



**The Unitarian Church of Baton Rouge**

Love | Connect | Transform

# **BELONGING**

## **RELATIONSHIP IS EVERYTHING**

### **MEMBERSHIP PLAN 2023-2026**

May 31, 2023



“Which is more important,” asked Big Panda, “the journey or the destination?”

“The company.” said Tiny Dragon.

*(Big Panda and Tiny Dragon by James Norbury)*

## Preface

The Board of Trustees' 2022 - 2023 Annual Vision of Ministry charged the Ministry Team Leader with developing a Membership Plan for the Unitarian Church of Baton Rouge. The task of developing and implementing the plan has been delegated to the Minister of Congregational Life and the Membership Team.

The team has crafted the plan with resources from the Unitarian Universalist Association (UUA), the board, ministers, staff, and membership. We are grateful to all who played a part in its publication.

We aim for it to be a living document that inspires our hospitality and growth as it evolves to challenge us and keep pace with our future. We envision that the plan will be available to staff, governance, and volunteer leaders and that it will guide the work of the Membership Team. Its fundamental ideals of belonging, preemptive radical hospitality, anti-oppression, multiculturalism, and anti-oppression will suffuse the membership. We trust that the plan will be transformational.

The Membership Team welcomes comments, questions, suggestions, and other forms of feedback on the strategies and tactics presented herein. You may direct them to Donna Yelverton at [membership@unitarianchurchbr.com](mailto:membership@unitarianchurchbr.com)

Published on  
May 31, 2023

# Table of Contents

<b>PREFACE</b>	<b>2</b>
<b>INTRODUCTION</b>	<b>4</b>
<b>PART I – MEMBERSHIP STRATEGY — BELONGING</b>	<b>5</b>
Why We Want to Grow	
Acknowledging Our Current Culture	
Broadening the Definition of Membership	
Building a Hospitable and Engaged Culture	
Preemptive Radical Hospitality	
Anti-oppression, Multiculturalism, and Accessibility	
Strategy Conclusion	
<b>PART II – TACTICAL PLAN for MEMBERSHIP</b>	<b>19</b>
<b>Membership Team Charge</b>	
<b>Membership Plan Tactics</b>	<b>19</b>
<b>Outreach, Marketing, and Communications</b>	<b>21</b>
<b>Greeting, Welcoming, Hospitality, Ushering, &amp; Safety</b>	<b>29</b>
<b>Member Engagement and Retention</b>	<b>38</b>
<b>Volunteer Coordination &amp; Volunteer Leader Resources</b>	<b>46</b>
<b>Leadership Development</b>	<b>49</b>
<b>Breeze Church Management System</b>	<b>51</b>
<b>Appendix A — Foundational Prerequisites</b>	<b>53</b>
<b>Appendix B — Membership Team Overview</b>	<b>57</b>
<b>Appendix C — Ministry Volunteer Organization</b>	<b>64</b>

# INTRODUCTION

This document results from the charge in the 2022 - 2023 Annual Vision of Ministry that the Ministry Team create a Membership Plan. The plan has two purposes: Part I proposes a membership strategy for endorsement by the Board of Trustees; Part II proposes a tactical plan for implementation with the staff by the Membership Team under the direction of the Minister of Congregational Life.

This plan considers the role of the Unitarian Church of Baton Rouge in the religious movement that is Unitarian Universalism (UU). It expands upon the idea of a faith tradition that looks beyond the goal of increasing numerical membership to consider what a full spectrum of engagement in our UU faith might look like. It views membership as a *process* rather than *the goal*. The process is a gradual progression from lesser to greater commitment that neither begins nor ends at the point of formal joining. Numerical growth, which we value for empowering us to change the world and affirming that our congregation is a place of positive transformation, cannot be our only definition of success; this plan concentrates on *creating a sense of belonging*.

We propose to involve the entire congregation in the process called *preemptive radical hospitality*. We aim to focus on moving from individualism to becoming a *beloved community*<sup>1</sup> of communities<sup>2</sup> where all who embrace UU values can experience a sense of belonging. By practicing the platinum rule of treating everyone the way they want to be treated, we will help those of all cultures at all points on the *faith spectrum*<sup>3</sup> feel they belong. Our distinguishing characteristic will be that we are a people who belong to one another. May we covenant together, making voluntary commitments with our spiritual neighbors, viewing one another as kindred spirits, and interacting with love and compassion to make the world a better place.

Given the Board's endorsement of the Part I strategy, the team will implement the tactics in Part II. The plan covers June 2023 – May 2026, with a focus on creating an annual membership calendar. It is subject to change depending on strategic planning, an adult faith development program, *Annual Visions of Ministry*, the congregational foundations detailed in Appendix A, and the *Article II* work at the UUA.

---

<sup>1</sup> Martin Luther King Jr. envisioned a Beloved Community of love and justice, where the races would be reconciled, and the deep and terrible wounds of racism finally healed. Physical desegregation is not enough," King insisted, for it leaves us "spiritually segregated, where elbows are together and hearts apart." Amanda Udis-Kessler adds:

"Members of Beloved Community who make promises and act on them join the prophetic people who make up the history of Unitarianism and Universalism, and those who are hard at work in today's Unitarian Universalism. By our promises and actions, we proclaim our commitment to a world bursting with joy for all people, a world where people of color do not need to confront racial slurs, discrimination, or violence, a world where no one needs to specify that black lives matter because it's so patently obvious that they do. We don't live in that world yet but we are working our way toward it, one person at a time, one action at a time, one stage at a time, and we are taking care of each other on the way."

<sup>2</sup> To foster inclusion and diversity, Paula Cole Jones of the UUA Congregational Life staff introduced at the 2020 General Assembly Fahs Lecture the notion of congregations as diverse Communities of Communities rather than homogeneous families. <https://www.uua.org/leaderlab/communities>

<sup>3</sup> See illustration in the section titled "Building a Hospitable and Engaged Culture."

## PART I – BACKGROUND & BELONGING

### Why and How We Want to Grow

Congregations that are growing are “communities that see each new person who comes through their doors as a gift — a mysterious treasure whose value will be revealed over time and that will enrich the community in some way. And they know that this takes time, patience, and unconditional, loving-kindness.” So writes Renee Ruchotzke, a UUA Congregational Life consultant specializing in hospitality.

We must first decide that we want to continue the steady growth experienced from 1951 through the beginning of the pandemic. As pointed out in *Congregational Growth in Unitarian Universalism*,<sup>4</sup> our faith has been a refuge to those on the margins of state-imposed religion, those who were labeled heretics, and those who sought to spread a loving vision of human nature in contrast to one of sin and worthlessness. Our history teaches us that we must actively welcome all people of good will. We must create and sustain systems that resist elitism and instead apply the power of our legacy to welcome all who seek the support and values of our movement.

We are called to grow, to take proactive measures that tear down the invisible walls that exclude or marginalize the needs of others, to hold ourselves accountable in how we welcome persons of color, those who are physically challenged, those of low income, and those whose value in society is demeaned (for example, immigrants, non-English speakers, or single-parent families). We want to ensure that no one will experience these invisible walls as signs of their unwelcome status or as further rejection of the value of their place in society.

We embrace the change that growth brings by focusing on two positive aspects of growth: it is **energizing** and **transformative**. Few things **energize** a congregation like the welcoming of enthusiastic new members, delighted to have found Unitarian Universalism. Long-term members feel the affirmation and enrichment of the community through the involvement of new members. The welcoming of new members is joyful, whereas the loss of members is usually sorrowful. Welcoming more members than we lose will naturally make us feel more optimistic about our future than if the reverse were true. Numerical growth is also valued because it brings us more power to change the world, and it **affirms that our congregation is a place of positive transformation**. Our openness to persons of different spiritual journeys—our conviction that “we need not think alike, to love alike”—draws in individuals who want a spiritual home of diverse thought and free inquiry. Our church makes space for renewal and strength, a place for us to encourage growth, goodness, and generosity.

---

<sup>4</sup> <https://www.uua.org/files/documents/congservices/conggrowth.pdf>

We have a responsibility to share our faith as a compassionate response to those who seek to live a life of integrity and service in community.

## Acknowledging Our Current Culture

### Membership

Our culture is one in which members themselves generally decide that they are members. We have few requirements for joining the church, and the only ways for members to leave are death or notifying us that they no longer wish to be a member. This culture has the advantage of being inclusive, in that all who live in and around Baton Rouge (or any place from which they wish to join us virtually) and embrace Unitarian Universalist values can be considered members.

This culture has, however, led to continuing financial challenges, as we have decided against making pledging (or even completing an annual pledge card with a zero pledge) a membership requirement. Since we have eschewed debt, our alternatives for financial stability include:

- Revisiting the decision to require pledging as a requirement for membership
- Attracting more new members who honor the expectation of pledging
- Increasing the number of existing members who honor the expectation of pledging
- Involving connected friends in financially supporting our work
- Undertaking fundraising projects that attract congregational and public participation and building our rental income
- Building our Endowment Fund and planned giving program
- Cutting ministry programs and/or staffing

Of these alternatives, this plan will focus on: attracting more seekers to the spectrum of faithful relationship; involving connected friends; and growing the commitment of members.

### Diversity

We value diversity and consider ourselves to be a welcoming congregation. The UUA designated our church as a welcoming congregation for the LGBTQIA+ community. Since our founding, we have welcomed people of color. We tend to think of ourselves as educated, upper-middle class. And while our membership tends to be majority

white, older, female, and able-bodied, we know that we are more diverse than many UU congregations.

## **Social Justice**

Social justice is important to us, and we focus our work on community partnerships that improve the lives of those who have been historically marginalized.

## **Accessibility**

We have taken steps to improve accessibility, including streaming our services, T-coil technology for those with hearing impairment, a new safer parking lot, better lighting, a ramp to the chancel, video-conferencing for meetings, and allowing proxy or early voting for those who can't attend membership meetings in person. Yet accessibility challenges remain.

## **Shared Ministry**

Our former longtime senior minister did much of the work of the church for us. Consequently, we need to build a culture of shared ministry. We are engaged in the initial development of our congregational foundations and the healthy culture that embodies shared ministry. (See Appendix A for recommendations about formalizing our core values, our covenant, our mission, and our vision.)

Some things we already do well:

- Our Branches small group ministry program is strong and has helped our ministers share with Branches leaders, who in turn share with their members.
- We took a major step toward shared ministry by having the 2022 and 2023 pledge drives be led by the generosity team.

We need more of such sharing. Becoming a more vibrant congregation requires a high level of covenantal trust among and between the ministers, staff, lay leaders, volunteers, members, and friends. All potential and existing members must promise themselves and each other to be in service to that which is greater than individuals or even the church itself – our mission.

## **Broadening the Definition of Membership**

To define Membership, the team relies on *Belonging ... The Meaning of Membership*, the 2001 report to the UUA by the Commission on Appraisal.<sup>5</sup> The Commission suggested that congregations have traditionally followed what Conrad Wright, in his

---

<sup>5</sup> <https://www.uua.org/files/documents/coa/belonging.pdf>

essay *A Doctrine of the Church for Liberals*, says about congregations: they “function in two spheres operating out of two different value systems which may be in tension with one another.” One sphere is made up of a covenanted body of worshippers. The other is the sphere of the corporation established by law with power to hold property for religious, educational, and philanthropic purposes.

To participate in the corporation called “The Unitarian Church of Baton Rouge,” our bylaws require that a person over a certain age sign a card expressing sympathy with the mission of the church and that they be welcomed by the Board of Trustees. Active members may vote on the business of the church, serve on the Board, and serve as delegates to the UUA General Assembly. Inactive members who have not participated for over two years may reactivate their membership merely by participating.

We recognize, however, that the number of active members is not the number of actual members. Our membership is a living community that is not static and may vary from week to week. As the Commission acknowledged, the community is “influenced by births and deaths, by affection and alienation, by hurt feelings and reconciliations, by generosity and cold-heartedness, by anger and enthusiasm, by all the exigencies and contingencies of life.” Participation in this spiritual body, a living thing, makes one a member “in the deepest theological sense.” Participation also “transforms an agglomeration of individuals into a community.”

The UUA estimates that the number of people who identify as UUs is about four times the membership of UU congregations. While about 150,000 people are members of Unitarian Universalist congregations in the United States, over 600,000 Americans identify as Unitarian Universalist. We also understand that the majority of children raised as UUs do not join UU congregations as young adults. **To successfully build community, we must reach out to and embrace all those who share our values but are unlikely to attend traditional religious services or join any church.**

Thus, we need to begin thinking of membership as a process of belonging that is not linear. Though our bylaws define organizational membership, the process of membership in our community is a gradual progression from lesser to greater commitment that both precedes and follows the act of formal joining. For the individual and the church community, the meaning of membership changes over time and is a constantly changing process.

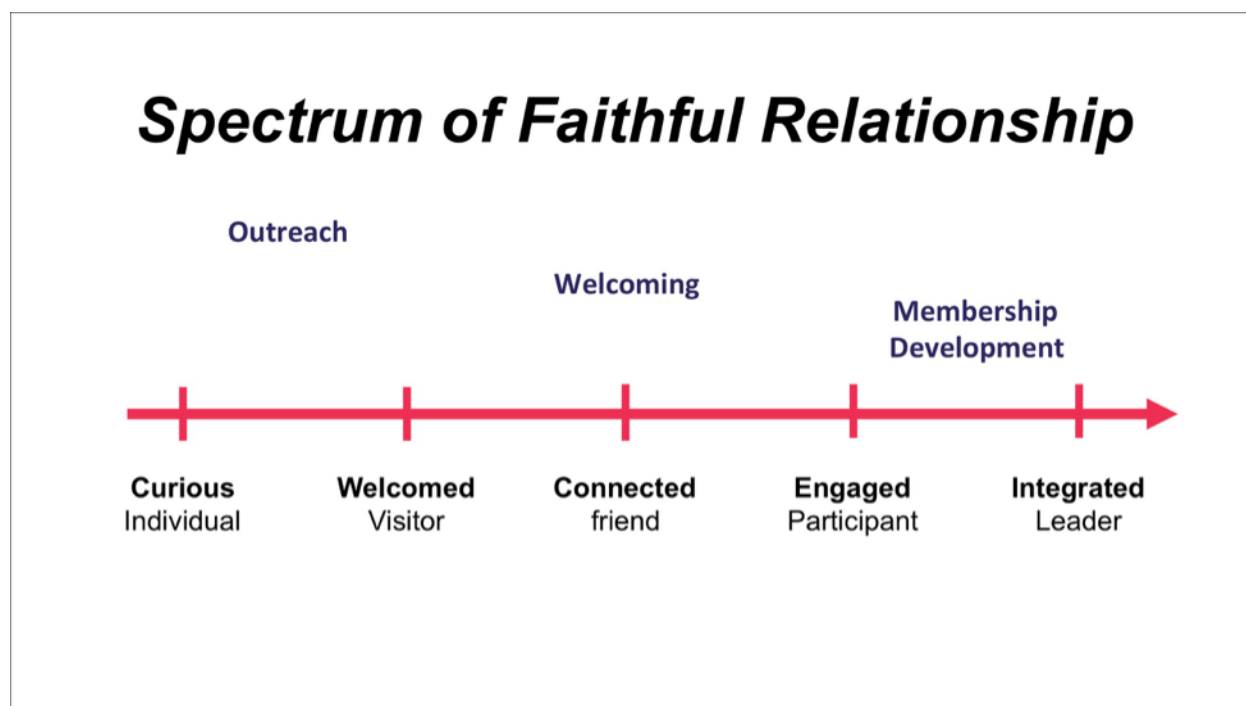
Building a community requires commitment. While some may say they seek a spiritual community but want nothing to do with organized religion, the reality is that both spirituality and organization are necessary. “The church’s job is to lead people to the discovery of the spiritual truth that it is only by giving that we receive, giving not only our money but ourselves.” (See *Belonging, The Process of Commitment*, pp. 8-9.)



In other words, anyone making a commitment to building our community is considered a member of our community.

## Building a Hospitable and Engaged Culture

The Membership Team (Team) has primary responsibility for developing the Membership process that the UUA calls the *Spectrum of Faithful Relationship*.<sup>6</sup> The spectrum acknowledges that there are distinct levels of belonging to our faith community. Rather than the traditional model of church that kept track of only membership, this spectrum re-conceives what it means to be connected to Unitarian Universalism.



- *Curious Individuals* are people who know us and are in sympathy with our values, but not involved in our programs or ministries. They might include those who participate in community activities related to a church group, follow us on social media, share our content, read UU books, or support our social justice actions.
- *Welcomed Visitors* are involved with our programs or ministries at a basic or fluid level and may or may not identify as UU. They may attend events that we host, occasionally attend Sunday services, or participate in community-oriented

<sup>6</sup> <https://www.uua.org/leaderlab/member-engagement>. Rather than a path to membership, this spectrum acknowledges that some nonjoiners will remain “friends.”

programs, such as a lecture series. They may have a friend or family member who serves as a tie to the congregation.

For success in these first two stages, the UUA recommends that we pay attention to how we show up virtually (website, social media, search functions, news media, etc.), so we “look as beautiful from the outside as . . . from the inside.” Carey McDonald<sup>7</sup> suggests creating multiple entry points that do not revolve around Sunday morning and paying attention to the visitor experience at all of these entry points. While one transition between welcomed visitor and connected friend is the traditional “pathway to membership,” we must learn to support all transitions.

- *Connected Friends*: After attending services several times, those who attend a one-time or low commitment activity outside of services have become connected individuals, with better opportunities to meet people and start building relationships. They need to be offered easy opportunities to meet others without making a big commitment, such as a Circle Supper, a one time small group, or helping with set-up at an event.
- *Engaged Individuals*: Once people get involved in regular activities, such as an affinity group, small group ministry, teaching religious education, or serving on a ministry team, they have engaged with the community. Participation in these programs requires ownership and expectations of regular participation and opportunities to share spiritual journeys with each other.
- *Integrated Leaders* are in this stage in the spectrum, as volunteer leaders. They are committed to changing the community and put their efforts into making our community better as a committee chair or ministry team or small group leader. At some point, these leaders may become simply an engaged member again.

We need to understand that some people will move in both directions on the spectrum, and that some will leave our path. We want to support them in their journey and leave room for them to comfortably return should their path bring them back.

## Preemptive Radical Hospitality

The Team must help every member of the congregation be open to and welcoming to everyone. To expand the reach and diversity of the congregation, the Team encourages frank acknowledgment of our strengths and weaknesses and the need to help educate all members on relationship building and anti-oppression. How we aspire to welcome seekers, guests,<sup>8</sup> friends, and members is best described by a church-wide dedication

<sup>7</sup> See *What if Membership Was a Spectrum?* By Carey McDonald, Lori Emison Claire, and Marie Luna, UUA Blogs, describing a workshop they offered at the 2015 General Assembly.

<sup>8</sup> Note to Reader: Throughout this document, we refer to not-yet-members who attend our services as “guests,” rather than “visitors.” Visitors are persons who reside temporarily, or who make a short stay at a place for a particular purpose. As we focus on being more welcoming, let’s consider new folks to be “guests,” or persons we welcome into our church home and to whom we extend hospitality, those we hold in honor and to whom are due special courtesies.

to *preemptive radical hospitality*, a combination of the spiritual practice of hospitality and preemptive radical inclusion.

We will focus on a *spiritual practice of hospitality* that reflects an approach suggested by David Rynick<sup>9</sup> on how we welcome people into our communities. Practicing hospitality is an individual work of intentional action that creates the quality of relationships in our church that will nourish newcomers and longtime members alike. Practicing hospitality allows us to express our belief in the inherent worth and dignity of each person. Through our actions of hospitality, we will move toward creating a world in which all are treated with justice, equality, and compassion.

Mere hospitality is, however, insufficient. We must strive for what CB Beal<sup>10</sup> calls *Preemptive Radical Inclusion* (PRI). A framework used by Justice and Peace Consulting, PRI is an adaptive set of perspectives and practices that we can use to increase justice and equity in our lives and organizations. More than just a philosophical approach, it is an intervention, an activity, and a process. It requires reflection and exploration, and it leads us to make decisions about what our next moves will be to involve everyone within those spaces in which we have hospitality responsibility. Beal explains:

“Whether it is gender, sexuality, race, class, ability, family structure, emotional/psychological, neurological or physical uniqueness, or other human characteristics, we can practice inclusion from the first moment we gather. Practicing *Preemptive Radical Inclusion* means we choose to operate from the assumption that everyone is always, and already, “in the room” as we lead. It is Preemptive because we don’t wait for someone to tell us that they are or need x, y, or z before we start having their presence impact how we think, speak, and act. It is Radical because we make the radical decision that x, y, and z are already part of our definition and perspective of who “WE” are.

“When we practice Preemptive Radical Inclusion we don’t wait for people to self-disclose about their identities or experience before we decide how to include them, and we choose not to make assumptions based on our expectations or observations. We simply create a space that is based on the idea that *All of Us* means All of Us, All of the Time. PRI means that leaders do the work of thinking ahead about how we can create the most welcoming, inclusive environment possible. Preemptive Radical Inclusion requires radical self examination and trust that while some growing edges might be tense, it is

---

<sup>9</sup> David Rynick is a life and leadership coach. He is a member of the First Unitarian Church of Worcester, Massachusetts, and one of the founders and guiding teachers of the Boundless Way Zen community.

<sup>10</sup> CB Beal, M.Div. specializes in facilitating learning experiences that involve issues of marginalization, oppression, and privilege, helping participants hold the complexities of their lives in perspective, to co-create a safe[r] brave[r] space within which people can be challenged to learn and grow.

an ethical necessity that as people of faith we do the work necessary to create inclusive and just environments.”

Renee Ruchotzke, a UUA Congregational Life hospitality consultant, describes Radical Hospitality Theology:

“An ideal of a liberal faith community is to provide a safe space, a place where we don’t have to check a part of ourselves at the door. Our Welcoming Congregation program helps us to do this for the LGBT community. We aspire to be a place where our interiors and our exteriors are the same. Sometimes this means we have an interior ideal and we struggle to match our actions with our beliefs. Other times this means we practice acting in the way we know is right, and work to transform our attitudes and beliefs through our right actions. Sometimes the interior and exterior become so strongly aligned that we can become almost rigid in our convictions.

“Practicing radical hospitality opens up possibilities for interaction with different people, allowing for diverse experiences and an expanded creative interchange. And it’s about meeting people where they are. It’s about learning together. We are all works in progress.”

Radical hospitality is about examining our assumptions. None of us claim to know the truth. But the way we get closer to the truth is to gather as a congregation and try to figure it out together. New and different people will add new and different ideas to ours.

From preemptive radical hospitality comes relationships and belonging. The team believes that a focus on belonging rather than membership can help the church grow in all five categories identified by Loren B. Mead<sup>11</sup>:

1. **Organic Growth**—The task of building the community, fashioning the organizational structures, developing the practices and processes that result in a dependable, stable network of human relationships in which we can grow and from which we can make a difference. It is also the physical plant and the staff needed for the size of the congregation.
2. **Maturation Growth**—The ability of a congregation to challenge, support and encourage each one of its members to grow in the maturity of their faith, to deepen their spiritual roots, and to broaden their religious imagination. It is also the ability of the congregation as an institution to go deeper into the faith while maintaining the welcoming path for newcomers.
3. **Incarnational Growth**—What are the “outputs” of the congregation’s ministry? What is it that the congregation seeks to export from its life into the life of the

---

<sup>11</sup> Loren B. Mead, an ordained Episcopal priest, was an educator, consultant, and author who worked to strengthen religious institutions, especially local congregations. He founded the Alban Institute.

world and to the social environment in which it exists? What are the good works that we are doing that will make the world a better place?

4. **Growing in Connections**—Growing awareness of the importance and relevance of connections, e.g. involvement in UUA regional and national activities, other congregations, denominations, and community connections, as well as with other people in the congregation.
5. **Numerical Growth**—Adding new members and friends while maintaining the number of members already within the congregation. Keeping track of losses and understanding why they happen. Changing the things that need to be changed in order to retain members. Never compromising ethics or principles. Understanding that some losses are healthy or inevitable.

Thus, we expect that building relationships and creating a sense of belonging, rather than focusing only on numerical growth, can make the church more sustainable. Reverend Ken Sloane<sup>12</sup> writes that even stewardship is all about relationships. He notes that less-engaged members may think the need to be welcoming applies only to the membership team, the ushers and greeters, or the ministers. He cautions us all: “Don’t be mistaken . . . funding mission and ministry is built on building and maintaining relationships. When someone visits your church, the possibility of becoming a supporter of your mission or even making a second visit will depend on whether that person is offered the seed for a growing relationship.”

According to Dr. Charles Arn,<sup>13</sup> we must cultivate among all of our members a culture of friendliness. Friendliness, though necessary, is not enough. We recognize that growing Unitarian Universalism’s support of historically marginalized communities is a core recommendation of the 2020 *Widening the Circle of Concern report from the Commission on Institutional Change*.<sup>14</sup> Without sensitivity about preventing microaggressions, we can come across as unwelcoming to those who are not like most of us. How, then, do we expand our hospitality?

We need ongoing intention, education, and structural change to enable us to be hospitable to all. We must provide seekers and members from marginalized groups and oppressed cultures with needed support while longer-term cultural change is happening.

## Anti-oppression, Multiculturalism, and Accessibility

To be a welcoming community, we must demonstrate our commitment to promoting equity, inclusion, and diversity, while opposing racism, sexism, heterosexism, classism, ableism, ageism, transgender oppression, religious oppression, and any other type of

<sup>12</sup>Rev. Ken Sloane is the Director of Stewardship & Connectional Ministries for the Discipleship Ministries.

<sup>13</sup> Dr. Charles Arn is Visiting Professor of Outreach and Ministry at Wesley Seminary (Marion, IN), and president of Church Growth, Inc. (Glendora, CA).

<sup>14</sup> <https://www.uua.org/uuagovernance/committees/cic/widening>

oppression that gives one group power and privilege at the expense of another group. This commitment is evident through its priority in our annual vision of ministry and through funding for programs and development that includes Black people, Indigenous people, people of color, LGBTQIA+ people, people of all abilities, classes, socioeconomic and education levels, as well as for children, youth and adults of all ages. While it is also evident in our outreach through our work as members of Together Baton Rouge and the Interfaith Federation, we perceive a need to widen our outreach to reach all seekers.

Also necessary is access to sensitivity awareness and spiritual skills building for the entire congregation and especially for those directly involved in hospitality and welcoming. We must learn to recognize oppression, question and challenge our own assumptions and practices, and create new approaches that counteract oppression. The team recommends and will promote cultural diversity programs and education, including the Anti-Oppression Study Group, that provide awareness and understanding of privilege, oppression, and intersectionality.

Note that each section of Part II of this plan will address aspects of diversity, inclusion, anti-oppression and accessibility that are unique to particular tactical activities. We provide here an overview of our recommendations for diversity, inclusion, and for challenging the systemic biases that devalue and marginalize differences.

Our church community needs to understand how not to further wound others who may be marginalized due to race, ethnicity, culture, gender identity, sexual identity, social class, socioeconomic status, age, educational level, professional role, religion or spiritual beliefs, mental or physical ability, body size or appearance, or English language literacy.

Beyond that understanding, we need to ensure that we preemptively consider and provide the radical hospitality to meet the physical, emotional, and spiritual needs of people of all ages, races, ethnicities, cultures, gender identities, sexual identities, social classes, socioeconomic levels, educational levels, professional roles, religious or spiritual beliefs, mental or physical abilities, body sizes, appearance, and degrees of literacy in the English language.

Specifically, we acknowledge the need for skills in welcoming:

**PEOPLE OF COLOR:** While our congregation has been racially integrated since its beginning, we must acknowledge the anti-Blackness that prevails in our world against descendants of formerly enslaved persons. We also need to know how to welcome indigenous people, Asian-Americans, and other people of color. Many of us wish for more racial diversity in the seats around us each week. We have worked to become aware of the cultural biases built into the way we “do church.” The team will work to

overcome those biases by helping promote and facilitate classes, discussions, and antiracism and multicultural work.

**GENDER, SEXUAL ORIENTATION :** At a time when many religious groups are working against the rights of individuals with sexual orientation differences, affectional differences, or both, we must continue to offer a sanctuary and a solace to those LGBTQIA+ neighbors who seek a religious home. Our denomination has been on record as supporting the rights of lesbians, gay men, and bisexuals since 1970, and it formed The Office of Bisexual, Gay, Lesbian, Transgender Concerns in 1973. The UUA has advocated against sodomy laws and job and housing discrimination, and for ceremonies of union and same-gender marriage, the right to serve in the military, the right to lead congregations as ministers and religious professionals, and the right to be parents and for transgender people's rights.

We need to ensure we as a church are as welcoming as we can be by continually challenging our cisgender heteronormative assumptions when dealing with gay, lesbian, bisexual, non-binary, asexual, aromantic, and polyamorous people and issues. We must be aware of issues around sexism against women, oppression of gender ambiguous people, transgender, genderqueer or intersex people.

**PEOPLE OF ALL ETHNICITIES:** We must recognize the oppression around country of origin, ethnicity, and immigration and citizenship status.

**PEOPLE OF ALL INCOMES and LEVELS OF FORMAL EDUCATION:** Our church, like many Unitarian Universalist congregations, exists in a university community, and many of our members are highly educated. We know that one need not have a degree to be a seeker or a questioner or to be drawn to the freedom, reason, and tolerance of Unitarian Universalism. The Membership Team will help the congregation examine our assumptions and practices with an eye to embracing a broader spectrum of the population.

**YOUTH and YOUNG ADULTS:** The church recently shifted its emphasis from religious education to family ministry. While our children are engaged in church activities, we hope to encourage our adolescents not to turn away from the faith of their parents and our young adults to be more engaged.

According to Michael Tino, UUA Director, Campus Ministry and Young Adult Services, "In a truly intergenerational community, people of all ages are valued and respected for what they have to bring, and each person is given the opportunity to interact with and learn from people at different points in their lives." In ministering to and working with youth and young adults, we should seek to "welcome them, recognize their gifts and talents, uphold their experience, and offer opportunities for personal and faith development in the caring embrace of a congregation."

The Membership Team will work with Family Ministry to help children and youth feel welcomed and supported in their personal religious journeys. We aim to build a congregational culture that better supports youth and young adults.

**PEOPLE WITH ACCESSIBILITY CHALLENGES:** Disability justice is a priority for our congregation. We must work to counter ableism, advance disability justice, and promote full inclusion in our local church and community. Full participation in all aspects of our congregational life for people with disabilities is our aspiration.

We have a history of going beyond the requirements of the Americans with Disabilities Act of 1990. We provide accommodations to meet the needs of our members and guests because we value individual inherent worth and dignity. Our congregational leaders worked with the architects and builders to design and build our campus, and intentionally included elements to make our facility more accessible. Our bathrooms nearest the sanctuary are accessible. We provide flexible seating, allowing chairs to be spaced for mobility aids. Adding state-of-the-art sound equipment and T-coil loop technology helps those with hearing deficits in the sanctuary. For those with low vision, our new equipment allows the projection of song lyrics and other worship aids in large typefaces. We offer copies of *Songs for the Journey* hymnal in large type and in Braille.

For those unable to attend in person, we offer streaming of services and have purchased an “OWL” system for including people remotely in virtual or hybrid meetings. We acknowledge, however, that not everyone is able to participate in aspects of church life that require access to or use of electronic means of communication. We need to accommodate their needs with printed matter sent via personal delivery or USPS or by telephoning.

Other areas for improvement include: equipping one or more meeting rooms with enhancements for those with hearing impairment; improved signage directing people to the restrooms and classrooms; and assistance for those with or without mobility aids who find the journey from parking lot to building to seating physically difficult.

We will work with other church leaders to ensure accessibility. We recently learned that in late 2022, the UUA and EqUUal Access signed a Memorandum of Understanding (MOU) to support congregations’ work for accessibility and inclusion and for expanding our commitments to disability justice. The MOU ensures that the UUA will provide more resources and staff to address ableism within Unitarian Universalism and to support equity in the engagement of disabled people in society as a whole. We plan to establish contact with the resulting group to take advantage of their anti-ableism help.

Despite the work done by our church to improve accessibility, we know that people with disabilities can still find life challenging as they navigate a world that can deride them and may not accommodate their needs. To capitalize on the many contributions that adults and children with disabilities could make to our church, the Membership



Team is committed to fostering both accessibility and anti-ableism work to normalize living with disabilities and being accepting of people who are experiencing disabilities.

We need help in challenging our assumptions about disabilities, as many conditions and barriers are invisible or not readily evident. We must also remember that even those of us without disability are only temporarily able-bodied.

While we need to prepare our pathways and meeting spaces in advance (preemptively) to accommodate all mobility aids, body shapes and sizes, other areas of accessibility must also be addressed. We need to be aware of chemical sensitivity as to cleaning supplies and other chemical agents. Our hospitality must include foods that everyone can eat and clearly marked food sensitivity information for those who are vegans, vegetarians, gluten-sensitive, have nut allergies, etc. We need to be aware of people who are blind or have vision difficulties, are deaf or hard of hearing and prepare in advance of their needing assistance.

We must also consider the needs of those who may experience accessibility challenges due to learning or experiential difficulties. We may need to help those with intellectual, emotional, educational, or English language challenges.

The tactical sections in PART II explain how the Membership Team will take advantage of the most up-to-date Congregational Accessibility Resources by following the roadmap laid out on the EqUUal Access website at [www.uua.org/leaderlab/accessibility-resources](http://www.uua.org/leaderlab/accessibility-resources).<sup>15</sup>

## Strategy Conclusion

The Membership Team is grateful for the opportunity to develop and deliver this Membership Plan. The Board has expressed its support of the approach presented above that focuses on a sense of belonging as core to our membership growth. To complement its implementation, we request that the Board consider several programs and foundational components outside of the Team's purview that may need to be affirmed, updated, or newly established, and then commit to doing so.

We recommend that the congregational foundation include the following:

- A statement of core values
- A congregational covenant
- Updated mission and vision statement

---

<sup>15</sup> Accessible ministry and programs (communication, fellowship, food & drink, caring, religious education, social justice, website, worship & theology) and Accessible Buildings and Grounds (entryway, grounds and outside, interior movement, lighting, parking, public transportation, ramps, sanctuary, and signage).

- Adding a sixth expectation of membership to include “Extend preemptive radical hospitality to all”

Please see Appendix A for background and support information on these and other aspects of our congregational foundation that are outside the purview of the Membership Team.

As the Board has indicated its initial concurrence with this strategy, the Membership Team now begins articulation and implementation of the tactical part of the Plan.

## PART II –Tactical Plan

### Membership Team Charge

The Membership Team, under the direction of the Minister of Congregational Life, is responsible for growing and retaining an engaged and more culturally diverse Unitarian Church of Baton Rouge community to which all who share Unitarian Universalist values can feel a sense of belonging. The team works with the ministers, staff, board, and volunteer leaders to develop and implement a cradle-to-grave spectrum of faith development. The team works with members to encourage discussion and learning about welcoming and hospitality and the need for growth to support the church into perpetuity. The team equips members, volunteers, and volunteer leaders with tools and practices to help ensure the sustainability of the church. The Membership Team grows the congregation by moving us from being a singular community of individuals to an interdependent web of diverse communities.

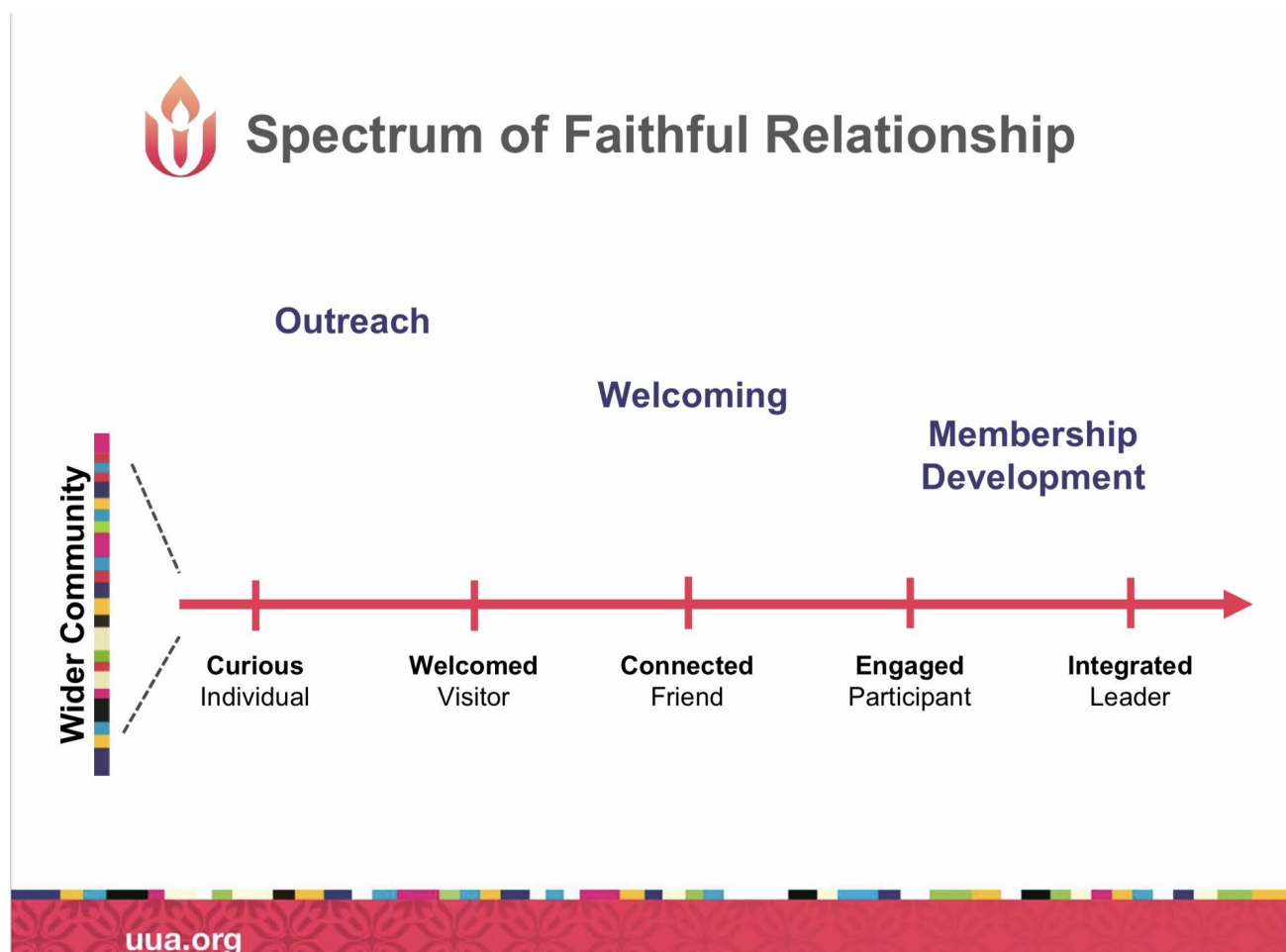
### Membership Plan Tactics

Each of the following tactical sections of the plan addresses a particular membership task, considering a framework that includes:

- Imagining a vision or dream, best practices or desired state for accomplishing the task
- Documenting our history around the task or assessing the status quo
- Identifying the gaps between the status quo and the vision
- Recommending tactics to bridge the gaps
- Assigning responsibility for the tactics
- Formulating a timeline for implementing the tactics

The Membership Team will help the church succeed along the faith development spectrum by ensuring that facilitators and team leaders know how to welcome newcomers at each stage. We must have training in place for leaders to ensure they have healthy boundaries and motives consistent with the mission of our congregation. We must have a way to track attendance (e.g., through scanning via cellphone or a name badge system that is monitored by team members). We must enhance our database system to help us know where people fall on the spectrum to facilitate recruiting for programs and volunteer opportunities, discovering emerging leaders, and helping those who need assistance in connecting.

The tasks are organized by their relationship to the Spectrum of Faithful Relationship:



# Outreach, Marketing, and Communications

“It is long past time for us, as Unitarian Universalists, to bravely move beyond our superficial differences and discomfort in talking about our beliefs and do the challenging, but important, work of identifying and deepening the core of our faith. Having done so, we will see that there are many more people who share our beliefs than we ever imagined...people hungry for a meaningful faith in these challenging, uncertain days of a young century. Let us finally resolve to truly become the religious beacon our heritage has equipped us to be. The time is now, the world is ready, and the hour is late.” (Jim Key, Moderator of the Association, Southern Regional Assembly keynote address April 2014)

## Introduction

Our Membership Plan includes a comprehensive Outreach, Marketing, and Communications component that projects a cohesive message internally and externally, online and in-person. Our outreach process will be reciprocal: we will refine our public identity and message as we share it through our online presence, we will identify new audiences as we expand our messaging via social media. As we draw new people in, we will adjust the design and promotion of our outreach-focused events accordingly. We will leverage our capable team of staff and volunteers who already manage internal communications, the weekly bulletin, and announcements, as well as the digital sign, to turn our ministries outward to our communities, ensuring that our values reach new groups of people inside and outside our congregation.

## Outreach

Up to 90% of people who visit or join a church do so because someone they know invited them.<sup>16</sup> The most effective outreach is for members to invite friends, neighbors, relatives, coworkers, and fellow volunteers and social activists to services or activities. We envision other outreach activities, as well.

### Vision for Outreach

We propose an annual Friendship Sunday on a particular Sunday when the visitor experience is central to the design and planning.<sup>17</sup> The short-term goal is not to increase membership but to enable our friends, neighbors, and loved ones to experience the place that brings us joy and meaning. We would involve the entire congregation, providing suggested language for invitations. Considering that the average UU invites a person to church only once every 26 years, hosting this event could skew that statistic in a single week!

---

<sup>16</sup> See generally the UUA LeaderLab booklet entitled *Hospitality and Inclusion: A Guide to Welcoming and Integrating Newcomers*.

<sup>17</sup> The focus should be on a social justice event, a special service such as the Jazz Service, or a big celebration.

Attracting new members and friends is not, however, the sole—or even the primary—reason for outreach. While we want to make the community aware of us, we also use outreach to make the community a better place.

To achieve this, we endorse the church's participation in the following:

- Together Baton Rouge, a broad-based coalition of congregations and community-based organizations in the Greater Baton Rouge area with the capacity to address community problems large and small. TBR is deliberate about crossing the lines of race, religion, neighborhood, and political affiliation. It organizes to build the power to address issues affecting families and communities. TBR is part of the Industrial Areas Foundation (IAF), the nation's oldest and largest broad-based organizing network.
- Together Louisiana is a statewide network of more than 250 congregations and civic organizations, representing over 200,000 people. Among the largest grassroots organizations in the history of Louisiana, its mission is to give faith and community-based organizations an opportunity to develop the leadership capacity of their members and effect change on a larger scale than they could alone.
- The Interfaith Federation of Greater Baton Rouge, whose mission is to cultivate interfaith understanding and cooperation to reduce human suffering in Greater Baton Rouge. Our outreach could include participation in programs such as the Annual CommUNITY Prayer Breakfast, World Peace Day, Hunger Walk, and the Holy Grill, as well as reinvigorating our relationship with our sister church, Camphor United Methodist, or establishing relationships with other churches who serve communities that we, too, want to serve.
- Baton Rouge Pride: We will apply for a listing in the Baton Rouge Pride business directory. We should help publicize and/or participate in events such as: Queer History Film Series; Call Me Crowdaddy: Crawfish Boil Social & Costume Contest; The Annual Baton Rouge Pride Talent Show, and The Annual Baton Rouge Pride Festival.
- The Red Shoes, a nonprofit center offering opportunities for spiritual enrichment and personal growth through book and film studies, weekend retreats, and workshops. Its mission statement is: The Red Shoes is a women's center for personal and spiritual growth that celebrates, empowers, and nurtures women.
- Establishing UU campus groups at LSU, Southern, and BRCC. Current faculty members in our church could help get these groups started. An interim alternative to UU start-up groups could be partnering with denominations that already have a campus presence, such as the Wesley United Methodist Ministry at ULL (in community with Methodist, Episcopal, and Presbyterian churches).
- Developing a Satellite Strategy that reaches out into the Baton Rouge Community and beyond to establish a UU community in Lake Charles, Lafayette, or other locales.

- Forming a council of Louisiana UU churches or a council of South Louisiana UU churches to share outreach, support, and fellowship.
- Strengthening our ties with the UUA Southern Region staff and with UUA subject matter experts.
- Building on the effectiveness of our outreach via our streamed services, website, social media, and weekly emails.

## Marketing

The American Marketing Association defines Marketing as “the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.”

### Our Marketing Vision Emphasizes Publicity

We will focus first on free publicity in places where our target audiences surf or go. We need to ensure that press releases about our speakers and programs get sent to media outlets that serve our target demographics. We need blogs that feature our theology and programming. We need UU apparel that can be worn by our members.

Social justice projects will get our congregation noticed in the community. Besides being a worthwhile way to build our community, projects can offer free publicity and make a statement about what our congregation stands for.

- We could publicize and set up petition signing drives in the parking lot or breezeway as a way to attract seekers who share our values.
- An Annual Downsizing event could benefit members and the community and be in keeping with our values.
  - This event takes the ordinary yard sale to a whole new level. Members donate items that they no longer need or want and offer them free to the wider community.
  - We could limit items or have people decide their own limits.
  - We could set up a donation jar for a designated eco-charity and offer free information on eco-friendly, simple living. We could pass out free cookies and water.
  - This event would have an entirely different tone from an ordinary yard sale and could publicize our environmental values in a unique, beautiful way.
- While Special Sundays such as all-ages holiday services can be entry points for seekers if they are planned and publicized well, entry points are normally those in which the guest experience is central to the design and planning.<sup>18</sup>

---

<sup>18</sup> Some examples from other congregations: Seedy Saturday, annual event to celebrate and learn about gardening and environmental issues (Unitarian Congregation in Mississauga, ON), Luna Rising, community celebration of women and girls (UU Church of Charlotte, NC), Hogwarts/CampUU, Harry Potter-themed summer camp for ages 6-11 (First UU Church of Austin, TX), For the Love of Tiny Houses,

- We should consider more publicity around our shared offerings, including having the checks hand-delivered to recipient organizations with ceremony and photographs.

### **Consider Targeted Affordable Advertising**

Advertising is expensive. For example, in 2008, eight congregations in the Tampa Bay area were involved in a \$225,700 advertising campaign to promote Unitarian Universalism.<sup>19</sup> In retrospect, the campaign staff concluded:

- They met their goals for generating brand awareness, increasing visitor attendance, creating excitement among Tampa Bay Area UUs, and fostering a sense of inter-congregational community.
- Marketing is particularly difficult—and important—for Unitarian Universalism because of our low brand/name awareness. We need to proactively educate the public about our values, history, and theology. Brand education is critically important.
- Marketing has a long-term impact. It is difficult to measure a direct response to church marketing. Studies indicate that people search for a church community when they are “in transition” or “in tension”—when their lives have changed in profound ways. People will visit us when they are in need. It is good for them to know ahead of time who we are and that they will find a welcoming home.

The team recommends that limited targeted advertising be considered once our budget permits. Radio ads can be more economical than print. Public radio underwriting, however, may reach only others like most of our members—WRKF’s audience parallels our demographics. Should we instead consider targeting more diverse radio audiences if we advertise?<sup>20</sup> What about placing ads on bus shelters and benches? What about shared billboards?

### **Branding**

The American Marketing Association defines brand as a “name, term, sign, symbol or design, or a combination of them intended to identify the goods and services of one seller or group of sellers and to differentiate them from those of other sellers.”

We have a decision to make about our branding: do we continue to be one of the congregations in an association of UU congregations or do we begin to think of ourselves as a part of a religious movement? According to Reverend Peter Morales,

---

showcase of the tiny house movement as a response to the lack of affordable housing (UU Fellowship of Redwood City, CA), Play GroUUp, weekly gathering of toddlers and parents (UU Congregation of Las Vegas, NV).

<sup>19</sup>[https://www.uua.org/files/documents/congservices/marketing/regional/090315\\_tb\\_one\\_year.pdf](https://www.uua.org/files/documents/congservices/marketing/regional/090315_tb_one_year.pdf)

<sup>20</sup> For example, 106.5, the gospel radio station.



“[t]he difference is potentially huge.” Writing in *Congregations and Beyond* when he was the UUA president, he explained:

“Congregations as local parishes arose in a different era. They arose in a time of limited mobility and communication. Most members lived within a couple of miles of their church. When Unitarianism and Universalism were in their infancy, no one would think of belonging to a congregation ten miles away. Churches were the centers of community life in a largely agricultural society. To be limited to a traditional parish form of organization in the 21st century is like limiting ourselves to technology that does not require electricity.”

Reverend Morales lists some of the implications of thinking of ourselves as a religious movement rather than merely part of a collection of congregations, calling them “profound and liberating.”

- We focus more on connection and less on “membership.” Paying attention to who our ministry serves, how many lives we change and the difference we are making in the world can help us redirect our efforts outward. [We acknowledge the need to simultaneously be mindful of our need for pledges and financial support that have traditionally depended on members and friends.]
- We invite people to connect to our UU movement whether or not they choose to join our congregation. We can reach out to young adults, students, snow birds, people living in foreign countries, linguistic and ethnic minorities, etc. They can all be part of the UU movement.
- We find ways to invite into our movement some of the 500,000 or so people who say they are UUs but are not members of a congregation.
- We have a way of inspiring people who share our values, want to be part of our movement, but are not ready to join a congregation.
- We continue our efforts to connect with UU college students. We would make clear that they are still a part of our movement.

We have addressed in Appendix A the need for congregation-wide planning to address development of a branding strategy in line with this Plan, including:

- finding the right name for our organization
- adopting a logo
- developing a theme line/tag line
- adopting a font and color scheme that will be consistently used for all of our marketing

Will we become the Unitarian Universalist Church of Baton Rouge? Will we adopt the UUA logo, branding, and communications style manual? Doing so seems to fit with the spirit of this plan.

## Communications

The team defines communications as the process by which information is exchanged between the church and its constituents. We differentiate it from marketing and publicity, which are usually generated by the church and received by constituents.

### **Our Communications Vision**

We envision a centralized, up-to-date communications system that meets the needs of staff, volunteers, and consumers within the church and interfaces with marketing and outreach to increase our visibility and take our message to the community.

We want to craft an effective system for communicating about events and calendar entries and establish a quick reference tool to ensure that all the information is disseminated in a timely manner on social media. We currently use a Google Drive spreadsheet to share information with staff and volunteer leaders. This live document has the potential to be a powerful tool, but there is room for improving both the organization of the information and the upkeep. The effectiveness of the spreadsheet depends on the regular updates and clear and organized information. See the section on the Breeze Church Management System for an alternative.

We also envision a folder or cloud space that would serve as a system for creating and sharing art that can be used for different needs. Currently, art specific to events announced on slides, email, and social media posts is created independently, and not always shared. Rather than individual communications to members using their personal Canva<sup>21</sup> accounts, we recommend that the church invest in a Canva account that would allow access to and sharing of the art.

We also envision an interactive CTA<sup>22</sup> social media button asking users to answer questions from the ministers, without collecting unnecessary personally identifiable information. Not only would the interaction engage viewers and prompt responses, it could also boost our algorithm on Facebook and Instagram.

We will work with the Communications Team to provide announcements on the digital church sign.

### **Current Communications Status**

Our Communications Team functions with staff members and volunteers.

---

<sup>21</sup> Canva is a graphic design platform used to create social media graphics and presentations. The app includes ready-made templates, and the platform is free and offers paid subscriptions such as Canva Pro and Canva for Enterprise for additional functionality.

<sup>22</sup>“Call-to-Action” buttons like, Read more, Take me there, Sign Up, Do it, or other such versions on various sites, prompting social media users to take action.

- Pennie Nichols coordinates the Membership Team's interface with the Communications Team, and also manages the church's Instagram presence and the Order of Service.
- Congregational Administrator Allison Hall provides general communications support, website and calendar updates, and weekly emailed bulletins and announcements.
- Lee Hartman produces the slides for worship services and manages the website.
- Marla Elsea handles website and calendar updates, Facebook administration, and monitors the YouTube Chat.
- Sarah Eich manages the digital sign.

### **Tactics to Achieve the Communications Vision**

- Establish a system to make the **Communications Log** a FIRST STOP for any events, event updates, and calendaring. Work toward including it in the Breeze enhancements.
- **Automated notifications:** Look for settings that notify users if a change is made to the log. Those who depend on the log should set their accounts up to receive those notifications.
- **Create a UCBR paid Canva account** or, if one already exists, give access to all members of the Communications team.
- Consider a **monthly newsletter** to describe upcoming events, provide reports from ministry teams and the board, give recognition, and highlight feature stories.

### **Outreach, Marketing & Communication Wrap-up**

A subteam for Outreach, Marketing, Branding, and Internal Communication will be established under the auspices of the Membership Team. The subteam will be co-led by Pennie Nichols and Denise Crowe. We anticipate that Becky Cureau, Jan Dardenne, and others will staff the team. Pennie will be the liaison with the church's communications staff and volunteers. We will appoint a member to interface with the Social Justice Team. We will seek volunteer event planners and photographers.

This subteam will address the Marketing, Outreach, and Branding possibilities identified herein to distill them into specific tactics for scheduling and implementation beginning in 2024.

While much of the communications work will be done by the Communications Team, the Membership Team will provide support coordinated by Pennie Nichols for the identified tactics.

- **Ministers, Staff, Teams, and Volunteers** will all be responsible for using the **Communications log** or Breeze as a first stop to communicate announcements, events, and so on.
- If a paid **Canva account** is established for the church, someone in-house (Lee or Allison?) should set it up.
- **All Communication Team Members** should set up Google Drive so that it sends **notifications** via email or this should be done via Breeze.
- **All Communication Team Members** will explore the possibility of a monthly **Newsletter**.
- **Rev. Nathan Ryan, Rev. Chris Long, and DFM Kathy Smith** will submit **questions** to Marla and Pennie (or on the Communications log) that can be used on Social Media.
- **Fundraising Committee and Sara Eich:** Sign up form for paid announcements on the sign (Maybe fundraising makes the form, Sara executes the announcements). Donna will socialize possibilities with other volunteer leaders.

### Proposed Timeline

- We propose to deliver a comprehensive Marketing, Outreach, and Communications Plan in the Second Quarter of 2024. Meanwhile, we will identify additional volunteers with marketing and communications expertise while implementing the components of this proposed plan as appropriate.
- We will develop a media strategy by mid-2024 and begin to prepare the congregation for being part of the outreach and for embracing the growth and diversity that will result.
- Many of the outreach tactics identified are already underway. We suggest that the Social Justice Team, Interfaith Federation, and Pride outreach activities continue.
- During 2024, we will act on Rev. Nathan's request that we consider investigating and evaluating Project Orange<sup>23</sup> and other megachurch outreach strategies.

For Communications team tactics, the proposed timeline is.

- Immediately: Communication Log Compliance (everyone) and explore transition to Breeze.
- By end of Second Quarter 2023
  - Questions from ministers and Kathy (3 questions will cover posts for 2 months)
  - Set up Canva account (Allison? Lee?)
  - Sign up for paid announcements on the sign

---

<sup>23</sup> While we have not yet researched it, we understand that Project Orange focuses on influencing leaders to influence parents and the faith community to influence the future of the next generation with a message that mobilizes them to love god and serve others.

## Greeting, Welcoming, Hospitality, Ushering & Safety

### Our Vision

Radical hospitality is a congregational norm that is radically inclusive, not out of duty, but out of our anticipation of how each new person will change us. For best practices to achieve our vision of radical hospitality, we consulted the *Guide for Welcoming and Integrating Newcomers*<sup>24</sup> (Guide). The more varied our experiences and the more we interact with different people, the greater the increase of “human good.” Our constant challenge is to keep reminding ourselves that we are in community with people who may not be like most of us.

The most important factor in determining whether guests return to our church is how “friendly” they find us to be. Friendliness is determined in the ten minutes after the worship service ends and is measured by how many people reach out to say hello. In the average stable church, one in ten visitors returns a second time.

Consequently, the gathering time for coffee, tea, and snacks after each Sunday service is a key part of our church’s welcoming activities. We envision adding “Hosts” as members of the Hospitality Team. Hosts would be tasked, along with other members of the Welcoming Team, with the goal of making sure our guests and newcomers return each Sunday. Although Hosts’ responsibilities would include providing family-friendly drinks and snacks, taking into consideration varying dietary specifications and needs, their most important role would be to welcome guests and newcomers in a manner that builds relationships and our beloved community of communities. They would be trained, along with other members of the Welcoming Team, in how to welcome guests and newcomers in a non-othering way, consistent with our church’s mission and values. It is vital that Hosts be trained in multiculturalism, anti-oppression, and preemptive hospitality.

The UUA website cites a Pew Research Center study that shows that fewer people are participating in religious communities, especially Christianity. They identify as “nones,” rather than with a faith or denomination. Increasingly, younger generations are the ones exiting religious institutions. And UUs are not immune. As institutional religions decline, more who enter our doors are not refugees from other faiths but are experiencing faith communities for the first time.

Therefore, we envision an introduction to our church and its mission, values, and principles as an important part of our welcoming. Hosts will be prepared to provide tours of the church and grounds, explain our programming for children and adults,

---

<sup>24</sup> <https://www.uua.org/leaderlab/hospitality>

direct folks to meetings and activities, guide them to and be available to explain brochures and information about our UU community, assist those who may need help navigating the church website or signing up for the newsletter online, ensure guests have opportunities to meet the minister(s), staff members, lay leaders, as well as other guests, newcomers, church members and friends.

Hosts will also be prepared to answer questions and know where to find resources, such as UUA brochures, books about our faith available for loan, fire extinguishers, defibrillators, first aid kits, hearing devices, large-print hymnals, the lost & found basket and more. Following best practices, before guests depart, hosts would invite each guest to an upcoming event, activity, or service.

In the interim, until this cadre of hosts is recruited and trained, the Membership Team has begun moving toward this vision by setting up a membership table that is staffed before and after services, and during the middle hour as needed. Team members are available to answer questions, give directions, facilitate the talents recording process, provide Branches information and Member Resource Books, and help update member contact information in the Breeze database.

Our ushers will focus on being greeters and on making everyone feel welcome, whether they are newcomers, long-time members, or any place on the spectrum of belonging. We have held one spiritual retreat for newcomers and will continue to provide opportunities for spiritual awareness for welcoming people of diverse cultural, racial, or economic backgrounds and in not making assumptions about people.

We also envision a safe church. Ushers will be trained by the Safe Building and Congregation Team to share with the ministers, teachers, and staff the responsibility for safety and security of the congregation.<sup>25</sup> While not expected to act as police officers or security guards, ushers, once trained, will be expected to observe people and surroundings, assess danger, and respond appropriately. They may encounter situations ranging from disruptive behavior during a service, to a medical emergency, to an active shooter (statistically unlikely but distinctly imaginable given our current overheated political atmosphere). Ushers, as observers during the services, are in a position to respond when ministers and staff, who are busy conducting the service, are not.

In many ways ushers, greeters, and even hosts may serve a “flight attendant” role — being hospitable and friendly and, in case of emergency, trained by the Safe Building and Congregation Team to direct people to exits and remain calm. Because the functions of ushering overlap with other membership volunteers such as proposed

---

<sup>25</sup> The Membership Team expresses appreciation to Melanie Mayeux, chair of the Safe Building and Congregation Team, for providing relevant content of the Safe Church Plan regarding ushers’ and greeters’ involvement in keeping the congregation safe.

hospitality hosts and greeters, safety concerns will be considered when assigning roles and securing volunteers.

The Safe Building and Congregation Team has provided us with their vision for safety. The Emergency Procedure Manual they are developing:

- Outlines procedures for emergencies including fire, inclement weather, medical problems, hostile intruders or threats. Included will be communications protocols, evacuation maps, and increased building safety
- Calls for installation of a secure entry system
- Calls for installation of strategically placed security cameras outside of the building
- Provides for recruiting a team of volunteers to act as a safety team on Sunday mornings and at other church-wide events
- Provides training for groups such as worship staff, greeters, ushers, and RE teachers in evacuation and shelter-in-place procedures, as well as in CPR and first aid

## History and Status Quo

Our hospitality pre-pandemic included two ushers who staffed a welcome table that focused on visitors. The ushers served as greeters, provided visitor name tags, handed out orders of service, collected the offering, and then counted the donations either during or after each service. David Lindenfeld coordinated the schedule for ushering volunteers, who generally served at one service per month. A small group of dedicated volunteers prepared coffee and snacks for coffee hour in the fellowship hall following both services. Members and visitors mingled during coffee hour without planned greeting activities, though some members made a point of seeking out visitors to make them feel welcome.

Since returning to in-person worship following covid, there are sixteen regular ushers and thirteen substitutes. The regular ushers serve one Sunday a month, and the substitutes cover vacancies and the occasional fifth Sunday of the month. Ushers are reminded of their slots via an automated service, [signup.com](https://signup.com). The team is experienced and dedicated – in over a year since we reopened, only one regular usher has resigned, having moved away.

Distribution of Orders of Service (OOS) was formerly a primary job for the ushers. Now attendees either print the OOS at home, or they can scan the QR code at the welcome or membership tables. Ushers continue to collect the offering, count the money, and count attendees. They are also the first line of greeters, stationed at the welcome table near the parking lot. There they greet visitors, facilitate visitor name tags and visitor information forms, provide attendees with assistance to and from their vehicles,

provide umbrellas, wheelchairs, or other needed help, and staff the best vantage point for safety observation.

Temporary name tags are completed at the welcome table by members (blue borders) and guests (gold borders) who so desire. First-time guests are encouraged to fill out a form providing their contact information and indicating if they want to be added to our email list. The usher places the form in the church administrator's mailbox, and she emails a follow-up letter signed by both ministers and the Director of Family Ministry.

Prior to the end of both services, Bonnie Brown, Suzanne Besse, and occasional volunteers or recruits prepare and set out coffee, tea, and snacks in the area outside the kitchen. Due to middle hour programming, there is no longer a coffee hour between the services. Coffee purchases are in the budget, and the church administrator orders the supplies. Suzanne (and occasionally others) provides snacks for both services. All Sunday service snacks and teas are donated. Suzanne sets out snacks and coffee for both services and cleans the kitchen afterwards, often with help from volunteers. In the past, Connie Holmes provided kitchen clean-up, sometimes with volunteers who signed up at the CCT table, but that is no longer happening.

Since the onset of covid, we have moved from in-person services to an online service, then outdoor services along with a virtual service, and back to two in-person services supplemented by streaming the earlier one. There is a tension between desire for the precovid schedule of Sunday services, religious education, coffee hour, and gathering in the fellowship hall versus the current scheduled time of services, middle hour, abbreviated coffee time, and activities that preclude fellowship hall gatherings.

While a staff member or volunteer has monitored the chat during online services, we recognize that we have a lot of work to do to improve our online welcoming and tracking online attendees.

We asked the Safe Building and Congregation Team to assess our historical and current church safety provisions as they relate to ushering and greeting:

- We lack written policies or procedures; the church does not have written safety policies and procedures to respond to fire, weather, medical emergencies, or hostile intruders or threats.
- Building access is a concern; we have no managed entry to the building. Keys have been issued with no record keeping, and we have no return-key policies.
- Training is needed: the church does not have a team of volunteers who could respond to fire, weather, medical emergencies, or threats by hostile intruders. In addition, no regular evacuation or shelter-in-place drills have taught the congregation what to do in case of such events.



## Tactics to Bridge the Gap

To help resolve some of the tension that exists between many congregants' desires for the precovid Sunday morning schedule and the staff's preference for the current schedule, we propose a systemic, intentional, open-minded, forward-looking conversation – including staff and congregants with a variety of needs – about the best practices related to the scheduled time for services, the plans for middle hour, the importance of and location of coffee hour, and the use of the fellowship hall, breezeway, and the courtyard on Sunday mornings. Until this discussion can occur, we will work within the current system.

### Welcoming

The *Guide for Welcoming and Integrating Newcomers* suggests a number of worthwhile tactics that we can adapt for our congregation:

- Post a greeter near the parking lot to welcome guests and show them where to enter. An usher can be available with an umbrella, wheelchair, or other help for those with accessibility challenges as they maneuver the parking lot and into the sanctuary.
- Have greeters volunteer at tables with UU literature, the Member Resource Book, and other specific information about the church. The *Guide* suggests having “Visitor Packets” that include:
  - a brief history of the church;
  - literature about activities within the church (Branches, Social Justice team, book groups, etc.) and outside of the church (TBR, Holy Grill, etc.); and
  - wallet cards listing our principles and sources.

Until the host and greeter corps is in place, we have set up a Membership Team Table. We have two volunteers to staff the table. We make copies of the Member Resource Book available and will update it annually. We have also filled the brochure racks.

- We could add a basket in the bathrooms with a few band-aids, feminine products, safety pins, diapers, and baby wipes.
- Offer amplification devices for persons hard of hearing and who do not own hearing aids. Our church has added a *public T-coil system* in the sanctuary that works with four available hearing devices and all hearing aids that are equipped for the technology. We need to ensure the Welcoming Team–Greeters, Ushers,

and Hosts—know where they are and how to use them, and that the treehouse volunteers make sure they're charged and working.

- A welcoming icebreaker could be for a greeter to ask what brought the guest to the church.
- Develop a method to track attendance of on-line and in-person guests, members, and friends. The colored name-tags are an interim step to help us identify those who want to be recognized as guests. A name-tag system that could be used to track in-person attendance should be considered.

## **Hospitality**

For more welcoming after-service gatherings, the team suggests:

- During fair weather, the patio area could be used as a gathering place, with some benches moved close to one another to encourage conversation and others set apart for those who may prefer a quieter space.
- An overhead structure, canopy/sail, or trellis that would create some shade could encourage use of this attractive space, with the advantages gathering in outside spaces holds for many.
- QR codes displayed at the tables would provide a quick link to a website that describes the work of the Team, upcoming meetings and events, and how to contact the Team Leaders. Laptops would be set up, so that guests could peruse the UCBR website, sign up to receive weekly emails, and become familiar with how to navigate the website.
- Hosts could use the laptops to show guests how to live stream services, view them on the church's YouTube site, or how to use Zoom to participate in church activities, such as Branches or other meetings.
- White boards or monitors with information announcing meetings and gatherings would be prominently displayed and kept updated.
- Hosts, and possibly other Welcoming Team members, would be available to invite and guide guests and newcomers as they explore the information on display or on the website. They could guide guests on tours of the religious education classrooms.
- Hosts would receive training along with other Welcoming Team members and would look for ways to ensure the entire church community is adept at using welcoming and relationship-building best practices that demonstrate our commitment to promoting equity, inclusion, and diversity, and working to dismantle racism and other oppressions. The many tools, articles, and audio transcripts available on the UUA website, such as [Stopping Harm Flyer \(PDF\)](#) and Greeter Tip Cards, will be resources. The After Service Fellowship part of the [Secret Seeker Assessment Form](#) could be used to identify and implement best practices and to regularly assess our performance. Additional ongoing transformative experiences that would make hosts and greeters to be truly

welcoming could be supplemented with monthly reflection and discernment groups.

- Hosts would participate in follow-up phone calls to find out: Did we meet your expectations? What might we provide you on your next visit? Were you able to meet members, ministers, or team leaders during the after-service gathering? Were you invited to lunch?
- Hosts would be recruited to reflect our commitment to building a diverse multicultural Beloved Community. Ideally guests and newcomers can expect to be met and be welcomed by people like themselves. Hosts would follow a rotating schedule such that returning guests and newcomers are likely to see a familiar face among the Hosts.
- An invitation to after-service gatherings would be included on the church website and appropriate social media. Including a map of the parking lot and church layout would provide guests an opportunity to contact us by email, texts, or phone prior to or on arrival, if they will need any assistance. Information about our sound systems' compatibility with T-coil hearing aids would be included, along with the availability of hearing devices. We can provide parking assistance, a helping hand, an umbrella, a wheelchair, or a walker. Keeping a record of requests for assistance would enable us to plan ahead with staffing and resources to meet the needs of our guests, newcomers, and members.

## **Ushers**

A host or an additional greeter/guardian per service would allow two people to be at the welcome table while a third offers assistance to people with special needs or serves as a relay in case additional help is needed at the parking lot site.

A tablet or laptop at the welcome table would allow ushers to monitor the streamed services.

They could also keep an eye out for safety **during** the service. We've asked an usher to sit in the vestibule for this purpose, but this hasn't been enforced. In any case, during the offering and counting, the ushers cannot perform this function.

Finally, the hosts and greeters can fulfill the crucial role of engaging newcomers in conversation after the service since the ushers are busy counting the money.

## **Safety**

The Safe Building and Congregation Team is working on achieving all best safety practices. It has secured a grant to install a controlled entry system and plans to install security cameras. The Team is completing a draft Emergency Procedures Manual.

Estimates and approvals for the entry system and cameras are underway. Training in CPR/First Aid is being arranged. The Safe Building and Congregation Team is also contracting with a safety expert to develop training protocols and to help recruit volunteers for the Team. Training for ushers, greeters, worship staff, RE teachers, etc. on safety procedures is planned. Church-wide drills will be conducted.

The Safe Building and Congregation Team is kicking off a church-wide communications plan during May and June of 2023. The Membership Team particularly requests development of a means for ushers to instantly communicate potentially dangerous situations to someone inside the sanctuary, preferably the person in the Treehouse.

## **Assign Responsibility**

### **Ushering and Safety**

David Lindenfeld will work on tactics for the usher corps, and will co-lead a team that will include Betty Powers and another member to administer the usher preparation and oversight. Although the Safe Building and Congregation Team led by Melanie Mayeaux is responsible for achieving the best practices listed above, developing a culture of safety that is shared by the entire church is also a major goal.

### **Greeting and Hospitality**

Suzanne Besse will work with Nancy Grush, Donna Yelverton, Dottie Kelly, and other members of the Welcoming Team to develop the system of Hosts and Greeters.

Bonnie Brown will continue to prepare coffee for the After-Service gatherings on Sundays; however, she does so prior to the services and does not attend the gatherings. Suzanne will continue to bring snacks, set up the coffee and tea, and oversee clean-up, as we recruit additional volunteers and transition into a more shared ministry. She will also continue to welcome guests and newcomers, including introducing them to others.

Donna Yelverton and Dottie Kelly will staff the Membership Table during the interim while other tactics are being planned and implemented.

## **Timeline**

### **Welcoming and Greeting**

To facilitate the friendliest and most welcoming Sunday morning experience, we will work with the Board, ministers, staff, and congregants to discern and develop the best schedule for services and classes, and the best design and use of indoor and outdoor spaces. Ideally, this work would be done as part of strategic and capital fund drive

planning.

We have stocked the racks in the narthex with pamphlets that reflect our hospitality and multiculturalism and will replenish them as needed.

We will staff a Membership Table until the Host/Greeter System is in place.

We will add a third person to the two-usher teams by the third quarter of 2023.

We will begin following up with visitors (beyond the staff's welcoming email) by early 2024.

### **Hospitality**

Creating a workable timeline is a collaborative effort with other Welcoming Team and Membership Plan efforts. To ensure that guests see people like themselves at our church, we propose to recruit and train by early 2025 a fully staffed team of multigenerational, gender expansive, and multicultural Hosts committed to demonstrating our church's commitment to inclusion and dismantling of racial and other forms of oppression.

Meanwhile, we will focus on expanding the hospitality coffee crew, building the skills of our usher corps, increasing the number of greeters, and enhancing the functionality of the Membership Table.

### **Safety**

The Safe Building and Congregation Team anticipates completing a draft Emergency Procedures Manual by the end of March 2023 that will be rolled out to the congregation in May and June of 2023.

Work will proceed on the entry system when estimates are received and approved. All work must be completed by June 2023.

Training in CPR/First Aid will begin in the Summer of 2023.

Also in Spring of 2023, the Safe Building and Congregation Team will contract with a safety expert to develop training protocols and to help recruit volunteers for the team.

Training for ushers, greeters, worship staff, RE teachers, etc. on safety procedures will also begin in the Summer of 2023. Churchwide drills will be conducted.

# Member Engagement & Retention

## Introduction

This section addresses and integrates several interdependent topics: the path to membership; engaging and retaining members and friends, family ministry, membership classes, and tracking membership demographics and metrics.

## Vision or Desired State

We have a clear path to membership for those who wish to join. We are growing numerically and in diversity, inclusion, anti-oppression and accessibility. Our welcoming process supports that growth and encourages friends and guests who are fourteen or older to become members of our church.<sup>26</sup> We develop and maintain connections to all of the adults, children and youth who are part of our church community by providing accessible and meaningful worship, proactive caring, well designed programming, social justice discussion and action, small group ministry, and other opportunities for connection and growth. Community members rarely leave unless they move or die. Those who leave for other reasons know they will be welcomed back when they choose to reconnect.

We have identified, recommended, and assisted with implementation of measurements that are most appropriate and feasible for our church, including progress toward achieving our commitment to diversity, inclusion, anti-oppression, and accessibility. We track attendance and membership demographics and measure the success of our tactics.

We envision a family ministry culture that engages children, youth, and young, middle & senior adults:

- In which families, youth, and children are integral to the life of the church
- With a volunteer structure that supports the envisioned culture
- With practices that directly welcome families, youth, and children into membership and involvement with all areas of the church – worship, social justice, community life, faith formation – as well as practices that directly serve each cohort

---

<sup>26</sup> The bylaws currently specify the minimum age for opting into membership. We recommend that the Board address whether the bylaws should be amended to provide that all children of members are automatically members unless or until they opt-out. See Appendix A.

We envision a team of volunteers working on scheduling, publicizing, and implementing a curriculum of classes to engage the membership, as well as recruiting and training facilitators, thus providing:

- Information and welcoming sessions for guests and seekers
- Classes to teach new members about our church and our faith
- New (and existing) members opportunities to join a vibrant small group ministry program
- Ongoing classes for members to grow in knowledge and understanding of Unitarian Universalism

## **History and Status Quo**

Although various volunteers and staff members have had responsibility for individual components, we have not had a comprehensive plan for member engagement and retention.

Until about five years ago, we assumed that those interested in membership would meet with a minister, attend Roots class, fill out a new member card, and be voted into membership by the Board. New member welcome ceremonies were held periodically.

The ministerial transitions since 2019 and the pandemic resulted in a void in the member engagement process. From 2019 through year-end 2022, we had no consistent process in place to accept, welcome, orient, or celebrate our new members. Generally people interested in joining obtained a new member card from a minister, volunteer, or a staff person. Staff processed the new member cards, the board voted monthly on admissions, and various new member orientation classes were held at various times, mostly during the middle hour.

Once someone submits a new member card, no formal system is in place to welcome them or orient them. They receive no official notification about what comes next or how to engage in the work of the church.

We do not have a formal process for tracking attendance or for identifying virtual attendees. We are in the process of identifying the membership measurements we have been tracking and the methods of obtaining them, as well as their dissemination and use within the church.

The membership orientation and spirituality building classes are under the direction of the Director of Family Ministries. In the past, the church held a class titled “Roots” for visitors and seekers, which was an introduction to the church and to Unitarian Universalism led by the ministers. It ran as a multi-week course on weekday evenings for many years. As attendance patterns changed, Roots was adapted to run as a Saturday workshop or a shortened set of weekday evening classes. Attendance patterns continued to fluctuate and Roots classes were discontinued during the ministerial transitions and pandemic responses. In 2022, the Senior Minister and

Director of Family Ministries created a draft plan for a series of classes for new (and existing) members, with the expectation that they would run during Middle Hour (10:15-11:15 on Sunday mornings):

- o An introduction to Unitarian Universalism
- o An introduction to Branches, our small group ministry program
- o A way of integrating previous spiritual and religious experiences into one's current faith
- o An introduction to the church's work in anti-racism and anti-oppression
- o An introduction to stewardship and leadership

In the summer and fall of 2022, the Director of Family Ministries adapted a UUA curriculum from Tapestry of Faith to create "What Does It Mean To Be UU?" and wrote a curriculum to introduce Branches ("Branches Sampler Sessions"). These classes have run once (so far); the other three have not yet been put into place.

The Director of Family Ministries also provided the history of other classes and programs associated with member engagement and retention, noting that the church's programming for children and youth was formerly seen as separate from a membership program or track. That is, the church's focus in religious education for children and youth was primarily to provide religious education classes for children and youth, including *Our Whole Lives*, and to involve the parents in the church by asking them to serve within the religious education program as teachers, facilitators, religious education committee members, etc. With the shift in emphasis to family ministry rather than exclusively religious education, beginning with the hiring of a Director of Family Ministries rather than a Director of Religious Education, that approach has evolved. However, changes in both attendance patterns (both pre- and post- acute pandemic times) and in the ways people of all ages are engaging with programming mean that we are building or rebuilding volunteer support structures within the church for doing family ministry well.

Following the transition of religious education to Family Ministries and the addition of our Minister of Congregational Life, the church is in the process of assigning staff responsibility for various types of adult programming. Beginning this year, much of the responsibility for member engagement and retention is being transitioned to the Membership Team under the direction of the Minister of Congregational Life.

In January 2023, the Membership Team held a welcome ceremony for everyone who had joined the church since the last ceremony was held in 2019. We assembled packets that included a welcome letter, a Member Resource Book<sup>27</sup>, Branches

---

<sup>27</sup> The *Member Resource Book* describes the various committees, ministry teams, and other ways to get involved with the church. It was first published by the Membership Team in late 2022 for the 2022 - 2023 Board year and will be updated each new board year.



information, a Time and Talents Card, and a chalice pin. It also included stewardship information for those who had not already pledged.

We began building and orienting our hospitality teams and stocked the brochure racks in the narthex with information about the church and the denomination. We have begun staffing a membership table before and after services to assist members and prospective members with forms, information, and answers to their questions about the church.

## **Tactics to Bridge the Gap**

- Implement the Path to Membership – from visiting, to joining, to receiving a welcoming packet, to attending an orientation class, to participating in a new member ceremony, and becoming integrated and engaged in the mission of the church.
  - Applicant (currently those fourteen or older<sup>28</sup>) obtains a membership card at the Membership Table on Sunday morning or requests a membership card from the Congregational Administrator (see the Contact section of our website [unitarianchurchbr.com](http://unitarianchurchbr.com) for email, street address and phone number).
  - Applicant fills out the membership card, signs it and returns to the Membership Table on Sunday morning or mails it to the Congregational Administrator.
  - The Congregational Administrator sends a photocopy of the membership card to the Secretary of the Board of Trustees.
  - The Congregational Administrator acknowledges receipt of the membership card to the applicant and provides the applicant with a list of next steps and when to expect notice of the Board's vote to welcome the applicant (with language provided by the membership team).
  - The Secretary of the Board of Trustees includes the names of the membership applicants in the Board agenda for the next Board Meeting and makes copies of the membership cards available to Board members at that meeting. The agenda packet is copied to the Congregational Administrator, Archivist, and Membership Team leader.
  - The Board welcomes the applicant to membership in the Unitarian Church of Baton Rouge. The welcome is documented in the Board minutes.
  - The Board Secretary immediately notifies the Congregational Administrator of the welcoming of the member applicants listed on the agenda.

---

<sup>28</sup> We recommend considering whether children of members automatically become members rather than having to opt-in at age fourteen. See Appendix A.

- The Congregational Administrator files the card with a note stating the date of the Board's welcoming and enters the new member information into Breeze.
- The Congregational Administrator sends a new member packet via U.S. mail. The packet notifies the membership applicants of the Board welcome and dates of the next orientation class. It encourages the new member to attend the class and to join a Branches group. The team will decide on other components for the packet.
- A minister arranges a conversation with the new member unless a previous conversation has occurred.
- We invite the new members to the next membership recognition ceremony, which we currently anticipate will be held semi-annually in January and July.
- Conduct member type segmentation and assign a team member for each category, including a focus on children and youth:
  - Guests – work with the hospitality subteam to establish and maintain contact with repeat visitors and guests, with attention to our commitment to diversity, inclusion, anti-oppression and accessibility.
  - New members – define a way to facilitate their forming connections to the church, with attention to our commitment to diversity, inclusion, anti-oppression and accessibility.
  - Established members – Offer opportunities to be involved, considering their passions, age and demographics, with attention to our commitment to diversity, inclusion, anti-oppression and accessibility.
  - Friends and non-joiners – We acknowledge that some people who get involved in regular activities may view themselves as committed to our church and subject to expectations of membership, even though they do not choose to become members.
- The Director of Family Ministries is working to involve lay leaders in several areas of family ministry programs serving:
  - Young children
  - Elementary age children
  - Youth
  - Young adults
  - Adults (education and home ministry)
  - Elders (education and home ministry)
  - With focus on the following areas:
    - Spiritual growth and development
    - Education and learning
    - Social community and bonding

- Home ministry (how do we support the family in living out Unitarian Universalism outside of Sunday mornings and outside of church)
- As these components coalesce, the Director of Family Ministries anticipates working with the membership team to actively engage folks of all ages. She suggests these tactics whereby the Membership Team can assist in this evolving area of growth:
  - Welcoming materials explicitly for our guests who are children or teens at the greeters' table
  - A guide for families on how to engage with the church community
  - A Membership Team member who is particularly focused on the needs of children, youth, and families
  - Increased support for families, youth, and children in participation in worship, social justice, community life, and faith formation
- The tactics with which the Membership Team will assist, and that are provided by the Director of Family Ministries for developing and delivering classes to engage the membership include:
  - Recruit volunteer(s) to form the team
  - Continue to locate or write curricula
  - Formalize a schedule and rotation of classes
- The Membership Team will support members in becoming involved in activities that are meaningful to them and strengthen their connection to the church, with attention to our commitment to diversity, inclusion, anti-oppression and accessibility.
- The Membership Team will work with staff to determine the programming that will help us to accomplish our goals and assist in planning the programming. This would include our Branches small group ministry program, classes for children, youth and adults, and bringing in speakers.
- The Membership Team will work with staff to determine and facilitate the types of social activities that strengthen connections to the church.
- We will review tactics and assess our level of success periodically.
- We will share new tactics or plans with the Board, ministers, staff and involved volunteers, collect input, revise and obtain appropriate approval.
- We note that further information is required before we can fully develop our tactics. The following questions have not yet been completely explored or

answered. We will conduct interviews with leaders and staff and ministers, hold group discussions, and use surveys to answer open questions, with the answers being collected and reviewed and the results reported.

- Is our guest welcoming process for adults, children, and youth sufficient and what more do we need to do for virtual worshippers?
- Does our welcoming process support growth and our commitments to diversity, inclusion, anti-oppression and accessibility?
- Are we maintaining sufficient contact with guests and new members, including children and youth?
- How do we engage established members and friends and connect them with worship, classes, Branches groups, and activities?
- How many members do we have, and what percentage are engaged? Does our level of engagement reflect our commitment to diversity, inclusion, anti-oppression and accessibility? Does our level of engagement support growth?
- How do we engage children and youth?
- How do we engage young adults? (18 – 24 and 25 – 30 or 35?)
- How do we engage people who pledged in 2022 and not 2023, but still live in BR?
- How do we engage people who participated before the pandemic but are not participating in any way now?
- How do we encourage diversity among guests, members, children and youth, and how do we measure advancement in diversity?
- How do we engage friends and non-joiners?

## **Responsibility**

Diana Dorroh will recruit and arrange training for a sub-team of the Membership Team to oversee caring for members and friends and to review and update this plan as needed.

Primary responsibility for Family Ministries falls to Kathy Smith, supported by a team of yet-to-be-identified volunteer lay leaders and working with the Membership Team.

## **Timeline**

June 2023 – Put the Path to Membership in place.

July 2023 – Hold a new member ceremony.

By August 2023 – Support the Director of Family Ministries in holding the next sessions of “What Does it Mean to be UU?” and “Branches Sampler Sessions.”

August 2023 – Recruit and form the Member Engagement and Retention subteam.

September 2023 – The Director of Family Ministries and Membership Team will create a plan for information/welcoming sessions (how frequent, when schedule, what to include).

By the end of the Fall of 2023, the Director of Family Ministries will finalize plans for and deliver the remaining three classes.

October 2023 – Complete implementation of the specific tactics requested by the Director of Family Ministries.

November 2023 – Complete member type segmentation and assign a subteam member for each.

January 2024 – Hold a new member ceremony.

First Quarter of 2024 – Answer the questions identified in the tactics.

March 2024 to March 2025 – Deliver and implement the Membership Tracking and Demographics

April 2024 to March 2025 – Complete implementation of the additional specific tactics for Membership Engagement and Retention.

July 2024 – Family Ministries hopes to have their tactics underway with Membership Team support.

July 2024 and January 2025 – Hold new member ceremonies.

March 2026 – Review and update subteam composition and leadership and update plan as necessary.

# Volunteer Coordination and Volunteer Leader Resources

## **Our vision**

We imagine a day when our church is full of volunteers whose stories of life change are so contagious, we never have to awkwardly beg people to help. Imagine we're surrounded by a zero recruitment culture where volunteers have the support they need, feel empowered to perform their roles, have a strong sense of community, and are experiencing significance and meaning. Imagine an indescribable buzz in the hallways, a sense of anticipation. Imagine our church as a magnet for new, highly motivated volunteers, and that we have created a system that develops leaders and plans for succession.

## **Our current culture**

Our board oversees three committees, and they seem to function well. Members of the independent committees can appear to be at loose ends, as the reporting structure and operational systems can be unclear. Our ministry teams are composed of teams of volunteers who generally work with lay chairpersons and co-chairs. Each team reports to a staff member or minister. We note that Adult Faith Formation is still being organized, and information will be added to this plan when available. The current organization is reflected in Appendix B. An organization chart will be added once it is developed.

In August 2022, stewardship consultant Mark Ewert found that our church has “[m]ature and thoughtful lay leaders.” We note that volunteer teams are generally led by and staffed with a group of long-time members, mostly older women. Team leaders often have to do their own recruiting with little information about newer and/or younger members who might be available and appropriate for jobs or tasks. While we have been collecting skills, talents, and interests for new members, we have limited information for the rest of the congregation. What does exist is manually entered into a spreadsheet by a volunteer and not well known or accessed by other leaders.

Each team leader is generally on her own – responsible for procedures, orientation, education, communications, document creation and retention, celebrations, and transitioning the team to her replacement. Leaders usually must employ their own technology skills and equipment to accomplish those tasks. While our religious education and Branches volunteers receive guidance and mentoring from our Director of Family Ministry, they could also benefit from an improved volunteer support system. We also perceive a need for more communication and sharing about the UUA General Assembly delegate selection process.

The needs of the volunteers must be considered as high a priority as the needs of the staff — needs for information, involvement, recognition, and resources.

## **Bridging the gap**

We need to foster a new mindset that values volunteers over programs, as volunteers are a nonrenewable resource. Retention must take priority over recruitment. We must help our volunteer leaders stop focusing on recruiting and start retaining volunteers by creating an irresistible volunteer culture. Our goal is to provide such a rewarding volunteer experience that volunteers invite their friends to join them. Rather than spending time trying to think of who to call to beg to fill an urgent volunteer gap, we envision receiving requests to be allowed to serve. The time we now spend making pleas for new and replacement volunteers could be spent supporting and celebrating the ones we have.

An excellent source for ideas to build the support system for our volunteers is an outgrowth of The Volunteer Project called *Stop Recruiting Start Retaining* by Darren Kizer, Christine Kreisher, and Steph Whitaker. The book proposes that we choose to stop recruiting (except for new ministry programs, of course) and begin to focus on making volunteer retention our passion. Valuing our volunteers will create a culture that makes retention easier and attracts additional volunteers. Our focus should be on: a mindset of excellence; a clear, easily understood mission statement; an attitude of gratitude toward those who donate their time; and a welcoming culture.

Our strategy for building the support system includes:

- Celebrate the significance of volunteers;
- Provide first-class support;
- Fuel meaningful connections; and
- Empower their passions.

Tactics include:

- The Membership Team chair will establish on the membership team a volunteer coordinator whose job it is to provide leaders with the tools, resources, and connections needed to staff, encourage, educate, support, and celebrate their volunteers.
- The coordinator will establish a network of volunteer leaders to share information, suggest training, help with recruiting, and help build relationships and celebrate volunteers.
- Updating the Breeze database to include the skills and interests of members, as well as a record of their other volunteer positions, and keep it up-to-date and readily available to team leaders.
- Building training curricula and other resources for volunteer leaders and team members.

- Monitoring church communications, board meetings, output of staff meetings, and UUA and UUAMP resources and sharing information that could benefit ministry teams.
- Celebrating volunteers at least annually.

Our proposed timeline (assuming the needed Breeze enhancements will have been made) includes:

- Begin gathering updated talent and interest information immediately.
- Create and staff the volunteer coordinator position by the end of the third quarter 2023.
- Build the leader network by mid-2023 to facilitate communications and information sharing.
- Begin in June 2023 to make the Breeze enhancements available to team leaders.
- Hold our first volunteer appreciation ceremony in the first quarter 2024 and facilitate quarterly relationship building huddles.



# Leadership Development

## Vision and Best Practices

Leadership Development (LD) is a set of activities that prepare current and future leaders to perform effectively in their roles. Every leader has basic skills such as healthy communication, systems thinking, spiritual grounding and an understanding of conflict, with further training depending on role and setting. Training for one focus is helpful for other leadership positions. Skills building intentionally involves an effort to create a diverse community of leaders.

### Vision

- Find leaders with a commitment to our mission.
- Develop leaders who practice preemptive radical inclusion and work effectively toward the goal of creating a place of belonging and positive transformation.

### Best practices for Leadership Development

- Create a clear but flexible path to leadership.
- Identify (including self-identification), invite, include, and nurture the full spectrum of individuals interested in becoming servant leaders.
- Support and celebrate those presently in leadership.
- Recognize the diversity of individuals, leadership styles and the multiple skills involved in leadership. Identify and develop paths for potential leaders.
- Understand that some people will move in both directions on the spectrum of membership and leadership.

## Status Quo

- The church has had no formal plan for leadership development. In the past some individuals have attended the Dwight Brown Leadership Development courses.

## Tactics

- Since we have had no formal plan in the past there are multiple gaps to fill. However, many of those gaps are addressed in this membership document, if not explicitly (e.g. refer to the areas of broadening the definition of membership, building a hospitable and engaged culture, preemptive radical hospitality, and anti-oppression, multiculturalism and accessibility.) Also, our ministers, staff and congregation are learning to practice shared ministry. To do that we all need the skills of leadership.
- It is important to have a well communicated path both to self-identify and to take a break from or postpone leadership.

- Leadership Development should be done in a way that maximizes team building and collaboration as well as a commitment to accessibility and equity.
1. Do an analysis of
    - What programs have we tried in the past?
    - What is missing and what is presently available?
    - Do we have the time and resources (including funding) available?
    - What is the level of interest?
  2. Identify potential leaders:
    - Individuals who engage in the work of diversity and social justice, spiritual growth and education all show themselves to be potential leaders.
    - Work with existing teams, groups, committees, and Branches groups to seek out, identify, and encourage potential leaders.
  3. Resources
    - The talents card, Breeze data and other specific projects will dovetail well with Leadership Development.

## **Responsibility**

- Create a LD team (Holley Haymaker, others being recruited)
- Create more formally articulated collaboration with the Nomination Committee and Adult education

## **Timeline**

- Early June 2023 – Identify co-leader.
- June 2023 – Choose individuals to attend General Assembly workshops on leadership development.
- By September 2023 – The staff clarifies who should be the primary person involved in this process and the associated staff role definitions.
- October 2023 – The Membership Team, Nominating Committee and appropriate staff clarify role definition.
- Fall of 2023 – Provide input to the budgeting process.
- First quarter 2024 – Begin identification of leadership candidates and start building development plans.
- Other possible options without dates:
  - Include leadership development in the classes for senior youth and for adults.
  - Request that the Southern Region train a group here in Baton Rouge. (Include other leaders in south Louisiana. Timing would depend on their availability.)

## Breeze Church Management System

### **Vision and Best Practices**

Our vision for Breeze CMS is that it would provide staff and volunteer leaders a comprehensive way to collect and access needed congregant and team member information. Team leaders could communicate with team members, and create, manage, retain, and hand off team documents. They would be able to monitor people, manage events and track donations. They could also manage databases, create groups, send and schedule email and text messages, offer online and text message giving, generate contribution reports, set up event registration and manage event volunteers, securely check-in children and print name tags, print member directories, and more. We could improve the accuracy of pledge statements, as Breeze integrates with QuickBooks for accounting management. It can also sync contact and group data with MailChimp.

### **History and Status Quo**

The church used Servantkeeper church management software (CMS) until a few years ago when we migrated to Breeze. The CMS has primarily been used by the ministers and staff, and mainly as a directory for people's contact information and for manually recording pledges and contributions. In general, volunteer leaders can access only directory printouts from the database that are posted on the member section of the website and that may be several months old.

In 2022, the generosity team leader had access to the database to manually record pledges and track pledges received. A few teams use some of the communications features. Generally, team leaders keep their own records on their own computers, which causes concerns when leadership transitions or when documents need to be retained or accessed by others. During the Spring of 2023, the Congregational Administrator activated additional functionality.

### **Tactics to Close the Gap**

One of the Membership Team priorities is to improve support for volunteer leaders. To get from our current state to our vision, we propose to provide access to Breeze features as needed:

- Customizable People Profiles with member access and fields for volunteer positions held and talents and interests
- Email to team members
- SMS Text Messages to group members
- Follow Ups
- Name Tag Printing & Customization (for certain volunteer groups or events)

- Volunteer Management
- Event Management
- Event Registration
- Tracking attendance
- Printable Directories (by teams, by geographic location, up to the whole congregation)
- MailChimp Integration
- The caring teams (CCT, PCA, Disaster Response) could share information.
- The generosity team could use Breeze to:
  - Track Giving
  - For Online donations (via a donate button on each person's profile)
  - Text Giving
  - Contribution Reports
  - Giving Statements
- Forms Creation
- A single place for creating church documents by team or committee and a churchwide filing and document retention system

## **Responsibility and Timeline**

Allison Hall is the database administrator. Donna Yelverton and the Membership Team IT consultant will work with her to develop the priority and timeline for evaluating and implementing the enhancements.

Basic Breeze Training for volunteer leaders will be provided in a series of six Saturday sessions during the summer of 2023. It will be expanded to other congregants beginning in the fall.

## Appendix A

# Foundational Prerequisites

The Membership Team requests that Church leaders consider that several necessary programs and foundational components of our governance and ministry are outside of the Team's purview and should be affirmed, evaluated and updated, or newly established. They include:

- A statement of core **values** - What is at our core? Why do we exist?
  - During 2019, the board and congregants embraced "Love, Connect, Transform" as our "holy why."
  - Are these our core values? If not, what should replace them?
    - Preemptive Radical Hospitality?
    - Preemptive Radical Inclusion?
    - Anti-oppression Focus?
    - Total Accessibility?
    - Relationship is Everything?
- A congregational **covenant** - How will we work in relationship to bring those values into the world? How will we be with and behave toward one another? What do we promise to one another and to the congregation as a whole?
  - We say our church is covenantal, not creedal. We need a covenant.
  - We understand the congregation attempted about fifteen years ago to adopt a behavioral covenant. Since then, the following covenant by James Vila Blake, while never officially adopted, has been a part of worship and used in leadership meetings. We believe it needs to be updated or replaced to reflect the spirit of this Plan.

Love is the spirit of this church and service its law. This is our great covenant: to dwell together in peace; to seek the truth in love; and to help one another.

- We understand that the Healthy Congregation Committee is charged with facilitating the development of a covenant. We include here the promises that are related to membership that we recommend be considered:
  - To honor our diversity as a source of communal strength;
  - To fight oppression of all who face marginalization
  - To serve the mission of this church with passion and commitment;

- To extend preemptive radical hospitality to all seekers and joyfully welcome our guests;
  - To share our time, talents, and resources generously;
  - To remember that relationships are everything and to communicate with kindness and support;
- An updated **Mission Statement** - What are we here to do? What is our work? We need a concise statement of the congregation's core purpose. What do we want to be known as or known for within the wider world? Why must we exist?
  - Our mission statement has not been updated in over twenty-five years.
  - It reads: "Grounded in love and respect for nature and humanity and dedicated to the individual search for truth, we provide a home where we can celebrate spiritual diversity and commit ourselves to serving the human community."
  - Does this statement answer the question that Dan Hotchkiss, the author of *Governance and Ministry*, says it must: "Whose lives do we intend to change and in what way?"
  - Here is a sample of the points we would like to see considered for an updated **mission statement**:
    - To build a beloved sustainable *community of communities*
      - that welcomes seekers, guests, members, and friends;
      - that prioritizes relationships;
      - that ensures equity, justice, and respect for all people;
      - that emphasizes anti-oppression work and reconciliation with historically marginalized people
      - while also promoting stewardship of our climate and natural resources.
- Our congregational **vision** – What do we want to be? What will our world look like when we achieve our mission?
  - We need a carefully defined picture of where the church wants to be in 2026. The vision is our dream of what the congregation can become in alignment with our mission in the world. Hotchkiss states, "A congregation that limits its vision to pleasing its members falls short of its true purpose. Growth, expanding budgets, building programs, and such trappings of success matter only if they reflect the positive transformation in the lives of the people touched by the congregation's work."
  - A **sample vision** statement could be: "The Unitarian Church of Baton Rouge is radically inclusive and practices anti-oppression while showing up for social and climate justice so that Baton Rouge may be healed."

- **Our Five Expectations of Membership** are:

- Worship together
- Be generous
- Be in covenant
- Be open to transformation
- Make the world a better place.

To these five, we suggest adding a sixth: “**Welcome everyone.**”

The Membership Team also acknowledges our responsibilities as to other important **sources of influence and direction**: the Board’s Annual Visions of Ministry for the next three years; Outcomes from the Accelerating Multiculturalism Congregational Research Project; and the UUA’s Article II Revision work.

- The Board’s **Annual Vision of Ministry**, which sets the annual priorities for the church charged our ministry team leader with developing this plan. The 2022-2023 AVOM is:
  1. Continue our deep commitment to racial reconciliation and work towards full implementation of the 8th principle.
  2. Grow our understanding of shared ministry to strengthen our beloved community through better communication and developing a membership plan.
  3. Create a culture that develops and fosters involvement, generosity, and engagement.<sup>29</sup>
- The ***Accelerating Multiculturalism Congregational Research Project***:
  - Since the Fall of 2022, seven church members have been participating in a study to explore how the UUA and other UU organizations might support and encourage congregations who aspire to help bring about the Beloved Community by taking meaningful steps to meet the needs of people from cultures and life stages that have been underserved. These steps involve intentionally meeting the needs of people beyond those already present, centering the ideas and leadership of people who have been underserved, and adopting a culture of continuous experimentation and learning.
  - Reverend Brock Leach, who is undertaking the study for his doctoral dissertation, identified the Unitarian Church of Baton Rouge as one of the congregations committed to this work. The study team, composed of Jackie Blaney, Jeff Gauger, Ann Mengelson-Clark, Maida Owens, Bobby Thompson, and Donna Yelverton has held discussions about what the

---

<sup>29</sup> We note that in addition to delivering the plan, the membership team is involved in promoting racial reconciliation, shared ministry, and generous engagement.

journey could look like, what challenges we might face, and what we could do to overcome them. This work, being conducted under the auspices of Boston University's Institutional Review Board, will also influence and accelerate our Membership Plan and its implementation.

- The resulting prototype will create a system of support (tools, resources, encouragement, and incentives) to help us and other congregations accelerate our journey toward multiculturalism. This beloved mosaic of cohorts of congregations will journey toward a multicultural and multi-generational future and a goal of spiritually vital congregations that reflect our Unitarian Universalist vision.
  - Because the essential components of the mosaic are still being fully developed and socialized, the Membership Team has not specifically incorporated the components into this plan. Reverend Leach has agreed that we should not wait for a denomination-wide program before we move forward with the approach to welcoming and belonging described in this plan. He suggested that we might begin by proactively identifying the communities and programs in which new people would be most welcome and would be given room to bring their ideas and leadership, so that existing members greet them with open arms.
  - We will follow the course of this work and include ultimate recommendations in future updates of this plan.
- The UUA's **Article II Revision**: The current Principles and Sources are perceived to have inadequacies that demand rewriting. In a process called renewal or regeneration, the revised Article II values centered on love are being considered by the 2023 General Assembly and will be voted on in 2024.

**Finally, the Team anticipates the need for board, staff, and congregation-wide discernment of the questions presented in Part II involving our branding strategy and a possible bylaws amendment.**

- Branding strategy:
  - Find the right name for our organization
  - Develop a logo
  - Develop a theme line/tag line
  - Develop a font and color scheme that will be consistently used for all of our marketing
  - Will we become the Unitarian Universalist Church of Baton Rouge and adopt the UUA logo, branding, and communications style manual? (Doing so seems to fit with the spirit of this plan.)
- Consider amending the bylaws to provide that all children of members are automatically members unless or until they opt-out. Apply the age restriction only for voting.



# Appendix B

## Membership Team Overview

To fulfill our charge and to accomplish the development, implementation, and maintenance of this plan, we propose to develop the Membership Team as follows.

### Mission

The mission of the Membership Team is to support the mission of the Unitarian Church of Baton Rouge by educating members and influencing or instituting systems to reach out to curious seekers, and helping make the church welcoming to people of all cultures, races, ethnicities, sexual preferences, gender identities, ages, socioeconomic backgrounds, formal education levels, physical and mental abilities, and communities.

### Vision

The Unitarian Church of Baton Rouge is a dynamic, diverse community of communities that is welcoming to curious seekers and sufficiently attentive to the needs of guests, friends, and members to sustainably fund and carry out its mission.

### Membership Team Covenant

As members of the Unitarian Church of Baton Rouge Membership Team, we commit ourselves to the mission of the church and agree to remain faithful to it as we work to develop and implement a cradle-to-grave path to belonging and engagement.

- We promise to be good stewards of our resources and care for the long-term well-being of our beloved community.
- We commit ourselves to building trust among our team members and with seekers, guests, friends, members, volunteers, lay leaders, ministers, and staff — through clear communication, transparent processes, and responsible and compassionate action.
- We seek to involve all member communities of the congregation, hear their diverse voices, and encourage the welcoming spirit of everyone, while maintaining any necessary confidentiality.
- We will listen to conflicting opinions with open hearts and minds. We will seek to achieve consensus and speak with one voice.
- We strive to remain joyful and passionate about welcoming and belonging, while seeking to bring discipline, authenticity, and flexibility to our work.

- We are united in our optimism and committed to helping one another and offering our service to the church in the spirit of love.

### Assumptions

As the Membership Team develops and implements this plan, we begin with the following assumptions:

- The Board of Trustees has charged the Ministry Team Leader with publishing a Membership Plan by May 31, 2023. Thus, we assume that we have the ministers' support for developing the ministry of membership programming.
- The chair will fulfill the role of volunteer membership professional and will work under the direction of the Minister of Congregational Life and with the staff and the membership ministry team.
- The volunteer membership professional will require support for growth through on-the-job training, continuing education and leadership development, and will work to budget sufficient funds for these efforts.
- The volunteer membership professional will serve until the congregation can employ a fairly compensated professional staff member, either full-time or part-time.
- The membership team will work closely with Family Ministry and with Adult Faith Development, once the program is established.
- The church will enhance the Breeze database as needed to support member and volunteer needs.
- A high quality membership program will be an essential factor in congregational numerical, maturational and associational growth.

### Scope of our Work

The Membership Team helps ensure the sustainability of the church by caring for people from cradle to grave by:

- Embracing children and families of members
- Attracting and welcoming guests
- Formulating a pathway to belonging for all
- Building shared ministry through communication and by facilitating volunteerism and lay leadership

The team works with ministers and staff, governance, other ministry teams, members, and other constituencies to maximize the faith spectrum experience for members' newborn children through young adulthood, and for curious seekers to welcome guests and friends, then on to becoming new members, engaged members, passionate volunteers, volunteer leaders, wise counselors, and through dying, death, and memorializing their lives.

Membership team functions include:

- Marketing (attracting curious seekers), outreach, and communications
- Welcoming guests, ushering, and extending hospitality to all
- Following up with guests
- Welcoming and orienting new members by celebrating their joining and by integrating them into congregational life, stewardship, branches small ministry groups, and ministry team volunteer work
- Promoting fun events to build relationships among congregants
- Recruiting volunteers and supporting and developing volunteer leaders
- Focusing on retention of members and friends
- Tracking and analyzing membership data
- Supporting enhancement of the Breeze membership database

The team will also:

- Coordinate with:
  - Congregational Strategic Planning
  - Nominating Committee
  - Communications Team
  - Outreach Director
  - Family Ministry and Religious Education
  - Church Safety Team
  - Social Justice Team
  - Congregational Care, Pastoral Care, and Disaster Response Teams
- Research membership best practices and incorporate them into congregational life
- Build professional capabilities, including membership in UUAMP (the Unitarian Universalist Association of Membership Professionals) and considering earning membership and professional certification for appropriate volunteers or staff
- Regularly update this Membership Plan

## Team Organization

**Chair:** Donna Yelverton

**Co-Chair:**

- **Membership Planning, and Strategic Planning Interface:** Rev. Chris Long and Donna Yelverton
- **Marketing, Outreach, and Communications:** Pennie Nichols (in concert with the Communications Team) and Denise Crowe will co-lead
- **Hospitality, Greeting, Welcoming, Ushering, and Safety:**
  - Hospitality and Greeters – Nancy Grush and Suzanne Besse and Dottie Kelly

- Ushers – David Lindenfeld and Betty Powers
- Church Safety – Melanie Mayeaux
- **Member engagement and retention**
  - Joining; Engagement; Family Ministry; Branches; Small Group Ministry; Member retention (young adults 18-25; adults 25-35; middle adults; seniors; legacy members); Friends or non-joiners (Diana Dorroh)
  - Membership classes (Kathy Smith)
  - Involving children and youth (Kathy Smith)
  - Relationship building events will be coordinated with Family Ministry and the Generosity Team (need photographers)
- **Caring for Volunteers:** Donna Yelverton
- **Developing Leaders:** Holley Haymaker and Nominating Committee
- **Breeze database enhancement and administrative support:** Allison Hall with consulting from Austin Guidry

## **Role Definition**

### **Membership Team Chair**

#### **Team Leadership:**

- Recruit members and provide them with resources needed to do their jobs.
- Publish and update the Membership Plan.
- Publish and update the Member Resource Book.
- Monitor the board meeting agendas and minutes to keep the members abreast of plans and activities that affect membership.
- Interface with the Strategic Planning Committee and other committees and ministry teams to facilitate communications.

#### **Welcoming Guests:**

- Greet and welcome guests at services.
- Develop the guest/membership brochure.
- With Family Ministry, publicize, coordinate, and evaluate guest programs.
- Oversee process of caring for guests.

#### **Pathway to Belonging:**

- Formulate membership program goals.
- Create a welcoming and nurturing environment.
- Design membership program.
- Publicize membership program.
- Encourage membership engagement.
- Evaluate the membership program.

## **Volunteer Coordination**

- Recruit volunteers.
- Orient volunteers.
- Provide ongoing support for volunteers and volunteer leaders.
- Create volunteer appreciation programming.

## **Program Administration**

- Oversee coordination of marketing, communication, public relations, advertising, and publicity.
- Ensure that guests are acknowledged with a phone call or email after their first visit and oversee the process that cares for returning guests.
- Oversee the process that encourages and cares for new members.
- Work with the Congregational Administrator to enhance and maintain the membership database.
- Maintain the budget for the Membership Team.
- Meet regularly with the Minister of Congregational Life to maintain communications with ministry staff and obtain feedback from staff.

## **Professional Growth and Continuing Education**

- Reading and reflection of membership resources.
- Succession planning: find a young person or new member who is passionate about membership work to serve as co-chair and eventually take over the chairperson role.
- UUAMP continuing education programming.
- UUAMP annual Professional Day.
- Participate in regional/national UUAMP conferences.

## **Membership Team Members**

**Purpose of the Position:** Help all who enter the church, especially guests and new members, to feel welcome and help them get integrated into the community through developing and implementing the path to belonging.

**Responsibilities:** Listed below are tasks that the Membership Team does throughout the year under the direction of the chairperson. Each team member chooses the areas about which they are most passionate:

- Greet guests at services: Reach out to welcome guests and answer any questions that they might have. One team member organizes the scheduling of members who serve as greeters. Others help send out thank-you notes, serve as greeters, and help recruit new greeters.

- Weekly guest phone calls: Church growth experts report that contact with guests within the first 48 hours of their visit is ideal. (An outline for the conversation will be provided.)
- Help with Introductory classes: Evaluate and recommend introductory classes or curriculum. Quarterly, or as needed, work with the Director of Family Ministry to plan, publicize, and execute guest and new member classes. Participate in classes as needed and help with logistics.
- Help with New Member Celebrations: Semiannually, work with the ministers or worship guild on new member ceremonies. Plan celebrations, such as receptions, brunches, suppers or lunches. Help with set-up, and participate and interact with the new members.
- Connect with new members on a regular basis: Regular contact with new members helps them connect with the community. Contact new members by phone approximately three months, six months, and one year after they join. (An outline for the conversation will be provided.)
- Miscellaneous other tasks including:
  - arranging for and displaying new member photos
  - writing anniversary cards to members
  - writing welcome cards to new members
  - attending monthly membership team meetings

### **Qualifications**

- All are welcome to be part of the team.
- Especially helpful are recent guests and new members who can give a fresh perspective on how the Church is accomplishing our goal of being a welcoming community.
- Especially needed are extroverts who can circulate as hosts to welcome everyone.

### **Amount of Time Required**

- Hospitality volunteers, such as greeters, ushers, and refreshment providers, are asked to help at one service a month. Those who are willing can serve as greeters for all services they attend. The rest of the tasks vary and usually can be fitted into busy schedules. Most of the work is done around services or in the evenings or other available times. Meetings are held monthly and last for 1½ hours.

### **Length of Commitment**

- We ask members to make a one-year commitment that can be renewed indefinitely.

### **Training and Support Provided**

- The Membership Team chair will work on spiritual skills building training and retreats.

- The chair is available to meet individually as needed to communicate about the committee and the areas of involvement members have chosen.
- Monthly meetings also provide time for questions and feedback.
- Team members are responsible to the Membership Team Chair and the Minister of Congregational Life.

# Appendix C

## Organization

Until an organization chart is developed, the Membership Team will work with the staff and the following volunteer groups:

### **Board of Trustees**

**Finance Committee**

**Governance Committee**

**Personnel Committee**

### **Independent Committees**

**Healthy Congregation**

**Nominating**

### **Worship-Related Teams**

**Worship Guild**

**Treehouse Team**

**Choir**

**Sunday Support Team** (which this Plan moves to Hospitality under the Membership Team)

**Ushers/Welcomers Team** (which this Plan moves to Hospitality under the Membership Team)

**Branches** small group ministry (which may be part of Family Ministry or Congregational Life)

### **Family Ministry**

**Adult Classes**

**Classes for Children and Youth**

**Home Ministry for Families**

**OWL** sexuality education

**Multi and Intergenerational Programming**

### **Community**

**Outreach**

**Social Justice**

### **Caring Groups**

**Pastoral Care**

**Congregational Care**



**Disaster Response****Serving the Congregation****Communications****Buildings and Grounds****Archives****Safety****Membership****Hospitality****Hosts****Greeters****Ushers****Safety (with Safe Church Team)****Outreach, Marketing & Communications****Member Engagement and Retention****Volunteer Coordination and Volunteer Leader Resources****Leadership Development (with Nominating Committee & staff)****Breeze (with staff)****Generosity****Annual Budget Drive****Fundraising****Education/Community Events****Legacy Giving****Endowment****Affinity Groups****Black Joy Collective****Fun and Fellowship****Women's Book Club****Open Circle Book Club****Sixth Source Sharing Circle****Retirement Support Group****The Cakes Group**