

# HOSTING GUIDE



**FOR THE**

**PLANNING FOR GROWTH AND VITALITY  
Weekend Workshop  
FOR THE SMALLER MID-SIZE CONGREGATION**

New Congregation and Growth Resources  
Unitarian Universalist Association  
November 2005

# **ORGANIZING AND HOSTING A WEEKEND WORKSHOP IN YOUR DISTRICT, CLUSTER, OR METRO AREA**

**A Guide for District Offices, District Extension Committees,  
and Host Teams or Host Congregations**

**This document is available on the web at [www.uua.org/cde/education/](http://www.uua.org/cde/education/)**

Updated: November 2005



Members of congregations can contact their district offices to indicate interest in arranging a workshop.

## How to contact New Congregation and Growth Resources

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# STRENGTHENING AND EXTENDING UNITARIAN UNIVERSALISM

The training programs of the New Congregation and Growth Resources Office aim to “strengthen and extend” Unitarian Universalism, in the words of the Unitarian Universalist Association’s (UUA’s) Principles and Purposes. Our focus is to assist congregations in becoming more vibrant and vital centers of faith and to help them lead change in a healthy way. In addition to serving the needs of individual congregations, these training programs are intended to foster an Association of Congregations within a district, cluster, or metropolitan area and to support strategic goals for congregational growth and vitality in the district.

The analogy of the congregation and its community as a “forest” provides some guiding images and perspectives for our Growth and Vitality work for congregations and their leadership. The following passage is from *Deeply Woven Roots: Improving the Quality of Life in Your Community* by Gary Gunderson (Minneapolis: Fortress Press, 1997):

*I have thought of a congregation and its surrounding community as a forest, an image that leads us into the future in two ways. First, we can see ourselves as one of the trees, taking comfort in the complex richness of our enduring connections. Second, we can see ourselves as foresters, with the humble patience of stewards who measure their contribution in terms of decades, nurturing and defending a living process.*

*Although a forest may span miles, any one tree has to grow where it happened to sprout, hoping to bear the fruit it can. ... Some are more resilient than others; some keep growing even after they are knocked down. But the big difference is whom they grow next to, whose roots tangle with their own.*

*A forest’s resilience reflects diversity. Any one tree relies not just on its own roots but on an interwoven fabric of roots.*

Our Association of Congregations is such a forest. In collaboration with district offices and district growth committees, we seek to provide opportunities for teams from congregations in a district, cluster, or metro area to learn together and interweave with each other. Through these workshops, congregations can both give and receive insights from each other and build relationships with other congregations in their district.

The weekend workshop is one dimension of a continuous process of reflecting on current experiences, gaining new insights, and acting on those reflections and learning. Consequently, each program includes preworkshop assignments for the congregational team and recommendations for ongoing learning and implementation following the workshop.

It is most helpful if some members of the district growth committee or other representatives from the district attend the weekend workshop. This provides an opportunity both to learn with and about the congregations in your district and to plan for offering ongoing support and resources to congregations following the workshop.

We look forward to collaborating with you in cultivating resilience, vitality, diversity, and “enduring connections” within and among our Unitarian Universalist congregations.

# WEEKEND WORKSHOP FOCUS

The UUA's New Congregation and Growth Resources Office offers the Planning for Growth and Vitality Workshop for the Smaller Mid-Size Congregation (From 151 to 550 members) for teams from a minimum of seven congregations in a district, cluster, or metro area. These workshops are held through a collaborative effort between our office, district offices, and either conference sites or local host congregations.

## PLANNING FOR GROWTH AND VITALITY FOR THE MID-SIZE CONGREGATION

### What Do We Mean by *Smaller Mid-Size* Congregations?

Below are some characteristics of smaller mid-size congregations:

- They have 150 to 350 members.
- It is common for one or more of the following to apply:
  - There is a full-time minister with one or two other professional staff members.
  - The minister cares for most members in times of need and attends most activities, but this demand may be too great because of the size of the membership.
  - Clergy members, religious educator and some key lay leaders conduct most of the worship and lead small group and adult religious education programs.
  - The system for training lay leadership is informal or non-existent.
  - A governing board or council of committee chairs directs much of the day-to-day life of the congregation.
  - Members think they know most people's names, but in fact they may not, and they may not notice if someone new is present at worship services.
  - Congregants are giving mixed messages about the role they want the clergy to play--such as, "Be pastoral, yet lead us into growth."
  - Communication is either informal or too structured according to a hierarchy.
  - A policy and procedures manual exists, or few procedures or policies are written down because "everyone knows."

## **What to Expect**

This program uses a multifaceted approach to help congregations identify current strengths and determine some strategic directions for further growth and vitality. Using a planning method that will help you guide the work with your congregation after the workshop, we focus on the following three growth strategies:

### **1) Building a Mission and Ministry Focus:**

- **Placing one's mission and vision (outward focus) at the core of all congregational activities.**
- **Connecting one's personal ministry with the shared ministry of the congregation.**
- **Developing dynamic, responsive programming that meets the needs of members and reaches out to those in the community.**

### **2) Ensuring Adequate Resources and Ministry Infrastructure:**

- **Creating a strong ministry for membership.**
- **Supporting personal and shared ministry.**
- **Knowing when to add another worship service, and determining its format.**
- **Examine best practices for governance.**
- **Staffing for growth and vitality.**
- **A comprehensive plan and mission-based budgeting.**

### **3) Knowing What It Takes to Make the Change:**

- **Learning how congregations grow and change.**
- **Developing strategies to lead healthy change through adaptive work.**
- **Determining the leader's role as facilitator, advocate and change agent.**

# DISTRICT OFFICE/DISTRICT CONTACT RESPONSIBILITIES

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The following section details the responsibilities of the district office/district contact person in organizing a Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-Size Congregation. To assist in your planning, please also refer to *Countdown to the Workshop—District Planning Tool* (Appendix A), which is an easy-to-use checklist sketched out by month.

## 1. REQUEST A WORKSHOP AT LEAST 6 MONTHS IN ADVANCE OF THE PROGRAM

Please submit a *Weekend Workshop Request Form* (found in Appendix B or on the Web at [www.uua.org/cde/education/mid\\_hostguide.pdf](http://www.uua.org/cde/education/mid_hostguide.pdf)) to the New Congregation and Growth Resources Office at the UUA, 25 Beacon Street, Boston, MA 02108 or Fax at 617-742-0321. We require a minimum of six months to plan a weekend workshop. In actuality, it is best for all of us to begin planning even as far ahead as one year in advance.

## 2. ARRANGE FOR A CONFERENCE CENTER OR A HOST CONGREGATION FOR THE WORKSHOP, AN ON-SITE COORDINATOR AND A REGISTRAR

### a) Select Location/Host/On-site Coordinator

Usually a conference center--or if that's not practical, a UU congregation that can accommodate the expected attendance--hosts the workshop. In the event that a congregation is the host, the district office must make sure there is a coordinator in the host congregation who can arrange for meals, home hospitality, a list of local hotels (with their addresses and phone numbers), and other on-site arrangements.

The Workshop requires a room large enough for the 40 attendees to be able to work with their teams at separate tables. This space must be available from Friday night through Sunday afternoon, including (if held in a congregation) before and after worship on Sunday.

Please refer to the materials in Appendix C, *Host Congregation/On-site Coordinator Responsibilities*, which detail the responsibilities of the host congregation.

Appendix D includes the planning tool *Countdown to the Workshop—Host Congregation's Planning Tool*.

Please ensure that the host congregation/on-site coordinator receives these pages from this *Hosting Guide* well in advance. The *Hosting Guide* is also available electronically at [www.uua.org/cde/education/mid\\_hostguide.pdf](http://www.uua.org/cde/education/mid_hostguide.pdf).

**When a conference center is host:** Some districts make arrangements with a conference center or hotel for these workshops. This arrangement can allow for more collegiality in evening get-togethers and shared informal discussion. In this case, Appendix C in this packet is still relevant. In any case, please pass that section of the packet on to your on-site coordinator.

**When a congregation is host:** Hosting a weekend workshop is a considerable and rewarding responsibility for the host congregation. It is important that expectations be laid out clearly and with ample lead-time (ideally six months in advance). From our experience, the most successful events are those at which the on-site coordinator enlists the help of a team of volunteers from the host congregation.

## b) Select Registrar

Discuss with the on-site coordinator who will fill the role of registrar (you may specify that it be a district staff person or volunteer, or a congregational volunteer). It's easiest if registration forms are sent directly to the registrar. If the registrar is in the host congregation, you may have him or her hold onto the checks (made out to the district) until the event. The deadline for registration is six weeks prior to the actual event. This timing gives on-site people time to arrange meals, plan home hospitality, and take care of other details.

## c) Workshop Schedule

A Planning for Growth and Vitality Weekend Workshop typically begin on Friday at 6:00 p.m. Please plan for participants to arrive by 6:00 p.m. for registration and a light dinner. Also, when meeting in a host congregation, schedule to incorporate the Sunday morning worship service into the workshop events. Although circumstances may require variations in the schedule, it usually is laid out as follows (with meals and breaks slotted in as convenient to the congregation and facilitator):

Friday, 6:00 -- 9:30 p.m.

Saturday, 8:30 a.m. -- 5 p.m.

Sunday, 8:30 a.m. -- 2:30 p.m.

## 3. COLLABORATE WITH ON-SITE COORDINATOR TO SET BUDGET

The cost of this workshop varies depending on what arrangements you make for food and location. Work with the on-site coordinator to establish a budget for the event. Many districts decide to subsidize a part or all of the workshop costs. If the district is not able to subsidize any of the cost, the participants must share the cost equally. Costs include the following:

### a) Food, Location, and Supplies

If a congregation hosts the workshop, costs include food and supplies. If the workshop takes place at a conference center or other site, the cost of the workshop will increase to cover these expenses. Supplies needed for the workshop are listed in this packet as Item 7 in Appendix C, *Host Congregation/On-site Coordinator Responsibilities*.

### b) Training Materials

Include an additional \$15.00 per participant to cover materials provided by our New Congregation and Growth Resources Office (such as, the *Participant Guide*). At least **6 weeks in advance of the workshop**, the district office/district coordinator must tell the administrator of New Congregation and Growth Resources how many copies of the *Participant Guide* are needed. The New Congregation and Growth Resources Office will send the *Participant Guides* directly to the conference center (by arrangement), host congregation or other site, and invoice the district office for them.

### c) UUA Program Fee

The district pays a flat fee of \$1,200.00 made payable to the UUA and sent to the New Congregation and Growth Resources Office to cover approximately one-half of the two consultants' expenses and fee. The district will be invoiced for this cost.

## 4. PROMOTE THE PROGRAM

The district office or a contact person designated by the district office is responsible for publicity and sends it out well in advance of the program to those congregations identified as the focus of the workshop (for example, mid-size congregations, a metro area, cluster, or other grouping).

### a) Publicity

Even before the final brochure is complete, promote the workshop in the district newsletter, at district events, at Unitarian Universalist Ministers Association chapter meetings, on district Web pages, and in the district calendar.

### b) Workshop Brochure and Registration Form

A key part of your publicity plan will be to create a brochure and registration form. See *Sample Content for Brochure: Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-Size Congregation* in Appendix E for a detailed example. Ideally, your brochure/registration form will include the following information:

A deadline date to return registration forms to the registrar **at least six weeks in advance** of the workshop. A strict cutoff date can help ensure adequate numbers and commitment.

Cost of the workshop (as described above).

Clear requirements for participants:

- i) **Plan to attend as a congregational team:** Participants are expected to attend with a team of at least *three to four* people from their congregation. Teams ideally comprise key lay leaders the religious education professional, and the parish minister.
- ii) **Prepare preworkshop assignments:** These workshops require the congregational team to read and to prepare an assignment before the workshop. These assignments, although brief, help the team prepare for the workshop and clarify some of their particular learning goals.
- iii) **Attend the whole program:** Participants are expected to attend from start to finish.

A description of the workshop and workshop goals.

Short biographies of the workshop facilitators. This will be sent from the New Congregation and Growth Resources Office.

The schedule for the workshop program (see page 18, Item 10 in the On-Site Coordinator section).

A list of conference centers, local hotels, addresses, reservation numbers and rates, and (if offered) a way for participants to signup for home hospitality.

Space for registrants to include the following:

- The name and address of their congregation.
- The names of all who are registering from that congregation (at least three to four participants from each congregation, and no more than five).

- The name and address of one of these participants, who will serve as the congregational contact person.
- Dietary, accessibility, and home hospitality requirements, as appropriate.

### c) Final Publicity

Because the deadline date for registering is at least six weeks prior to the event, publicity needs to go out no later than **three months before** the workshop; four months is desirable.

### d) Copies to UUA Office

Please make sure to send copies of all of your publicity and maps/directions to: New Congregation and Growth Resources, UUA, 25 Beacon St., Boston, MA 02108 and to the facilitators of your workshop.

## 5. REGISTRATION PROCESS

### a) Encourage Participation

As the deadline for registration approaches, if response is low, you may want to follow up with congregations who would benefit from attending but have not yet registered. As registration trickles in, notice whether ministers are planning to attend with the congregational teams, if not, you may want to follow up with these ministers to encourage their attendance. Also, encourage members of the district extension committee/district growth committee and other key district leaders to attend.

### b) Report Registration

Immediately after the registration deadline has passed, provide the number of registered participants to the New Congregation and Growth Resources Office, which indicates the number of *Participant Guides* that will be sent. **Please note** if fewer than 7 congregations/25 people are registered six weeks before the event, the workshop may be canceled. Please plan on limiting your workshop to approximately ten congregations /forty participants.

Provide to the on-site coordinator the total number of attendees and congregations registered to attend. Also list any special needs and home hospitality requirements.

### c) Confirm Attendance and Send Preworkshop Assignments

At least **five weeks in advance** of the workshop, send a letter to each registered individual for whom you have an e-mail address (see Appendix F, *Sample Letter: Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-size Congregation —Important Information before You Arrive*, and *Preworkshop Assignments for the Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-Size Congregation*):

- Confirm that each person is registered for the event, and include more details about it, as required.
- Confirm special requests/home hospitality availability for anyone requesting it.
- Send preworkshop reading and assignments. The assignments, entitled *Pre-Workshop Assignments for the Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-size Congregation*, are available electronically at [www.uua.org/cde/education/mid\\_preworkshop.pdf](http://www.uua.org/cde/education/mid_preworkshop.pdf) or by mail for people who cannot access them electronically.

## **6. FOLLOW-UP AFTER THE WEEKEND**

### **a) Set up Alumni E-Mail Group**

- i) We encourage districts to set up workshop alumni groups following the weekend.
- ii) Post the list of key knowledge and experience gained that was generated on the last day of the workshop with the entire group.
- iii) Invite teams to share progress of action plans developed during the weekend.
- iv) Periodically “tickle” the e-mail list by posting useful information, inviting teams to share their progress, or both.

### **b) Submit Check to UUA**

The UUA will invoice the district to cover the costs of producing and mailing the copies of the *Participant Guide* and the \$1,200.00 flat fee (\$600.00 is approximately one-half of the cost of one consultant).

### **c) Submit Check to Conference Center or Host Congregation**

Pay the conference center its fee plus any food and rooming charges. If the workshop was held at a host congregation, reimburse the host congregation for workshop-related food and supply expenses.

# Countdown to the Workshop—District Planning Tool

*This is intended as a planning tool to help organize a weekend workshop. For complete details, refer to the body of the Hosting Guide.*

<b>SCHEDULED DATES FOR WORKSHOP:</b> _____	<b>date</b>
<p><b>UUA CONTACT</b>            Susanna Whitman, Administrator            New Congregation &amp; Growth Resources Office            Unitarian Universalist Association            25 Beacon Street, Boston, MA 02108</p> <p>Phone: 617-948-4270 Fax: 617-742-0321            E-mail: <a href="mailto:swhitman@uua.org">swhitman@uua.org</a></p> <p><b>Workshop Facilitator</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p> <p><b>District Contact</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p>	<p><b>Host Congregation or Conference Center</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p> <p><b>On-site Coordinator</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p> <p><b>Other Contact Information</b>            _____            _____            _____            _____            _____            _____</p>
<b>SIX MONTHS BEFORE THE WORKSHOP</b> _____	<b>date</b>
<p><b>Request Workshop</b></p> <p><input type="checkbox"/> Submit a <i>Weekend Workshop Request Form</i> (available as Appendix B in the <i>Hosting Guide</i> and also online at <a href="http://www.uua.org/cde/education/mid_hostguide.pdf">www.uua.org/cde/education/mid_hostguide.pdf</a>) to this address:</p> <p style="margin-left: 40px;">Administrator, New Congregation and Growth Resources            UUA, 25 Beacon Street, Boston, MA 02108,            or Fax at 617-742-0321 or e-mail to <a href="mailto:swhitman@uua.org">swhitman@uua.org</a></p> <p><b>Identify and Support District Contact, Host Congregation, and On-site Coordinator</b></p> <p><input type="checkbox"/> Identify the district contact person.</p> <p><input type="checkbox"/> Locate a host congregation/center with adequate space (a room, available Friday night – Sunday afternoon, fitting 10 tables for congregational teams) that is able to host a workshop.</p> <p><input type="checkbox"/> Provide host congregation with Host Congregation/ On-site Coordinator Responsibilities, available in Appendix C of the <i>Hosting Guide</i> and also online at <a href="http://www.uua.org/cde/education/mid_hostguide.pdf">www.uua.org/cde/education/mid_hostguide.pdf</a>.</p>	

**FIVE MONTHS BEFORE THE WORKSHOP****date****Communicate With On-site Coordinator**

- Check in to see how planning is going and to support/coach as required.

**Collaborate with On-site Coordinator to Set budget**

- Develop a budget for meals/snacks/supplies with the on-site coordinator (registration fee to cover food, supplies, and copies of the *Participant Guide*).
- Determine who is responsible for providing supplies (easels, markers, name tags, masking tape, a chalice, a CD player, an overhead projector, and any other equipment needed).

**Promote Program: Publicity**

- Promote the event in the district newsletter, at district events, on district Web pages, and in the district calendar.

**FOUR MONTHS BEFORE THE WORKSHOP****date****Identify Registrar**

- Arrange with the on-site coordinator who will act as registrar. (It may be a district staff person or volunteer, or a congregational volunteer.) We've found it easiest if registration forms and checks are sent directly to this person.
- Finalize the registration fee.

**Prepare Publicity**

- Create promotional materials, brochures, and registration forms (clearly describe program, and state expectations for teams--for example, a minimum of three participants).
- Send the draft to the on-site coordinator and to the facilitator to confirm the accuracy of the information.

**Encourage Participation**

- Encourage the members of the district extension committee and other district leaders to attend.

**THREE MONTHS BEFORE THE WORKSHOP****date****Send Out Brochures and Publicity**

- Finalize and send promotional materials to congregations in the target area. Use multiple modes (for example, brochures, e-mail, Web sites, and other useful modes).
- Send one copy of all publicity materials, maps, and directions to:  
Susanna Whitman, Administrator  
New Congregation and Growth Resources  
Unitarian Universalist Association  
25 Beacon St., Boston, MA 02108
- Send one copy each of all publicity materials, maps, and directions to the two workshop facilitators.

**UP TO SIX WEEKS BEFORE THE WORKSHOP \_\_\_\_\_ date**

**Accept Registration Forms**

**Encourage Participation**

- Follow up with congregations who would benefit from attending but have not yet registered.
- Remind members of the district extension committee and other district leaders to attend.

**SIX WEEKS BEFORE THE WORKSHOP \_\_\_\_\_ date**

**Registrar: Contact UUA Office**

- Provide to the UUA's New Congregation and Growth Resources Office the number of people registered for the event/number of copies of the *Participant Guide* required. (FYI: if fewer than seven congregations/twenty-five people have registered, the workshop may be canceled.)

**Registrar: Work Closely with On-site Coordinator**

- Provide to host site or host congregation the total number of attendees/congregations registered (to coordinate food, dietary needs, and rooms or home hospitality).
- Provide contact information for those requiring home hospitality and any other special needs.

**District Contact: Connect with Workshop Facilitator**

- Coordinate how district staff members/representatives might be involved during the weekend (for example, helping facilitate small groups or giving information on the district's services).

**FIVE WEEKS BEFORE THE WORKSHOP \_\_\_\_\_ date**

**Registrar: Send E-mail or Mail to All Registrants**

- Send a letter confirming that they are registered for the event and providing more details. Include in the letter the Web site address for the *Preworkshop Assignments*: [www.uua.org/cde/education/mid\\_preworkshop.pdf](http://www.uua.org/cde/education/mid_preworkshop.pdf).
- Inform individuals who requested home hospitality as to its availability and with whom they will stay.
- Ensure that individuals without e-mail or internet service will receive information by mail, including the *Preworkshop Assignments*. Perhaps ask each congregation's contact person in each group to forward this information, as needed.

**TWO WEEKS BEFORE THE WORKSHOP \_\_\_\_\_ date**

**Receive Participant Guide**

- Check to see that the copies of the *Participant Guide* have been delivered to the host site or congregation. If they have not arrived, contact the national UUA office ASAP!

**DURING THE WEEKEND \_\_\_\_\_ date**

**Work with facilitator and on-site coordinator to ensure a successful weekend.**

**Submit Check to UUA**

**Submit Check to Host Site or Host Congregation to Reimburse Expenses**

**Set Up Alumni E-Mail Group**

- Set-up an e-mail group from the registration list.
- Post the list of key knowledge and experience gained that was generated on the last day of the workshop with the entire group.
- Invite teams to share their progress with action plans developed during the weekend.
- Periodically “tickle” the e-mail list by posting useful information, inviting teams to share their progress, or both.

## WEEKEND WORKSHOP REQUEST FORM

Request From	Location
District: _____  Person making request: _____  District office address: _____ _____ _____  Date of request: _____	<p><i>If known at this time, please let us know the name and location of the conference center or congregation that will host this workshop:</i></p> Site: _____ Street: _____ City/State: _____ Phone: _____ Nearest airport: _____  The Workshop requires a room large enough for the 40 attendees to be able to work with their teams at separate tables. This space must be available from Friday night through Sunday afternoon, including (if held in a congregation) before and after worship on Sunday.  The location does ___/does not ___ meet this minimum space requirement. Please check as appropriate.  <i>You are expected to provide transportation for the workshop facilitator to and from this airport.</i>
Workshop Requested	District Contact Person
<p><i>We request the following workshop for our district, cluster, or metropolitan area (use one form/request):</i></p> <p><input type="checkbox"/> Planning for Growth and Vitality Weekend Workshop for the Small Congregation</p> <p><input type="checkbox"/> Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-size Congregation</p>	<p><i>This person is responsible for overall coordination of the workshop and is the main contact person with both the New Congregation and Growth Resources Office and the on-site coordinator:</i></p> Name: _____ City/State: _____ Phone: _____ E-mail: _____
Preferred Dates and Expected Participation	On-Site Coordinator
<p><i>Our preferred dates for the workshop (please list three, in your order of preference; remember that we require a minimum of six months' notice to plan a weekend workshop):</i></p> 1 <sup>st</sup> choice: _____ 2 <sup>nd</sup> choice: _____ 3 <sup>rd</sup> choice: _____  Anticipated number of congregations: _____ Anticipated number of participants: _____	<p><i>If known at this time, please indicate the on-site coordinator. This person is responsible for coordinating all the on-site requirements:</i></p> Name: _____ City/State: _____ Phone: _____ E-mail: _____

### MAIL, FAX, OR E-MAIL THIS REQUEST TO

Susanna Whitman, Administrator, New Congregation and Growth Resources  
 Unitarian Universalist Association, 25 Beacon St., Boston, MA 02108  
 Fax 617-742-0321, [swhitman@uua.org](mailto:swhitman@uua.org)

# HOST CONGREGATION/ON-SITE COORDINATOR RESPONSIBILITIES

*District Provides This List to Host Congregation/On-site Coordinator Six Months before Event*

Thank you for considering/agreeing to host a Planning for Growth and Vitality Weekend Workshop for the Smaller mid-size Congregation in your congregation. Through your ministry of hospitality, you are helping to promote congregational health and vitality in your District. Hosting one of these workshops also provides an opportunity to feature your congregation to other church leaders from your region. On behalf of the UUA's Office of New Congregation and Growth Resources, your district, and participating congregations, we are grateful for, and indebted to, your generosity and commitment. From previous congregations' experiences, we know that hosting a weekend workshop is both a significant amount of work and very rewarding. May it bring your congregation a sense of pride in your efforts and deeper connection to the broader UU movement.

Responsibilities for the host congregation/on-site coordinator are outlined below and are coordinated with the district office that is sponsoring the weekend workshop. To assist in your planning, please also refer to *Countdown to the Workshop—Host Congregation's Planning Tool* in Appendix D.

## 1. ORGANIZE AN ON-SITE VOLUNTEER TEAM

From our experience the most successful events are those in which the on-site coordinator enlists the help of a team of volunteers to assist with the weekend. Some host congregations go “outside the box” in their planning, for example:

- Involving children/youth to helping to create a welcoming and pleasant atmosphere for the event.
- Planning a special Sunday service for that weekend that optimizes the benefit of the presence of the facilitator and district staff.
- Creating small groups to get together weeks or months before the event to cook food together, which is then frozen for use during the weekend.
- Being ministry centered by reminding volunteers throughout the process that they are not just doing dishes, picking up someone at the airport, or serving food but helping to create more vital and vibrant congregations.

Use your imagination to create a fun and productive team that also meets the following requirements:

- Prepare a budget for the event (in collaboration with the district).
- Provides directions to the church or conference center.
- Coordinates home hospitality.
- Prepares, serves, and cleans up after meals (or contracts with a caterer to do so).
- Provides one or more meeting rooms with adequate seating.
- Purchases or gathers supplies.
- Offers local transportation for the facilitators.
- Staffs the registration table.
- Organizes Saturday evening coffee house/all-congregation event (optional).

## 2. PREPARE A BUDGET FOR THE EVENT

**a) Budget for food and supplies:** The cost of this workshop varies, depending on what arrangements you make for the food and location. Collaborate with the district office early on to develop a budget for the weekend. Finalize this budget at least five months before the event, as the registration fee will be calculated based on the following:

- *Participant Guide* (\$15.00 per person).
- Miscellaneous supplies that need to be purchased (for example, flipchart paper, markers, and stickers—see specific requirements below).
- Food and drink for the weekend (see specific requirements below).

Please keep detailed receipts of all workshop-related expenses, and you will be reimbursed at the end of the weekend. If you require funds up front, please let the district contact person know ASAP.

**b) Other Costs:** For your information, the facilitators' costs are shared by the district and the UUA's New Congregation and Growth Resources Office.

**c) Minimum Registration:** If registration is low (fewer than seven congregations/twenty-five people) after the deadline, the event may be canceled. Please note that it has been our experience that there are often last-minute changes to registration (usually no more than approximately five people).

## 3. PROVIDE DIRECTIONS TO THE CHURCH OR CONFERENCE CENTER

At least five months before the workshop please send the district contact person directions participants coming from your region. They should clearly communicate how to get to the meeting place. If relevant, include a variety of directions from different geographic points.

## 4. SUPPLY ACCOMMODATIONS

**a) Hotels and Bed and Breakfasts (B&Bs):** At least five months before the workshop, the host congregation needs to send a list of names, addresses, and reservation phone numbers of nearby hotels/B&Bs to the district contact person, who is preparing the publicity and registration form for the workshop. Hotels and B&Bs should be moderately priced.

**b) Home Hospitality:** It is helpful if the host congregation provides some home hospitality for participants coming to the workshop who prefer this option. If home hospitality is available, the registration form will indicate that it will be available on a first-come, first-served basis. The registrar (designated by the district) will collaborate with the on-site coordinator to ensure that people are matched with home hospitality spots. The registrar will let participants know at least five weeks in advance whether they will be receiving home hospitality. Usually the face-to-face connection between the hosts and guests is made on Friday evening at 9:30 p.m. (after the evening program is completed). If the host is not able to be present, be sure the participant has clear written directions to get to the home.

## 5. MEALS

The host congregation needs to provide for the following meals and snacks either by arranging with members of their congregation to prepare the food or by contracting with a catering service. As stated above, because the registration fee covers the costs of the food, a budget for these meals and snacks should be shared with the district contact person for the final workshop publicity brochure and registration at least **five months** before the weekend workshop.

Please ensure that there are choices at every meal for vegetarians (in fact, some host congregations decide to “go vegetarian” for the entire weekend). Other meal restrictions may emerge as people send in their registration forms. Here are the breakdowns for meals (times are estimates and may be adjusted slightly):

#### **Friday**

**6:00 - 7:00 p.m.** Light supper (for example, soup or stew, salad, buns, cheese and crackers)

#### **Saturday**

**8:00 - 8:30 a.m.** Continental breakfast (for example, fruit, coffee, tea, juice, bagels or muffins, and other breakfast items)

**10:30 a.m.** Nutritional break (for example, fresh coffee/tea, juice and a light snack)

**12:15 - 1:15 p.m.** Lunch (for example, stew, casserole, soup, salad, whatever is easy for you)

**3:00 p.m.** Nutritional break (for example, fresh coffee/tea, juice and a light snack)

**6:30 p.m.** At a conference center, there is a plan for dinner and a cabaret that includes a fun exercise, enabling greater learning and a refreshing change of pace. At a host church, a Saturday evening event is optional, but highly encouraged. This can be an all-congregation event at which teams get to connect with members/friends of the local congregation (potluck and party, coffeehouse, and/or entertainment). If an event is not offered, participants have supper on their own.

#### **Sunday**

**8:00 - 8:30 a.m.** Continental breakfast (for example, fruit, coffee, tea, juice, bagels or muffins and other breakfast items)

**12:00 - 12:30 p.m.** Light lunch (something easy to eat as this is a quick lunch—for example, sandwiches, veggies and dip, fruit, and cheese and crackers)

## **6. ROOM REQUIREMENTS**

We require one large room that can be used for the entire weekend (including during Sunday morning worship and before and immediately after church on Sunday) and small break-out rooms if possible. The large room must be able to comfortably hold forty people, with ample room to move around and rearrange tables and seats as required. There must be a large amount of wall space to display work (flipchart pages). Also if possible, it's ideal to have a separate room for meals.

## **7. SUPPLIES NEEDED FOR THE WORKSHOP**

The host congregation needs to coordinate with the district office, which provides the following supplies needed for the workshop:

- At least two sturdy easels with newsprint/flipcharts (26" x 32").
- Twelve scent-free markers, or at least one for each congregational team and two (of different but dark colors) for workshop leader.
- One roll of masking tape.
- Poster board, one piece per congregation, in a light color, white, or with pale background design.
- Ten pieces of card stock for table tents to show the name of each congregation.

- Glue sticks.
- Name tags for registrants, color coded by church team.
- Seed packets or flower bulbs, one per person, all in decorative basket.
- A chalice and candle with matches.
- A tape/CD player.
- An overhead projector, or LCD projector, and screen.

## 8. TRANSPORTATION FOR WORKSHOP FACILITATOR

We request that you provide transportation for the facilitator from the airport to the site of the workshop and to and from their hotel/B&B and the site each day. The facilitator will need to visit the site early on Friday to check on the setup.

## 9. REGISTRATION TABLE

When participants arrive on Friday night, someone needs to staff the registration table. Tasks include the following:

- Greeting participants and confirming their registration (double-check the attendees list/ payment/home hospitality requirements).
- Orienting the participants to the meeting space.
- Receiving checks from participants who haven't already paid and registering people who aren't on the list.
- Ensuring correct participant contact information (include e-mail addresses) to produce a contact list for participants to take for postworkshop connections.
- Giving participants workshop materials and inviting them to fill out name tags.

## 10. SCHEDULE FOR THE WEEKEND TRAINING PROGRAM

Please note that our weekend workshops typically begin on Friday evening promptly at 6:00 p.m. Please plan for participants to arrive by 6:00 p.m. to check in and have a light dinner. Also, when meeting in a host church, schedule to incorporate the Sunday morning worship service into the workshop events. Although circumstances may require variations in the schedule, it usually is laid out as follows:

### FRIDAY

6:00 - 7:00 p.m.	Check in and light supper
7:00 - 9:30 p.m.	Program

### SATURDAY

8:00 - 8:30 a.m.	Break fast
8:30 a.m.–12:15 p.m.	Program (break at 10:30)
12:15 - 1:15 p.m.	Lunch
1:15 - 1:30 p.m.	District Presentation (optional)
1:30 - 5:00 p.m.	Program (break at 3:00)
6:30 p.m. - ??	Potluck and all-congregation coffeehouse (optional)

### SUNDAY

8:00 - 8:30 a.m.	Breakfast
8:30 a.m. - 12 Noon	Program
12:00 - 12:30 p.m.	Lunch
12:30 - 2:30 p.m.	Program
2:30 p.m.	Farewells

## COUNTDOWN TO THE WORKSHOP HOST CONGREGATION'S PLANNING TOOL

*This is intended as a planning tool to help organize a weekend. For complete details, refer to the body of the Hosting Guide.*

<b>SCHEDULED DATES FOR WORKSHOP:</b> _____	
<p><b>UUA CONTACT</b>            Susanna Whitman, Administrator            New Congregation &amp; Growth Resources Office            Unitarian Universalist Association            25 Beacon Street, Boston, MA 02108</p> <p>Phone 617-948-4270 Fax 617-742-0321            E-mail <a href="mailto:swhitman@uua.org">swhitman@uua.org</a></p> <p><b>Workshop Facilitator</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p> <p><b>District Contact</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p>	<p><b>Host Congregation or Conference Center</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p> <p><b>On-site Coordinator</b>            Name _____            Address _____            _____            Phone _____ Fax _____            E-mail _____</p> <p><b>Other Contact Information</b>            _____            _____            _____            _____            _____            _____</p>
<b>SIX MONTHS BEFORE THE WORKSHOP</b> _____ <b>date</b>	
<p><b>Volunteer to Host Event</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review the <i>Host Congregation/On-site Coordinator Responsibilities</i> section of the <i>Hosting Guide</i>, also available online at <a href="http://www.uua.org/cde/education/mid_hostguide.pdf">www.uua.org/cde/education/mid_hostguide.pdf</a>.</li> <li><input type="checkbox"/> Have the board review and ratify the decision to host.</li> <li><input type="checkbox"/> Enlist a key volunteer to act as the on-site coordinator. Give him or her the <i>Host Congregation/On-site Coordinator Responsibilities</i> section of the <i>Hosting Guide</i>, also available online at <a href="http://www.uua.org/cde/education/mid_hostguide.pdf">www.uua.org/cde/education/mid_hostguide.pdf</a>.</li> <li><input type="checkbox"/> Share information with district contact person.</li> </ul>	

**FIVE MONTHS TO THE WEEK BEFORE THE WORKSHOP \_\_\_\_\_ date**

**On-site Coordinator Forms a Volunteer Team to:**

- Establish a budget (five months ahead) to enable the fee to be published in publicity materials.
- Purchase and prepare food, or contact caterer to do so.
- Arrange for room and meal set-up, serving, and clean up.
- Purchase and gather supplies.
- Staff the registration table.
- Coordinate home hospitality.
- Offer local transportation for the facilitators.
- Organize a Saturday evening coffeehouse or all-congregation event (optional).

**Collaborate with District Office to Set Budget and Determine Responsibility**

- Develop a budget for meals/snacks/supplies with local volunteers and the district contact person (registration fee to cover food, supplies and copies of the *Participant Guide*).
- Determine who is responsible for providing supplies (easels, markers, name tags, masking tape, a chalice, a CD Player, an overhead projector, and any other supplies).

**Send Accommodation and Location Information to District**

- Provide complete contact information for nearby moderately priced hotels and B&Bs.
- Send clear directions for locating the church or conference center.

**SIX WEEKS BEFORE THE WORKSHOP \_\_\_\_\_ date**

**Receive Final Numbers to Carry Out Plan**

- Receive final number of individuals/teams who are registered for the event. It has been our experience that final numbers may change by about five people. FYI: if numbers show fewer than seven congregations/twenty-five people, the workshop may be canceled.
- Match home hospitality hosts with guests.

**TWO WEEKS BEFORE THE WORKSHOP \_\_\_\_\_ date**

**Receive *Participant Guides***

- Check to see that copies of the *Participant Guide* have been delivered to your congregation. If they haven't, let the district contact person know ASAP.

**DURING THE WEEKEND \_\_\_\_\_ date**

**Staff the Registration/Welcome Table**

**Provide Meals/Snacks for Participants**

**Provide Home Hospitality for Designated Participants**

**Supply Space and Materials for Event**

**Ensure That Local Folks Are Present to Help Lock Up, Interpret How Building Works, and Provide On-Site Help.**

# SAMPLE CONTENT FOR BROCHURE: PLANNING FOR GROWTH AND VITALITY WEEKEND WORKSHOP FOR THE SMALLER MID-SIZE CONGREGATION

## LOCATION, DATE, AND CONTACT INFORMATION

### WHAT'S THIS WORKSHOP ABOUT?

This is an opportunity to learn some specific turnaround and growth strategies for smaller mid-size congregations. We use a team approach throughout the workshop. Each team develops an action plan for growth and vitality based on its insights from the workshop and directly building on the strengths of its congregation.

### WHO SHOULD ATTEND?

Smaller mid-size congregations (150 to 350 members) in \_\_\_\_\_ (*insert district/area/cluster*) \_\_\_\_\_ are invited to attend. To determine if this workshop is right for your congregation, consider a few common characteristics of smaller mid-size congregations:

- They have 150 to 350 members.
- It is common for one or more of the following characteristics to be present:
  - There is a full-time minister with one or two other professional staff members.
  - The minister cares for most members in times of need and attends most activities, but this demand may be too great because of the size of membership.
  - Clergy members, religious educators, and some key lay leaders conduct most of the worship and lead small group and adult religious education programs.
  - The system for training lay leaders is informal or nonexistent.
  - A governing board or council of committee chairs directs much of the day-to-day life of the congregation.
  - Members think they know most people's names, but in fact they might not, and may not notice if someone new is present at worship services.
  - Congregants are giving mixed messages about the role they want the clergy to play--such as, "Be pastoral, yet lead us into growth."
  - Communication is either informal or too structured according to a hierarchy.
  - A policy and procedures manual exists, or few procedures or policies are written down because "everyone knows."

If this sounds like your congregation, we hope you'll consider attending. Ideally, participating congregations will agree to send a team of four leaders to the workshop (teams should be no smaller than three members). We have room for a maximum of ten teams; priority will be given to those who register first.

Choose your team with care! Include key lay leaders who represent significant segments of the congregation (for example, the board, religious education, membership, social responsibility, worship, and so on). It is highly recommended that the religious educator and parish minister attend as part of the team. At least a couple of your team members should have good communication skills, as much important work happens when your team returns home to share what it has learned with your congregation.

### HOW WILL YOU BENEFIT?

This program uses a multifaceted approach to help congregations identify current strengths and determine some strategic directions for further growth and vitality. Using a planning method that will help you guide your work with your congregation after the workshop, we focus on the following three growth strategies:

#### 1) Building a Mission and Ministry Focus:

- Placing one's mission and vision (outward focus) at the core of all congregational activities.
- Connecting one's personal ministry with the shared ministry of the congregation.
- Developing dynamic, responsive programming that meets the needs of members and helps the congregation reach out to the community.

## 2) Ensuring Adequate Resources and Ministry Infrastructure:

- Creating a strong ministry for membership.
- Supporting personal and shared ministry.
- Knowing when to add another worship service and determining its format.
- Examining the best practices for governance.
- Staffing for growth and vitality.
- Using a comprehensive plan and mission-based budgeting.

## 3) Knowing What It Takes to Make the Change:

- Learning how congregations grow and change.
- Developing strategies to lead healthy change through adaptive work.
- Developing the leader's role as facilitator, advocate and change agent.

### TIMING AND EXPECTATIONS

Registration, a warm welcome, and a light meal will be provided at 6:00 p.m. on Friday \_\_\_\_\_ (*insert exact date*). The program starts promptly at 7:00 p.m.

The weekend requires a significant commitment of time and energy. Participants are expected to attend the workshop from 6:00 to 9:30 p.m. on Friday, 8:30 a.m. to 5:00 p.m. on Saturday, and 8:30 a.m. to 2:30 p.m. on Sunday. (On Saturday evening there may be a dinner and cabaret, which forms a fun and useful part of the program. If the event is held at a host church, there may be an optional all-fellowship event.) **If you can't attend the entire weekend, please consider not registering.** All team members with e-mail addresses will receive preworkshop materials and exercises a month before the workshop. Please copy the materials for those on your team without e-mail and complete the exercises before you arrive.

### WORKSHOP FACILITATORS

This workshop will be led by \_\_\_\_\_ (*insert information provided by the UUA's New Congregation and Growth Resources Office*).

### WORKSHOP SPONSORS

The \_\_\_\_\_ District, in collaboration with the UUA's New Congregation and Growth Resources Office, is sponsoring this weekend. We thank \_\_\_\_\_ for graciously hosting us in their conference site/congregation for the weekend and coordinating the on-site requirements.

### COSTS

There is a single registration fee of \$\_\_\_ for teams of four or \$\_\_\_/person for teams of three. This fee covers the costs of food, accommodation (if not at a church), and materials for participants. Please make checks out to \_\_\_\_\_. The District and UUA's New Congregation and Growth Resources Office share expenses related to the facilitator.

**Register by** \_\_\_\_\_ (*insert date six weeks before the event*).

Please send registration (form on back) to: \_\_\_\_\_ (*insert name and address of registrar*).

It's fine to send in your registration by e-mail and then follow it up with the check.

### QUESTIONS?

For registration questions, please contact the registrar, \_\_\_\_\_ (*insert name and contact information*).

For specific questions about the workshop, please contact the facilitators, \_\_\_\_\_.

### GETTING THERE

The \_\_\_\_\_ Conference Center/ UU Church is located at \_\_\_\_\_ (*offer written directions and a map*).

### WHERE TO STAY?

(*If held at a church*) Home hospitality is available on a first-come, first-served basis. Please be sure to check off "home hospitality" on the registration form if required, and be sure to register by \_\_\_\_\_ at the very latest!

You may wish to stay at a local hotel or B&B (paying for your own costs). If this is your preference, please book your accommodations well in advance to ensure availability. Some possibilities include: \_\_\_\_\_ (*list hotels & B&Bs*).

**REGISTRATION FORM — PLANNING FOR GROWTH AND VITALITY WEEKEND WORKSHOP FOR THE SMALLER MID-SIZE CONGREGATION — DATE**

COMPLETE AND RETURN BY \_\_\_\_\_ (DATE)

TO: REGISTRAR'S NAME/ADDRESS \_\_\_\_\_ OR VIA E-MAIL \_\_\_\_\_

Fees: \$\_\_\_/team of four or \$\_\_\_/person. Check payable to: \_\_\_\_\_

NAME OF CONFERENCE CENTER/CONGREGATION \_\_\_\_\_

Attendees (put team contact person in #1)

1. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_

E-mail \_\_\_\_\_  
 Vegetarian  Home Hospitality Special Needs \_\_\_\_\_

2. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_

E-mail \_\_\_\_\_  
 Vegetarian  Home Hospitality Special Needs \_\_\_\_\_

3. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_

E-mail \_\_\_\_\_  
 Vegetarian  Home Hospitality Special Needs \_\_\_\_\_

4. Name \_\_\_\_\_  
Address \_\_\_\_\_  
Phone \_\_\_\_\_

E-mail \_\_\_\_\_  
 Vegetarian  Home Hospitality Special Needs \_\_\_\_\_

## SAMPLE LETTER: PLANNING FOR GROWTH AND VITALITY WEEKEND WORKSHOP FOR THE SMALLER MID-SIZE CONGREGATION—IMPORTANT INFORMATION BEFORE YOU ARRIVE

### 1. SO GLAD YOU'LL BE COMING!

We are delighted to hear that you will be attending the upcoming Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-size Congregation on \_\_\_\_\_ (*insert date*) at \_\_\_\_\_ (*insert location*).

### 2. PLEASE FORWARD THIS INFORMATION TO THE FOLLOWING PEOPLE:

We do not have e-mail addresses for the following people. If they are on your team, *please* print out this information and pass it on to them. Thank you!

*(Insert names of people for whom you don't have e-mail addresses.)*

### 3. PURPOSE OF THE WORKSHOP

This weekend workshop will highlight some of the key areas for growing vital religious communities. We hope to stimulate your passion and equip you with basic tools and resources so that you can return to your congregation to nurture change. This workshop is just the beginning—we hope you will go home to your congregation to educate, motivate, and support people to work together to promote growth and vitality.

### 4. LAYOUT FOR THE WEEKEND

Below is the draft schedule for the weekend. You will receive a final agenda during the opening session of the workshop.

#### FRIDAY, \_\_\_\_\_, 200\_\_

6:00-7:00 p.m. Registration and light supper  
7:00-9:30 p.m. Program

#### SATURDAY, \_\_\_\_\_, 200\_\_

8:00-8:30 a.m. Breakfast  
8:30 a.m.-12:15 p.m. Program  
12:15-1:15 p.m. Lunch discussions  
1:15-1:30 p.m. District presentation (optional)  
1:30-5:00 p.m. Program  
6:30 p.m.-?? Dinner and cabaret OR  
all-congregation coffeehouse

#### SUNDAY, \_\_\_\_\_, 200\_\_

8:00-8:30 a.m. Breakfast  
8:30 a.m.-Noon Program  
12:00-12:30 p.m. Lunch  
12:30-2:30 p.m. Program  
2:30 p.m. Farewells

### 5. PARTICIPANTS AND SPECIAL REQUIREMENTS

Below is the list of participants identifying special requests (hh = home hospitality; ns = non-smoking; v= vegetarian; a = wheelchair and/or other accessibility needs, please specify these; or other requirements). If this list is inaccurate in any way, please let our registrar, \_\_\_\_\_ (*insert name*) know ASAP!

*(Insert here a list of names with special requests.)*

## **6. BEFORE YOU COME, READ A FEW PAGES**

The following “getting started” activities are online at [www.uua.org/cde/education/mid\\_preworkshop.pdf](http://www.uua.org/cde/education/mid_preworkshop.pdf). Please read them before you arrive. Please contact the district office for a copy if you are unable to download this file.

1. Four Types of Growth
2. Dynamics of Growth
3. Church Characteristics by Size
4. Board and Congregational Governance
5. Items to Bring for the Workshop
6. Telling Your Congregation’s Story—What Is Your Congregation Like?

## **7. BEFORE YOU COME, COMPLETE THE SURVEY “TELLING YOUR CONGREGATION’S STORY – WHAT IS YOUR CONGREGATION LIKE?”**

Please have your team complete the “Telling Your Congregation’s Story” survey (enclosed) before you arrive on Friday night. On Friday night your team will be invited to share some of the highlights of the survey with other teams as a “getting to know you” exercise. We will also display the surveys for other participants to see.

## **8. PLEASE BRING RESOURCES FOR INFORMATION AND RESOURCES EXCHANGE**

We invite you to bring twelve copies (*one copy for each congregation attending plus one*) of congregational pamphlets, orders of service, great ideas to share with the other teams. (Great ideas might include innovative programming for adults, youth, and/or children; creative solutions to problems; social justice efforts; and other successes in your church’s life.) Bring copies of your congregation’s vision/mission statements (if you have them); we’ll exchange them with one another. Also, bring books and other resources your congregation finds most useful; we’ll have a display table to inspire one another. For a full list of what to bring please refer to section 5 “Items to Bring for the Workshop” in the *PreWorkshop Assignments for the Planning for Growth and Vitality Weekend Workshop for the Smaller Mid-size Congregation*.

## **9. SHARE YOUR TALENTS—SATURDAY EVENING CABARET OR COFFEEHOUSE!**

We hope that there will be either of the following:

Dinner and cabaret, during which a fun exercise that covers some of the workshop material can be done,

OR

If the workshop is held in a host congregation, an all-congregation coffeehouse on Saturday night. Please consider sharing a story, song, poem, dance, performance piece, or whatever with other people during the coffeehouse.

**WE LOOK FORWARD TO SEEING YOU IN \_\_\_\_\_ (*insert location of workshop*)!**