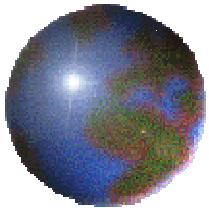




# *Congregations Count!*



*June 22, 2007*

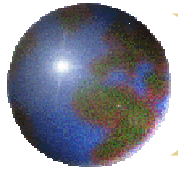
*General Assembly, Portland*

*Presented by Linda Laskowski*

*Unitarian Universalist Church of Berkeley*

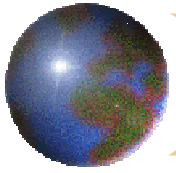
or

**How a UU Membership Chair Stopped  
Trying to Doing Everything**



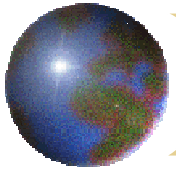
## *The Membership Journey*

- ➊ Becoming aware of Unitarian Universalism
- ➋ Coming as a guest the first time
- ➌ Repeat visits
- ➍ Becoming a member
- ➎ Becoming an active member
- ➏ Leaving membership



## *The Journey is a process*

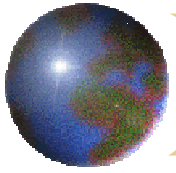
- ✚ Processes are things that happen over and over
- ✚ Process improvement techniques can be used to evaluate them
- ✚ Break down the process into separate steps
- ✚ Measure each step and convert to a ratio
- ✚ Compare with measurements from other processes (churches)
- ✚ Determine what part of the process is not working as well and fix that part
- ✚ Example: Baking a cake!



*Your cake comes out of the oven  
thin and hard as a rock...*

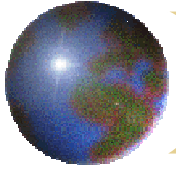
• What went wrong?

• *Compare it to the recipe!*



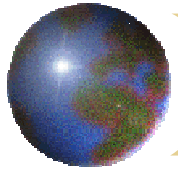
*The cake recipe has ratios that tell you what is most effective for each step*

- Cups of flour per cake
- Salt per cake
- Minutes per cake versus minutes per 12 cupcakes
- You can establish ratios for every process, including for a Membership Journey “recipe”



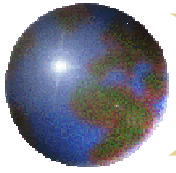
## *What recipe?*

- ❖ Do we have one for UU churches?
- ❖ If not, can we develop one?
- ❖ Do Evangelical churches have one?
- ❖ *The answer to all of the above is a qualified "yes", also known as "sort of"*



## *The Membership Journey: Awareness (Outreach)*

- Measure number of people aware of UU or local UU church(es)
- Divide by total number of people
- Easier said than done
- Not readily available
  - Kansas City (unaided) 0.2% before campaign
- Ask your friends!



# *The Membership Journey*

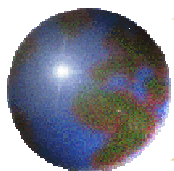
## ✦ Awareness/Outreach

### ✦ First time visitors

#### ▣ Local only

- Thank everyone, but
- Track only the ones that may become members

#### ▣ Ask them to fill out guest card that provides the information we will track



## Welcome! How did you hear about us?

Date: \_\_\_\_\_

Please take a few moments to tell us, and turn in the completed form so we'll be sure to have a name tag ready for your next visit. Thanks!

Name(s): \_\_\_\_\_ Phone: \_\_\_\_\_  
(First) (Last)

\_\_\_\_\_ Email: \_\_\_\_\_  
(First) (Last)

Children (& ages):

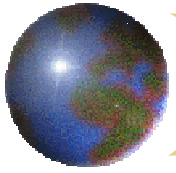
Address: \_\_\_\_\_  
Street Apt.# City State Zip

- How did you find out about us?  Internet  Newspaper  Yellow Pages  Radio  Family  Friend
- Event (please specify) \_\_\_\_\_  UU Affiliation (please specify) \_\_\_\_\_
- Other (please specify) \_\_\_\_\_
- Please check here if you do **not** wish to receive announcements from us.

How may we help you at this time? \_\_\_\_\_

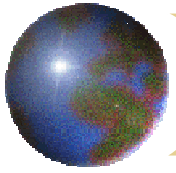
\* We respect your privacy. We will not sell your information or spam you.

Database \_\_\_\_



## *Why use a card instead of a book?*

- ❖ Is there enough room to collect all the information you need?
  - ❖ *Such as how people found you or their email address*
- ❖ *Do people fill in all the blanks?*
  - ❖ *Checking boxes versus filling in blanks can double the number of people providing the information*
- ❖ Is there ever a waiting line at the book?
  - ❖ *Guests at the back are not likely to wait*
  - ❖ *Guests at the front are likely to hurry and not fill everything in*
  - ❖ *Cards can be filled out during the service*



# *The Membership Journey*

## ✦ Awareness/Outreach

### ✦ First time visitors

#### ▣ In town only

- Thank everyone
- Track the ones that may become members

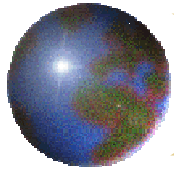
#### ▣ Fill out guest card

#### ▣ Ask guest to make temporary badge

#### ▣ Input information into database

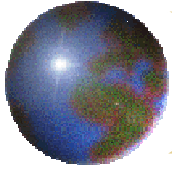
#### ▣ Count totals

#### ▣ Contact guests via email or postcard to thank them for coming

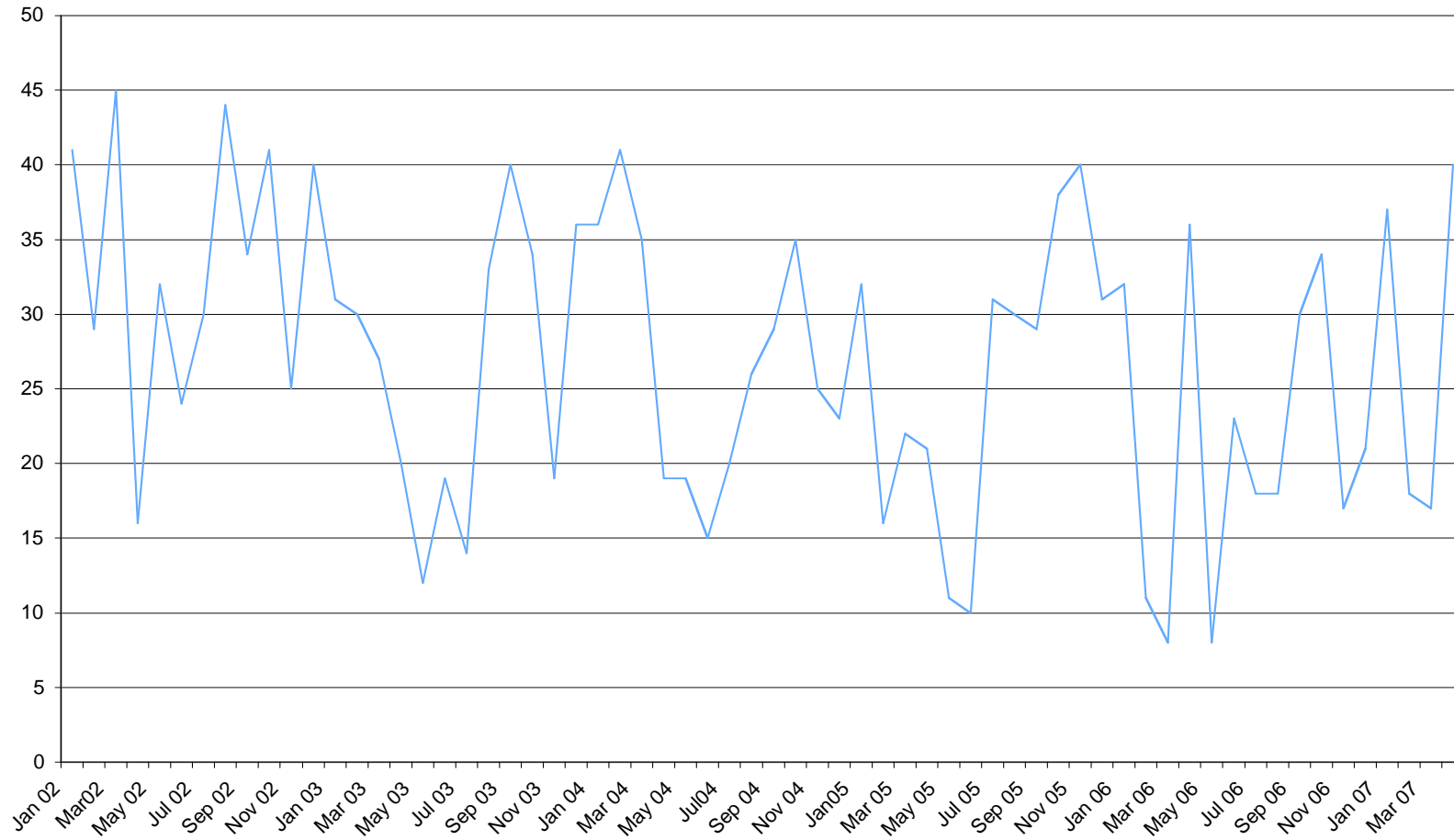


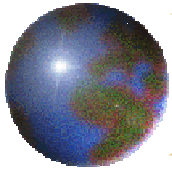
## *UUCB Monthly First Time Guests*

Guests	2003	2004	2005	2006	2007
Jan		36	32	32	37
Feb		41	16	11	18
Mar		35	22	8	17
Apr		19	21	36	40
May	12	19	11	8	
Jun	19	15	10	23	
Jul	14	20	21	18	
Aug	33	26	30	18	
Sep	40	29	36	30	
Oct	34	35	38	34	
Nov	19	25	40	17	
Dec	36	23	31	21	

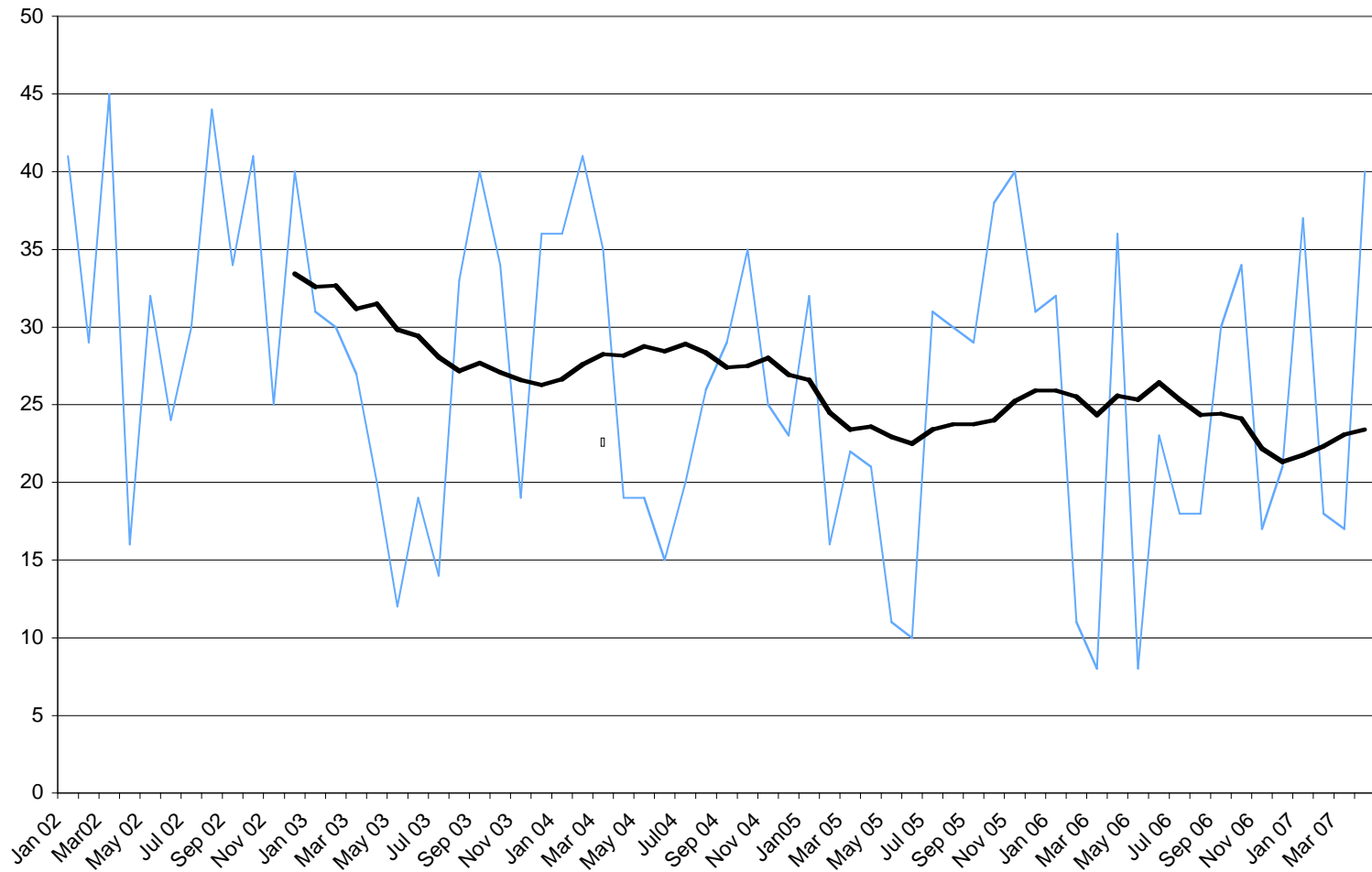


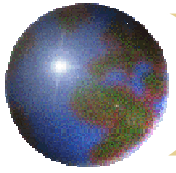
**UUCB Monthly First Time Local Visitors**





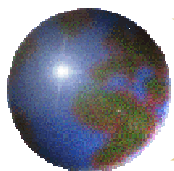
UUCB Monthly First Time Local Visitors





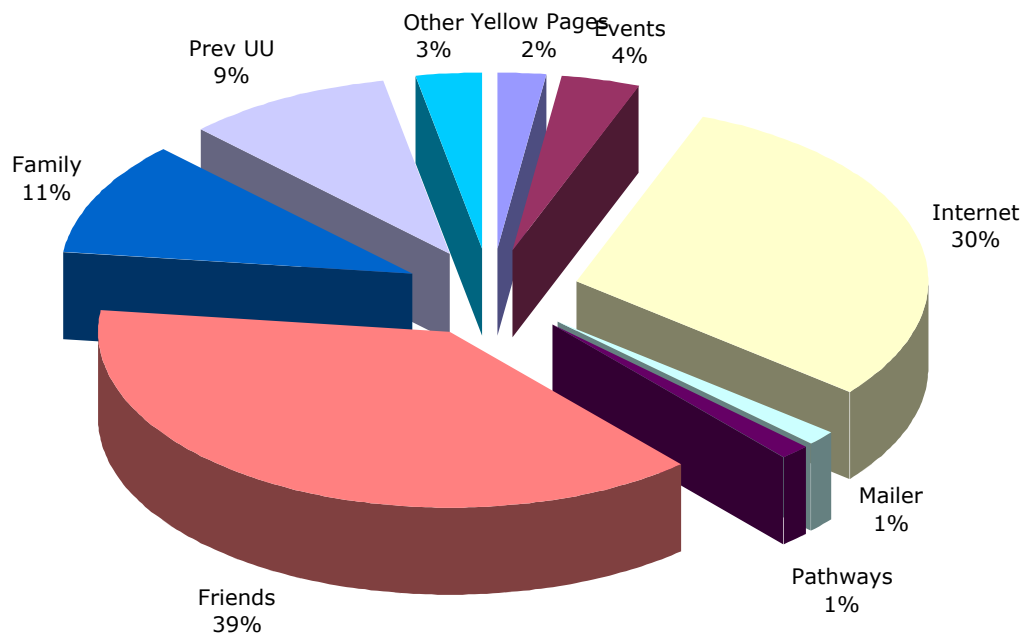
## *How do we compare to other churches?*

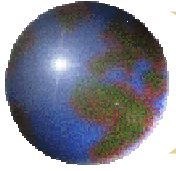
- ✚ What is “normal”, i.e.: the “recipe”
- ✚ Express as a ratio
  - ▣ Count number of guests in a year
  - ▣ Divide by the total number of members
- ✚ Growing churches typically have a ratio greater than 1:1 (source: Interconnections quotations from consultants)
- ✚ Last year UUCB got 256 visitors, and had 511 members (0.5:1)



# *What brings your guests?*

**UUCB 2006 Source of Visitors**





# *The Membership Journey*

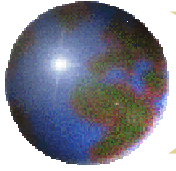
## ☉ Awareness/Outreach

## ☉ First time guests

## ☉ Return guests

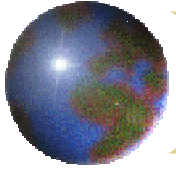
- Use guest register to make up a preprinted badge in a plastic holder
- Put on bulletin board or file alphabetically
- Add coupon to thank them for returning
- Encourage them to return badge each time
- Each time they return, enter date in database
- Count the number of returned guests





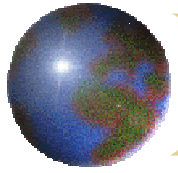
## *How do we compare to other churches?*

- ⊕ Measure number that return in subsequent six months
- ⊕ Express as ratio of returning guests to total for the same month
- ⊕ “Typical” range appears to be 20-40%  
(per discussions with SKSM faculty, UUA staff and evangelical literature)
- ⊕ Should increase as guests “prequalify” themselves via the Internet



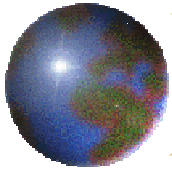
# *Why are your guests not coming back?*

- Ask them!
- Print or online
  - SurveyMonkey is \$20/month
  - Easy to use
  - You send out link via email
  - Supplement with print version

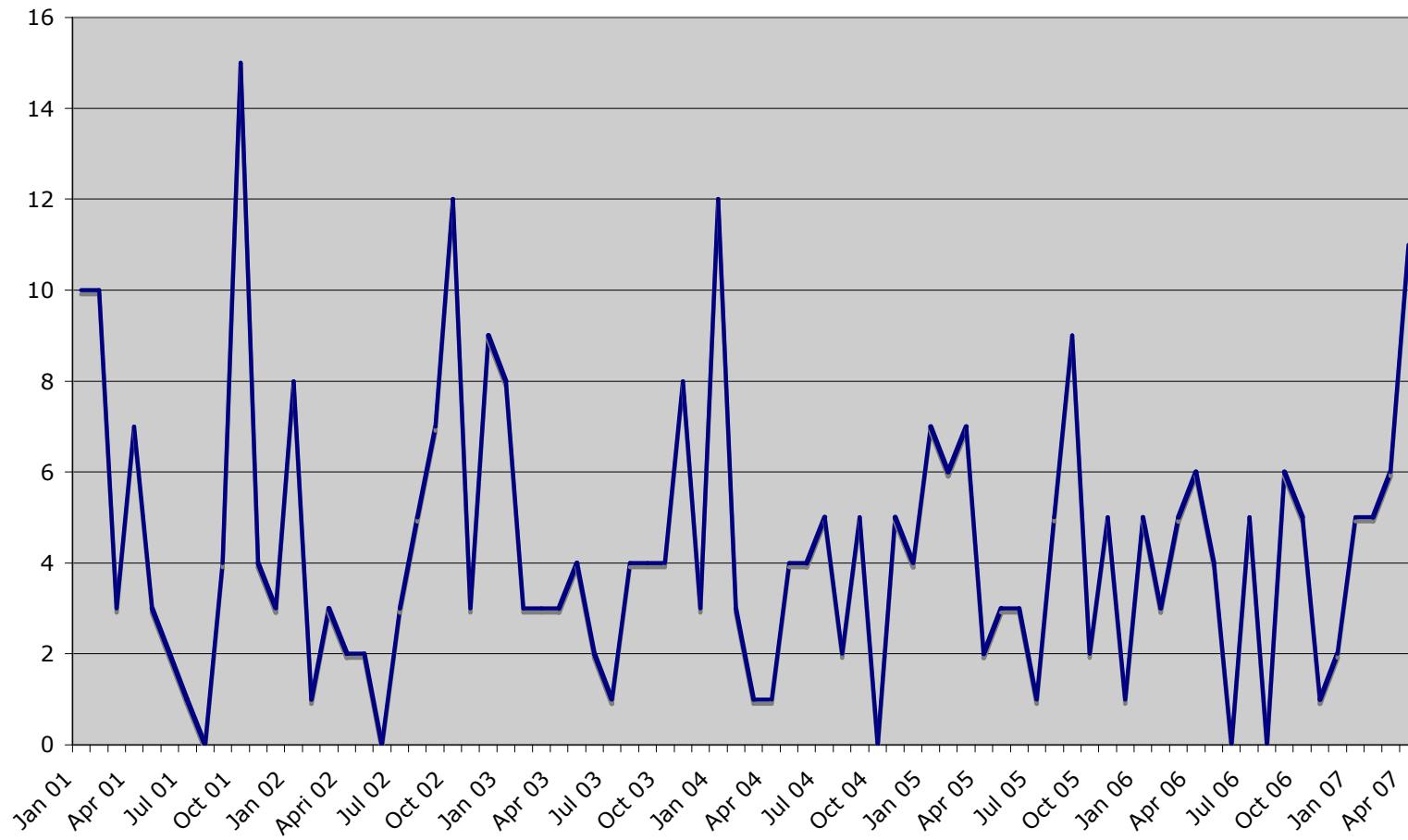


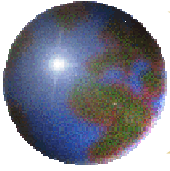
# *The Membership Journey*

- ✚ Awareness
- ✚ First time guests
- ✚ Return guests
- ✚ **New members**

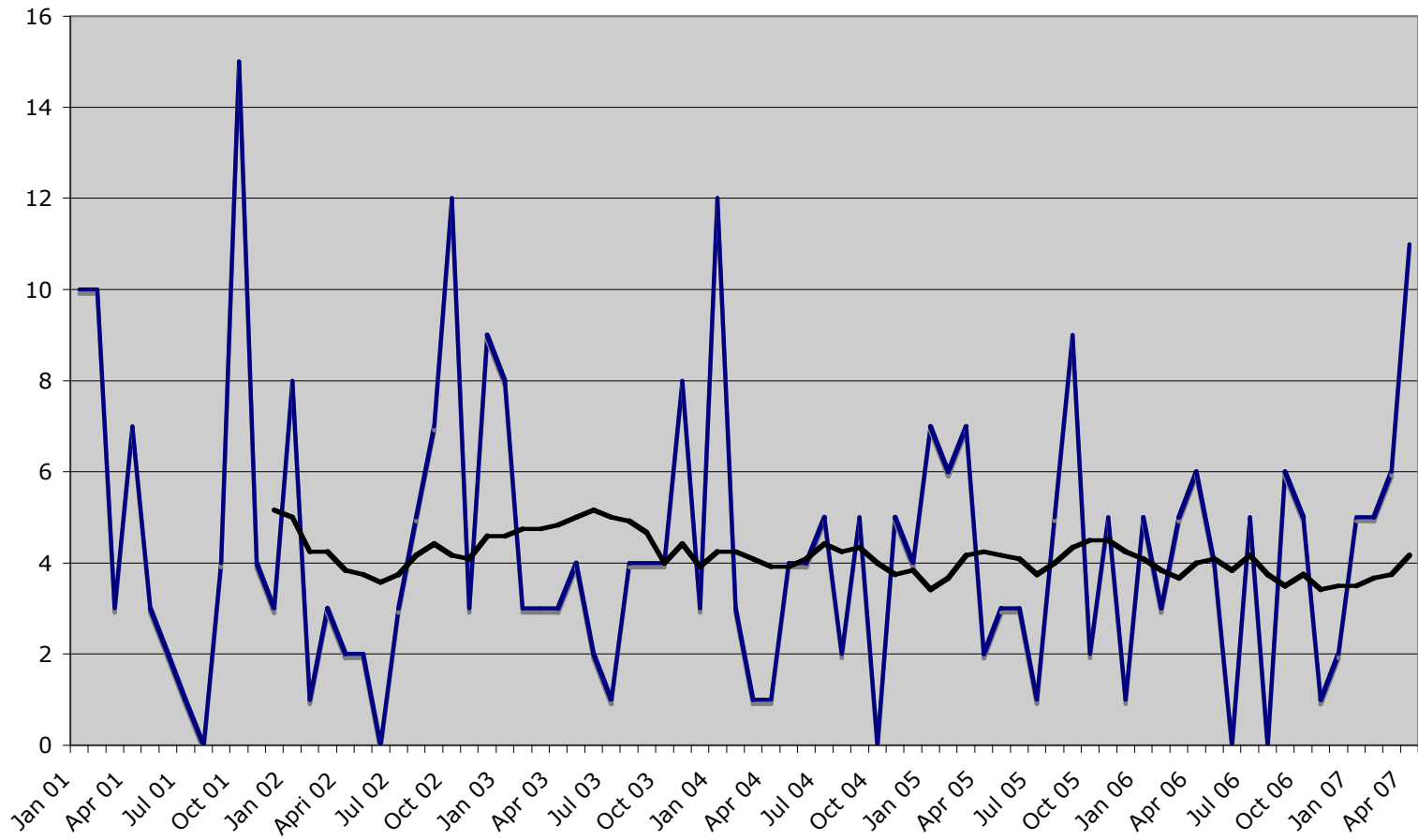


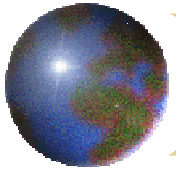
## UUCB New Members





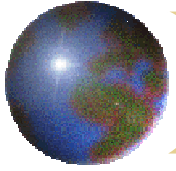
## UUCB New Members





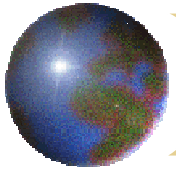
## *How do we compare to other churches?*

- Count new members in a year
- Express as a ratio
  - % new members to first time visitors
  - Expect 12% to 20%
  - Evangelical: 25%
  - Houston campaign (2005): 25%
  - Jefferson Unitarian: 21-30%
  - Declining churches typically at 10-12%



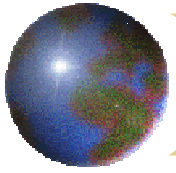
# *The Membership Journey*

- ⊕ Awareness
- ⊕ First time guest
- ⊕ Return guest
- ⊕ New member
- ⊕ **Active Member**
  - ⊞ How many members are active in some ongoing activity other than Sunday worship?
  - ⊞ Evangelicals claim 75% of all members



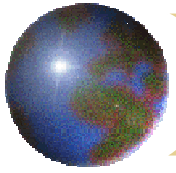
## *What do you do when getting the data you need is too much work?*

- ✚ Focus on what will make the most difference
- ✚ May not be feasible to track entire congregation's activity
- ✚ Track new members
- ✚ Form good habits early and get them connected, which pays dividends later



# *The Membership Journey*

- Awareness
- First time guest
- Return guest
- New member
- Active Member
  - How many members are active in some ongoing activity other than Sunday worship?
  - Keep track of new members only
  - Express as % of new members
  - UUCB at about 65%
  - Evangelical: 90% of new, and 75% of all members!



# *The Membership Journey*

- ✦ Awareness/Outreach

- ✦ First time guest

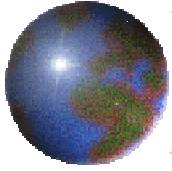
- ✦ Return guest

- ✦ New Member

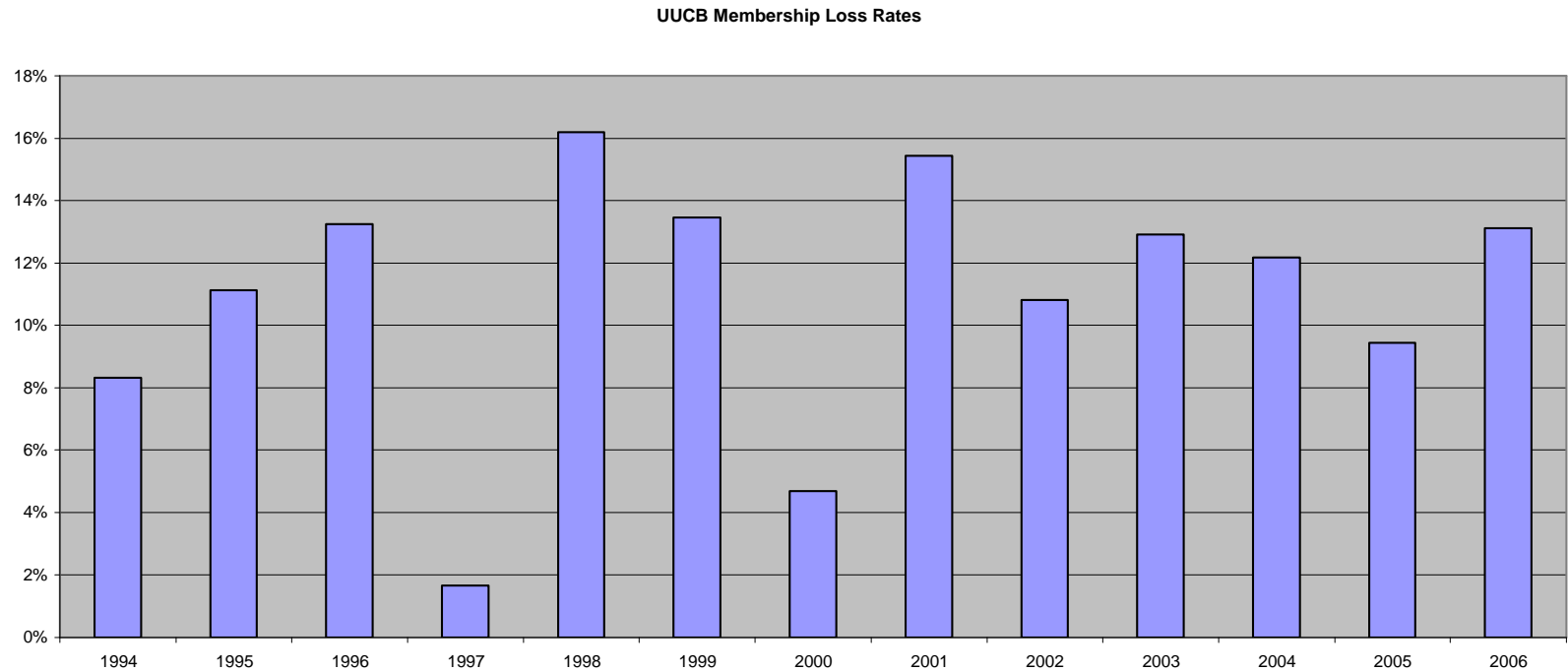
- ✦ Active Member

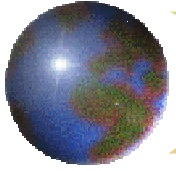
- ✦ Leaving Membership

- What percent of your membership did you lose last year?
- Add last year's new members to the difference between this year's and last year's total members
- Divide by last year's total members



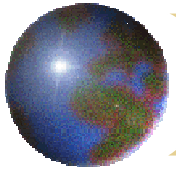
# *UUCB Annual Membership Loss*





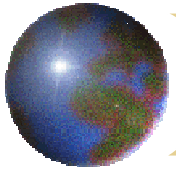
## *Most losses are unavoidable...*

- ✚ Moves are typically half of your losses (depending on how transient the community)
- ✚ Deaths are typically a quarter of your losses (depending on age of congregation)
- ✚ Avoidable losses are those who left but still live in the area



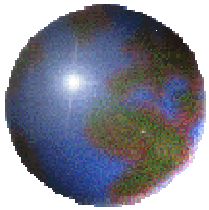
# *The Membership Journey*

- Awareness/Outreach
- First time guest
- Return guest
- New Member
- Active Member
- Leaving Membership
  - Expect to lose about 10-12% of your members each year, depending on how transient
  - Moves are typically 5-6%
  - Deaths are typically 2-3%
  - Unavoidable is usually 2-6%



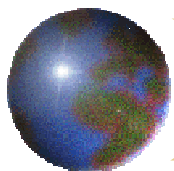
# *Membership Journey Ratios*

- Awareness ????
- First time guests
  - Ratio of guests to total members: >1:1
- Return guests
  - Expect 20-40%
- New Member
  - Conversion of visitors to members: 12%-20% 25%?
  - Evangelical: 25% (within one year)
- Active Member
  - 65% of new members in other than Sunday service
  - 90% of new and 75% of all members (Evangelical)
- Leaving Membership
  - Expect about 10-12% loss each year
  - Evangelical: 6-10%



*You collect the numbers...*

Let's make the analysis easy!



# *Does my congregation get enough visitors to grow?*

Enter the requested information in the shaded yellow boxes

Current number of members

What is provided to UUA as your certified number

Enter ONE of the following

Annual visitors

First time, local adult visitors in the past 12 months

OR

Weekly visitors

Approximate number of first time, local adult visitors every week  
Be sure to average in any weeks you get NO visitors

Ratio of Visitors/Members

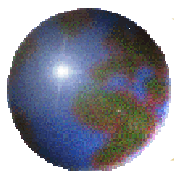
  

If the number in the green box is close to or more than 1, you are probably getting enough visitors to grow.

If your number is close to or over 1 and you are still not growing, you may be unintentionally making visitors feel unwelcome [link to F], not be converting enough visitors to members [link to G], or are losing too many members [link to I].

If the number in the green box is significantly less than 1, you may not be getting enough visitors to grow.

See pages 18-29 of The Membership Journey [link to Membership Journey pdf] for suggestions on how to increase visitors.



# *Does my congregation get enough visitors to grow?*

Enter the requested information in the shaded yellow boxes

Current number of members

486

What is provided to UUA as your certified number

Enter ONE of the following

Annual visitors

256

First time, local adult visitors in the past 12 months

OR

Weekly visitors

Approximate number of first time, local adult visitors every week  
Be sure to average in any weeks you get NO visitors

Ratio of Visitors/Members

0.53

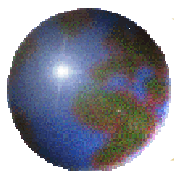
0.00

If the number in the green box is close to or more than 1, you are probably getting enough visitors to grow.

If your number is close to or over 1 and you are still not growing, you may be unintentionally making visitors feel unwelcome [link to F], not be converting enough visitors to members [link to G], or are losing too many members [link to I].

If the number in the green box is significantly less than 1, you may not be getting enough visitors to grow.

See pages 18-29 of The Membership Journey [link to Membership Journey pdf] for suggestions on how to increase visitors.



# *Is our “path to membership” effective?*

Enter the requested data into the yellow shaded boxes

Enter ONE of the following:

Annual visitors

OR

Weekly visitors



First time, local visitors in a given year



Approximate first time, local guests each week

New members



Number of new members who sign the membership book in a given year  
If this number fluctuates significantly, use an average of the past three years

Annual

Conversion rate if you used annual visitor data

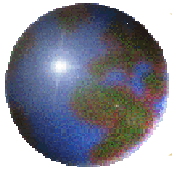
Weekly

Conversion rate if you used weekly visitor data

Evangelical churches claim that 25% of their visitors end up joining the church. Data from Houston suggests a similar number. Most liberal churches appear to be closer to 15-20%.

If the number in the green box is less than 20%, first determine if it is "first impressions". Do your first time guests come back for a second look? [link to F]. Or do you need a more effective way to convert interest to membership?

If the number in the green box is 25% or more, you are likely doing an excellent job of converting guests to members.



# *Is our “path to membership” effective?*

Enter the requested data into the yellow shaded boxes

Enter ONE of the following:

Annual visitors

**256** First time, local visitors in a given year

OR

Weekly visitors

**42** Approximate first time, local guests each week

New members

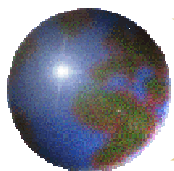
**42** Number of new members who sign the membership book in a given year  
If this number fluctuates significantly, use an average of the past three years

**16%** Conversion rate if you used annual visitor data  
**Weekly** Conversion rate if you used weekly visitor data

Evangelical churches claim that 25% of their visitors end up joining the church. Data from Houston suggests a similar number. Most liberal churches appear to be closer to 15-20%.

If the number in the green box is less than 20%, first determine if it is "first impressions". Do your first time guests come back for a second look? [link to F]. Or do you need a more effective way to convert interest to membership?

If the number in the green box is 25% or more, you are likely doing an excellent job of converting guests to members.



# *How many visitors do we need to meet our growth targets?*

Enter the requested data into the shaded boxes:

Current Number of Members  
Membership Goal (total)  
Years to Growth Goal

What is provided to UUA as your certified number  
Total number of certified members you want to have  
Years between now and the goal. If less than a year, express as a decimal.

Use the following rates (blue boxes) unless you have more accurate ones for your congregation

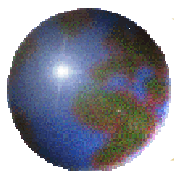
Conversion Rate (New Members/Visitors) **18%**  
Annual Membership Loss Rate **10%**

Use a number between 16-20%, or your percentage from [link to G]  
Use a number between 8 and 12%, or your percentage from [link to I] for TOTAL membership loss

Required number of weekly local, first time guests to reach growth goal

first time, local guests per week

For suggestions on how to reach that many visitors, see pages 18-29 of [link to] The Membership Journey



# How many visitors do we need to reach our growth targets?

Enter the requested data into the shaded boxes:

Current Number of Members	486
Membership Goal (total)	600
Years to Growth Goal	5

What is provided to UUA as your certified number  
Total number of certified members you want to have  
Years between now and the goal. If less than a year, express as a decimal.

Use the following rates (blue boxes) unless you have more accurate ones for your congregation

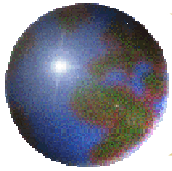
Conversion Rate (New Members/Visitors)	18%
Annual Membership Loss Rate	10%

Use a number between 16-20%, or your percentage from [link to G]  
Use a number between 8 and 12%, or your percentage from [link to I] for TOTAL membership loss

Required number of weekly local, first time guests to reach growth goal

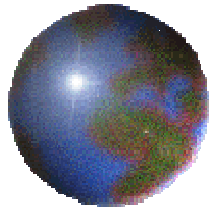
**8** first time, local guests per week

For suggestions on how to reach that many visitors, see pages 18-29 of [link to] The Membership Journey



## *Resources*

- The Membership Journey: a comprehensive guide to all things having to do with various phases of membership  
<http://www25.uua.org/cde/education/MembershipJourney.pdf>
- UUA Congregational Self-Assessment:  
[http://www.uua.org/programs/congservices/uncommon/assessment\\_instructions.html](http://www.uua.org/programs/congservices/uncommon/assessment_instructions.html)
- UUA Membership Listserve:  
<http://lists.uua.org/mailman/listinfo/memb-l>
- Interconnections
- Survey Monkey: [www.surveymonkey.com](http://www.surveymonkey.com)
- UUA website (coming soon)
- CD: one for any congregation who has numbers and will share them with me!
- Email me at [llaskowski12@comcast.net](mailto:llaskowski12@comcast.net) for a copy



*Thanks for your attention!*