

## Minister's Report to the Board

April 2015

Congratulations on the wonderful news about your candidate! The whole process, from the way the MSC was chosen to the way you all modeled non-anxious patience paves the way for a successful candidating week and vote.

And as I predicted in a recent sermon, I have become a lame duck. It is time for me to start getting out of the way! The Transition Team and I met for the last time recently, and concluded that it will not be possible to complete the Congregational Covenant. We got very few responses to the request for 'promises you need and promises you will make'. Some of them were not really promises, some were too broad, and some treated the form more as a complaint or suggestion form than the beginning of a covenant. This work will need to wait until people can be better educated as to the true meaning of a covenantal (as opposed to creedal) religious community.

I will wrap things up here by the end of June, and will take all of July as my remaining vacation time. Since I will be moving during the month of July I will be arranging for other ministers to take emergency call until the new minister arrives in August. I will let you know when the call schedule is completed.

In June I will complete final performance evaluations for all my direct reports, and will make sure that they are completed for everybody else as well.

We are making progress on the buildings and grounds staffing situation. We have decided that having one full time generalist is not the best way to get things taken care of. We have contracted with a professional cleaning company to do the regular cleaning each week and bigger jobs as needed. We are also planning to contract with a landscaping company to do the general moving, leaf blowing, etc. Our part-time Sexton, Jeram, currently works on Sundays and Thursdays. We will use him for the heavy-lifting set up jobs. And, we are in the process of hiring a ¼ time Maintenance Technician who will oversee the contractors, take care of repairs and maintenance, and collaborate with the Director of Operations and Buildings and Grounds committee appropriately. We hope to have this person in place in the next couple of weeks.

I have submitted several items separately for your perusal:

- Charters for the Communications and Safer Congregations Committees. I suggest you look them over, send me questions or comments, and then put this on the May agenda for final approval.
- A Disruptive Persons Policy. This is standard UUA language; you will find variations in the policy manuals of most congregations that have policy manuals. Debra Haffner thought you had passed this policy years ago but I was unable to locate it among the existing policies that Ted pulled together. So I submit it for your formal consideration. Again, look it over, send me questions and comments, and expect to have it on the May agenda for final approval.

You asked last month for the staff to examine RE attendance trends. I met with Mary Collins and the RE Council leadership and they have come up with a plan. After the meeting they sent me this.

RE Plan for Addressing Board Concerns about attendance:

Immediately:

- Felicia Keeton will contact Anne Khanna - to review the numbers / trends and report back to Mary
- Mary will put together a summary of February programming and contributing factors and send to the rest of the Council for feedback or anything they might contribute

April 7th Elementary & Youth Circle chairs Meeting

- Discuss ways to survey parents (call, email, Survey Monkey) reasons why they have missed RE with info back by May 3rd

May 18th Board meeting - report to Roberta for this meeting.

Looking ahead to June: I will be away the third week in June attending my niece's high school graduation. I made this commitment long ago, when the Board meetings were still on second Mondays. I will leave it up to you to decide what you want to do about the fact that I must miss the June Board meeting. AND, you will, for one final time, have to complete the Assessment of the Interim Ministry Program and submit it to the Transitions Office at the UUA. This is the final evaluation. Michelle will be in touch about the process.

You had asked me to report each month on one of the ministry areas for which I am responsible. This month it is Membership. David Vita has written such a cogent description of the membership process here that I will simply append his document to this one.

## **PATH TO MEMBERSHIP**

**David Vita**

April 7, 2015

I can say without hesitation that we are building a successful membership program here at The Unitarian Church in Westport. Membership has increased each of the past two years with 30 new members in 2013, 40 new members in 2014, and we are at 44 new members so far in 2015. We've had net growth each year. I expect that we will have 120 new members in less than 3 years.

After a period of dormancy we have a Membership Committee that has been active for the past year and a half. The Committee planned the Service on Compo Beach, organized Bring a Friend Day, staffs the Sunday Membership table, works on the Newcomer Orientations, and has taken charge of organizing our name tags.

A little bit of personal background. Many years ago I was a manufacturer's representative with a 6 state sales territory. Some of the lessons that I learned that I apply to membership are that you analyze your client's needs to determine how best to meet them; tell someone what you're going to do, do it, and tell them that you did it; and always, always, always follow up quickly and follow through.

When I spoke to the Board in October, 2012 I said that membership is just like organizing—it's done one to one, face to face, you build relationships, community, and connect people as quickly as possible.

This combination of sales and organizing experience runs through how I approach membership.

### **Membership**

There are basically 4 categories of potential members. They are:

- New folks
- People who have been around (more than 5 years), sometimes active, and are not members for one reason or another.

- People who have fallen through the cracks. They're on the fringe, came here 3-5 years ago and there wasn't follow up. Some have drifted in and out.
- UU transfers

Each group is handled slightly differently. For the purpose of this report I will focus on new folks as that's the most comprehensive approach and elements of that approach are applied to the other three categories.

### **Welcome Card**

The Welcome Card is the entry point to membership. It provides basic information and identifies initial areas of interest. So far this year we have collected 94 Welcome Cards (WC). On some cards no program areas of interest were checked off and on others more than one. Areas of interest checked were:

- Music- 15
- RE- 17
- Social Justice- 45

On the card there is an area to check off as to how the person heard about TUCW. Some cards are blank in this area. Areas checked were:

- Friend- 38
- Website- 20

After that it drops off considerably to Voices Café, Tag Sale, media, UU transfers, and Social Justice activities such as the protest on the Westport Bridge.

### **Initial Contact**

New people are identified (there are obvious keys as to who is a newcomer), greeted, welcomed, spoken with, and invited to fill out a Welcome Card (WC). Notes about the conversation are recorded.

### **Within 48 hours (and often the same day):**

- A copy of the card goes to Ed or Mary (I already have it for SJ) as appropriate for follow-up on music and/or RE.
- The person's WC information is entered into an excel spreadsheet that includes date, email address, relationships, area(s) of interest and how they heard about TUCW.

- A copy of the WC and tracking form is filed in a binder. The tracking form includes everything: contact information, date entered into Constant Contact, CIVI, Neighborhood Circle connection, name tag, 1 to 1 meeting, Newcomer Orientation, Membership, pledging, a record of emails and responses, and follow up actions.
- Email address is entered into Constant Contact and added to appropriate lists.
- A follow-up e-mail from Director of Membership: welcome, thank you for visiting, inviting back, something personal about the interaction, that they will be contacted by Ed, Mary, or David (SJ), and may or may not offer 1 to 1 meeting at this point.

### **In 10-14 days**

From this point going forward I'm very conscious about how much communication each person wants/needs. I don't want to over communicate and I don't want to under communicate so what follows is an average.

An email is sent checking in- have you heard from Mary/Ed, are you receiving emails, do you have any questions, anything that I can help you with etc. For the most part I already know the answers to these questions. It's an "excuse" to communicate because I believe that every communication is an opportunity for connection. Sometimes people will respond that they aren't receiving emails so I check that out or that they have a question, would like to meet, or simply a "thank you" for staying in touch.

### **Follow Up**

It's all about follow up. New folks very readily break down into three groups- hot prospects, medium, and cold. Again, each is treated differently. The example that I will use going forward is that of a hot prospect.

A hot prospect attends 2-3 weeks in a row; sends me an email if they're not coming on a Sunday; indicates an obvious interest in deepening the connection- responds to Ed and Mary; and wants to schedule a meeting within 2-4 weeks of attending.

A medium prospect exhibits the same tendencies but over a longer period of time.

A cold prospect attends once or twice and doesn't respond to emails over an extended period of time.

### **The 1 to 1 Meeting**

The 1 to 1 meeting generally takes place outside of the church over a cup of coffee, sometimes at a person's home, especially if childcare is an issue and can last for as much as 1-1 1/2 hours. We talk about Unitarian Universalism, share personal history and stories, the interim process, Small Group Ministry, Neighborhood Circles, and social justice (if they have indicated an interest in that area) and more. The conversation can go in many different directions- much like the branches of a tree. I spend very little time on RE or music because I've already connected them with Mary and Ed or, if they are now interested in those areas, will do so. After a meeting I can pretty much tell if a person will become a member or not and the overwhelming majority eventually do.

After the meeting I make notes about the conversation and a follow up "to do" list. Someone wants to be connected with a Neighborhood Circle- I locate the Circle and email the Circle Facilitator, or SGM, or someone was a Theater Major so I send an email to Jim Luongo with the person's contact information, or interested in a social action committee so I contact the chair person. All of this is recorded in my tracking binder so that several weeks later I can check in to make sure that the connections happen.

### **Ongoing Follow Up**

Several times a week I flip through every individual page in the tracking binder. Who do I need to call or email, or follow-up on a Circle? Who needs a name tag, is ready to be entered into CIVI (database)? Identify who might be ready to become a member.

I check in with Ed and Mary. Who has become active in music or RE?

I'm also going through RE registrations and pledge data to find folks flying under the radar. I'll find someone who has come in through RE registration but never filled out a Welcome Card and is therefore not in the system. Or discover someone who was here a while ago and returned.

### **Newcomer Orientation**

The Newcomer Orientation used to be three 6 hour sessions with an expectation that at the end folks would become members.

I have a different approach to the Orientations. One session (9:00-2:30) instead of three because so much of what was discussed in three sessions is now covered in the 1 to 1 meeting, ongoing conversations, and email exchanges. Also, folks are connecting quickly- singing in choirs, chairing committees, registering for RE- even before they become members. Connection is key.

I view the Orientation as a process. Wherever someone is on the path to finding out if this is a place for them, if this is their community, if this is their faith then that's the right time to attend an Orientation. At our last Orientation we had one person who had been here once and three people who became members the next day.

### **The Ask**

The membership ask is straight forward. When I feel that the time is right I ask someone to become a member. I answer any questions that the person might have and we talk about pledging. I describe how the budget works, why we pledge, and pledging guidelines. I have no problem talking about money. The person then signs the Membership Book and fills out a pledge card. At this time of the year I have them fill out 2 pledge cards- one for the current year and one for next year.

Everyone who becomes a new member understands about pledging and fulfilling a pledge. After becoming a member I follow up in the pledge tracking system to make sure that the fulfilling part is happening and, if not, contact the person and make sure that it does.

As I look through the list of recent new members the majority of them filled out a Welcome Card (visited us for the first time) in the last 5-8 months.

### **Conclusion**

Membership is growing and will continue to do so.

- We have an effective aggressive approach for connecting with new folks and integrating them into the community.
- A detailed and consistent system has been developed for tracking and follow-up.
- A clear definition of membership.
- Accurate database and pledge information and a commitment to securing pledges and assuring that they're fulfilled.
- An active Membership Committee.