourage identifying a small group tasked with expanding these groups.

- Establish clear expectations for when and how existing spiritual friendship groups will be phased out and re-formed to allow newcomers and more established members to interact more frequently and on an equal footing.
- Increase the variety of experience in worship services, for example in music and reinstating Credos, without presenting an overwhelming style change that might put too many people off. We believe this will lead to higher levels of participation and attendance.
- Undertake regular all-church service projects to foster a sense of community and joint effort. Make aspect of projects appropriate for the entire family to participate.
- Increase our sense of community by providing more opportunities for all-member "Fun" activities, such as ice cream socials, sing-alongs, etc.
- Support additional volunteer and lay leader recruitment by establishing a lay Volunteer Coordinator position.
- Provide clear job descriptions for all volunteer and staff positions and post on our website. Offer more leadership training to volunteer leaders. Publicize volunteer opportunities.
- Make use of E-Tapestry as a database to identify member interests, skills, involvement, etc., and have more lay volunteers and staff able to use aspects of the database to facilitate various aspects of involvement and making connections.

## Discussion of Findings

### (1) Visitors, Membership and New Members

The task force was of the unanimous opinion, after hearing from Suzette and Susan, that the visitor and membership processes they have developed are effective and working quite well. However, with more volunteer involvement and perhaps additional lay leadership, the attention given to new members, particularly during, and even more so

after, the first year of membership, could be enhanced to assist them in getting connected and staying involved in the church.

Several ideas for helping new members become engaged were put forward including a "buddy system" whereby new members are paired with longer-term members who can assist with introductions and joining groups. In addition, the task force supported the benefit of having each group of new members form an intentional cohort in the belief that this would enhance both social connections and involvement with the various Ministry Team activities. There was also strong support for forming new spiritual friendship groups for each cohort of 10 to 12 members for the same reasons as well as to ensure that spiritual growth is closely allied with church membership. Overall the task force felt that there should be a clear expectation that new, as well as existing, members engage as fully as possible with the life of the church and that this involvement would reduce attrition.

In addition to engagement, the relationship between feeling a strong link to our mission, both as UUs and as members of First Church, and to a vibrant membership was a theme the task force judged to be of great importance. We felt that, for new members particularly, the better they are able to connect with our core values as UUs, the more connected they may feel to our church and its mission. With this in mind, we agreed that attendance at UU 101 should be considered a prerequisite for membership and that including aspects of the membership process and membership ceremony itself which are unique to our congregation would foster a positive sense of community.

From an organizational perspective, the task force discussed where Membership (including the various aspects of member retention) should fall in the structure of our church. It was generally thought that this area is comparable in importance to many other aspects of church life which have attained Ministry Team status. Therefore we recommend that Membership in all its various aspects should also be elevated to this organizational level.

## (2) Attrition

As the corollary to growth, the task force looked at many aspects related to avoiding attrition such as increased involvement, identifying with our mission, and making worship "speak" to all members. The task force made efforts to understand the demographics of attrition, for example whether those who are leaving our church are new or more long-standing members. We also contacted members who had joined the church over the last

~3 years to assess their level of involvement and how the church was meeting their needs.

Overall the task force felt that every member of our church community should take responsibility for reaching out to new people to help them get connected and find what they are seeking. It is not just the responsibility of the ministers or Membership Committee to help members feel more a part of the church. By better meeting all its members' needs, the congregation could enhance growth and reduce attrition.

(3) New Member Survey

A survey group of 131 members who had a new member year of 2006 - 2009 was developed (using E-Tapestry) including a survey script (see Appendix A) used by members of the task force when contacting these members. Of the 131, some did not turn out to be viable candidates for the survey, quite a few had phone numbers that were not current, and many never answered their phone. Contact was made with approximately half of the 131 members and of these, 48 were deemed appropriate for collating results.

A summary of the results is shown below, with three groups of respondents corresponding to their stated commitment level and involvement with the church on the date of when they were contacted, as compared to the time they became members.

Commitment Level Today			Church Met Needs vs. Expectations			Activities - First 12 Months of Membership								Now
More	Same	Less	Better	Same	Not as well	Sunday Worship	SFG	Adult RF	Comm.	Sunday Vol	Other Group	>1 Non-Worship Activities	>4 New Friends	Pledges
22			13	5	2	19	7	13	8	6	17	16	17	18
	9		2	4	2	7	3	2	1	2	4	4	4	7
		17	7	7	3	15	3	8	3	3	10	8	10	5

For the "More" committed respondents, there is high correlation with their commitment and the number of "non-Sunday-worship" activities, making more than four new friends, and pledging. This group also had the highest percentage of committee (Comm.) involvement. Compared to this first group, the "Same" and "Less" committed respondents were almost equally attending on Sunday, had reasonably high percentages

of participation in other committees and in making new friends. Less than one in three of the "Less" committed members are currently pledging. However (not shown above), six of the respondents reported that they did not join any group, committee, attend an Adult RE class nor volunteer on Sunday. Of these six, five reported making no new friends. Four of the six do not currently pledge.

Additional information may be gleaned from reading the comments associated with the surveys. To date, the Membership Committee has not done this in any detail. It was noted that one theme is heard from visitors and newer members more than a few times: "The church does not make it easy to get involved and connected." We recall one scientific study that demonstrated when people are confronted with too many choices they choose none as compared to when they are offered a smaller number of choices. We wonder if this comment could be related to the fact that at our church there are seemingly an endless number of committees, groups, and other volunteer opportunities.

#### (4) Involvement and Making Connections

This became a resounding theme for the task force in the sense that many discussions often returned to engagement as the key to ensuring that our church community grows.

In recognizing that everyone needs to find ways to feel valued, useful, and involved within our church, the task force felt that we should find ways to increase the expectation that everyone become involved in church life in multiple ways. This would include worship, volunteering, and joining small groups, particularly those focused on spiritual growth and our core mission. The task force agreed that we should expect that all members (both old and new) should (1) participate a set amount of time in structured church activities to increase personal/spiritual growth or deepening and/or exploring their own paths, and (2) volunteer a specific amount of time regularly for service to the church. We also felt there would be great benefit in trying to involve all members in a sustained, all-church service project. This project should include aspects suitable for participation by all age groups and abilities.

For new members, we agreed with consultants who study church membership, that the risk of leaving is high unless members are able to make at least 3 new friends within 6 months of joining. Engagement and fellowship is therefore the key. However, we understood that fellowship may have different meanings to different people. Increasing the frequency of planned social gatherings and finding ways to make it easier to connect with existing groups and activities through the website or Volunteer

Coordinator [see below], were considered specific ways to help make involvement and social connections easier.

Connections to the activities of the various Ministry Teams should be enhanced so that it is easier for new members to become involved by knowing more about what each team is doing. For example, each Ministry Team should be responsible for reaching out, particularly to new members, to help them get involved. This process would be assisted if each Ministry Team had a designated recruiter and trainer. Likewise, we recommend that representatives of affinity groups actively make contact with new members to encourage involvement. More complete information relating to Teams and affinity groups on our church website would also be helpful.

The task force also felt that all church members should be strongly encouraged to join a small spiritual friendship group (or other similar small group) in which to explore life and living well, and conduct service projects in an atmosphere which encourages intimacy. We recognized that this would necessitate the formation of many more new groups to ensure that newcomers do not feel like outsiders as they inevitably would in joining a previously established group, however much they were welcomed. Overall, a clearer understanding of how and when existing groups are phased out and new groups formed would be beneficial. If spiritual friendship groups were regularly dissolved and re-formed, the resulting newly-formed groups would be heterogeneous with respect to the length of time its members have belonged to First Church, and this would foster community across our entire spectrum of membership.

And finally, we build our beloved community on solid bedrock of personal relationships between members of our congregation. Strong personal relationships in our church community minimize discord, help retain members, and enrich all our lives. In order to foster and maintain close personal relationships between all congregants, we recommend an increase in the number of recreational activities sponsored by the church. The relaxed atmosphere at ice cream socials, game nights, sing-a-longs, and other fun activities will encourage both new and seasoned members of our congregation to connect and re-connect with each other in ways vital to our continued growth.

#### (5) Volunteering and Leadership

In recommending a significant increase in the number of activities and groups within the church aimed at fostering community, the task force recognized that many more volunteers and lay leaders would need to be recruited and trained. In light of this, we

suggest establishing a new lay "Volunteer Coordinator" position. This person would communicate with existing groups in the church to be aware of their activities and needs, and then reach out to new and existing members to match them with appropriate groups. The task force further felt that clear job descriptions for both staff and volunteer positions should be written and made available to all in the church office and on the church website. This would enable members to see where help is needed and what each position would involve. Suzette has already developed several excellent draft job descriptions for volunteer positions that provide very specific details on scope, effort, and length of service requested. The task force believed that volunteering would increase if all Ministry Teams were requested to provide similar descriptions of their needs. Increased use of the church's E-Tapestry database might also enhance some organizational aspects of membership, volunteering and small groups.

#### (6) Mission

As noted above, the task force felt that we should all be able to clearly define and identify with our UU principles and our church's mission as well as to communicate how we change people's lives for the better both within and outside the church. These elements should be the foundation of what our church is primarily about and the church staff should prioritize their time in support of activities and groups that most directly relate to our core mission and values.

To assist in this, it was unanimously felt that the church needs a more succinct mission statement that everyone can easily express and relate to. The group felt that our current mission statement is unwieldy and ineffective and should be replaced with something more concise. This revision process should include congregational "buy-in" but need not be a drawn out, lengthy process.

In the task force's opinion, increasing the engagement of all members of our church community in activities and service projects which directly relate to our church mission and values would provide a sense of joint mission and community which would result in growth by both attracting new members and reducing attrition.

**The importance of a clear mission cannot be understated - we recognize that it is key to both growth and financial support - if a church is underfunded, it is most likely not making the case for its vision or mission clear enough.**

## (7) Worship

On a more specific note the task force considered the importance of the worship service in attracting new members and retaining established ones. It was recognized that we need to be mindful of differing motivations in coming to church and that there are aspects to the service which are more or less appealing to all, but that these are not universal. Ensuring variety in worship was therefore emphasized and there was broad support for reintroducing specific aspects such as Credos which foster a sense of sharing and community.

Overall an increase in the variety of musical experience was supported, keeping in mind that there may be strong positive and negative associations with different musical styles, particularly contemporary vs. classical. Offering different musical styles and experiences at the two Sunday services may be one way to appeal to a wider variety of people in terms of musical taste.

### Task Force Members:

Dave Hunt (Chair)

Bart Baenish

Jan Gallo

Kathleen Garcia-Horlor

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**Contacting Members Who Recently Joined First Church  
Phone Script  
Growth Task Force  
October 9, 2010**

**Purpose**

The objective of this survey is to learn why “new” members have stayed involved with First Church or why they did not stay involved. “New” is defined as those individuals who became members in 2006 – 2009. The Growth Task Force will attempt to contact individuals who we believe stayed involved and others who we believe did not and attempt to discover any patterns or trends that contributed to the decision to stay or not stay involved.

**Opening Script**

Hi, is this \_\_\_\_\_ ? Or, May I speak to \_\_\_\_\_ ? Thanks, my name is \_\_\_\_\_ and I am a member of a special group at First UU Church that is contacting members who joined the church in the past few years to understand how well the church is serving their needs. We want to learn both what is working and where we can improve. We thought that talking with newer members would be valuable. If this is a good time, would you be willing to take about 5 to 10 minutes to answer several questions about your experiences as a new member?

*No, not a good time...*

No problem, I'd be happy to contact you again at a more convenient time and I appreciate your willingness to help the church. When would be a better time?

*Unwilling to talk or help...*

I'm sorry if I called at a bad time. Is there anything you would like me to pass on to Arvid, Kathleen or the President of the Church, Everett Howe?

*Willing to talk now... proceed to next section*

## Questions

Thanks, \_\_\_\_\_. I appreciate you being helpful. *Optional addition:* and I promise I won't take much of your time. Our task force has been examining the membership process at First Church and other areas that are related to meeting the needs of our members. *Pause for any reaction*

My records show that you joined First Church in 20xx, is that correct? *If not, apologize for the error but say, No problem. I'll tell the office to make the correction. And in what year did you first start coming to First Church?*

OK thanks.

So, here is my first question. 1. As you reflect on your level of involvement with, and commitment to First Church TODAY, as compared to when you became a member in 20xx, would you consider yourself:

- more involved and more committed;
- less involved and less committed;
- or about the same level as when you became a member?

2. We know people come to our church for a wide variety of reasons, such as connections with others, spiritual growth, social justice causes, and religious education for themselves or their children, just to name a few. Could you tell me about your reasons? *Pause to see if they wish to share. If they do, acknowledge and thank them; comment as you think appropriate.*

Here is the next question. 3. With respect to the reasons you decided to join First Church, how well did the church provide what you may have been seeking:

- better than you expected;
- not as well you expected;
- or, about what you expected?

Do you want to comment further about that?

Thanks, we're already half done with my formal questions.

4. Thinking back to the first 12 months after you became a member, did you:

- Attend Sunday Services more often than not?
- Join a spiritual friendship group?
- Take an Adult Religious Education Class?
- Join a committee?
- Work as an usher, greeter, hospitality, server of coffee/food or other volunteering on Sundays?
- Become part of any other group that met regularly?

Thanks. I have one more specific question and then a final open ended question.

5. From the time you first attended First Church through the first 12 months after you became a member, how many new friends did you make at First Church?

Can you say how many of those were before you joined or instead how many were during the membership process and the 12 months thereafter?

Thanks, \_\_\_\_\_. Those are my only formal questions but I would like to invite you to respond to one more open-ended question. *Pause to make sure that is OK.*

6. You said previously that your level of involvement with and commitment to First Church is now <greater than> <less than > <about the same as> when you became a member. What do you think are the reasons that that is the case?

\_\_\_\_\_, thank you again for your time. This is very helpful and I have enjoyed talking with you. *As appropriate, you may wish to suggest meeting at church on one of the next Sunday's to get to know them better.* If you have any other comments you would like me to pass on to Arvid, Kathleen, or the President of the Church, Everett Howe, I'd be happy to do so.