

**Post Grant Final Report
Unitarian Society of New Haven, July 31, 2005**

In the spring of 2004 the Unitarian Society of New Haven received a grant of \$20,000 from the UU Funding Panel. This grant represented the critical first piece in the much larger overall proposal to the Unitarian Universalist Association for funding for the Partnership for Growth. The overall proposal was for \$300,000 spread over four years, with USNH generating a third of the funds from our own membership.

The Partnership for Growth (PFG) is an ambitious attempt to assist the Unitarian Society of New Haven in accelerated growth from a mid-size to large congregation over the course of four years. At the same time it is an new experiment in collaborative lateral relationships with the four other largest UU congregations in the Clara Barton District. This lateral collaboration has a two-fold purpose. It is designed to forge mutually supportive ties among the congregations to aid all five in becoming stronger and larger; and it is also designed to assist the UUA in creating a new model for congregational growth that will be widely applicable in UU congregations throughout the country.

This final grant report is therefore “final” only in the sense that the generous initial grant from the UU Funding Panel has been utilized. It is of course not “final” in that we have only completed the first year of our four-year project, so although we are very pleased with the results thus far, they are preliminary.

The answers to the questions asked in the report form follow, with several supporting documents noted and attached to this form.

1. Please describe the major activities of the project.

In Year One of the PFG our major project was to hire a full-time Coordinator for Member Services (Gina Mitchell), and utilize her skills in order to lay the groundwork for growth at USNH and coordinate collaboration among the five PFG congregations.

The total cost for this first year was about \$42,000, of which \$20,000 came from the UU Grants Panel and the rest from the UUA. These funds were used for the salary and benefits of our new Coordinator and in support of her work (publicity and outreach, conference costs, computer and other essential equipment). In the coming year (Year Two), the cost for this position begins to phase into the USNH operating budget, one-third each year, as envisioned in the original grant proposal.

With the addition of this new and critically important staff position, USNH was able to launch a whole range of new outreach and support activities designed to increase our visibility in the community and link newcomers into the fabric of congregational life. Our Coordinator was also essential to creating the network that now links the five PFG congregations in the Clara Barton District .

HIGHLIGHTS IN YEAR ONE OF THE PARTNERSHIP FOR GROWTH:

- A complete reconstruction of the USNH website, which has become an essential part of our outreach (25% of this year's visitors told us our website was their first introduction to USNH). **Attached** is a copy of the new home page.
- Development of a rigorous system of data collection and analysis that allows us to track our newcomers, ensure they are quickly connected to relevant areas of congregational life, and tells us how better to enhance our outreach and assimilation (see the **attached** summary). All the templates used, as well as our conclusions, have been shared with the four other PFG congregations.
- Creation of a dynamic Young Adult group which now includes over forty individuals, of whom nearly 30 are new to USNH. Additionally we are developing a separate list for college students, which now includes over a dozen members.
- An ambitious new outreach effort that included spots on NPR radio stations, advertisements in the local entertainment/calendar weekly, flyers in local campuses and coffee houses, and ads in various concert or drama ad books in our area (sample ad **attached**)
- New initiatives to bring newcomers into deeper connection at USNH, including an expansion of our History and Heritage class; Small Groups Ministry sessions for newcomers and for young adults; Adult Religious Education classes designed for "seekers" new to Unitarian Universalism; and several new social events designed to bring visitors and new members into greater contact with established USNH leaders
- Four gatherings of lay leaders from the five PFG congregations, in addition to the regular meetings among the ministers. These lay leader gatherings included Membership Teams, Boards of Trustees and Religious Education teams. The last of our meetings (June 9 '05) was led by a paid facilitator from the Worcester congregation who has developed a presentation on "Welcoming as a Spiritual Practice"
- Creation of an e-list linking lay leaders from the five PFG congregations, which is managed and promoted by our Coordinator for Member Services. This summer Yahoo chat-groups are being added, broken up into interest areas (stewardship, membership, pastoral outreach, religious education)
- Dissemination to leaders within the PFG congregations of all advertising and data-gathering tools implemented thus far at USNH, in the hope that others will make use of them

- An extremely successful fundraising effort to generate the USNH share of the overall PFG funds (\$100,000 out of the total \$300,000). Within less than a month nearly all of these funds had been pledged, above and beyond our operating budget.

2. What were the project's major accomplishments?

USNH is succeeding in its efforts to grow! We welcomed 52 people into membership this year – a significantly higher rate of new member growth than we've seen in prior years. At the same time we strengthened our three-session "Pathway to Membership" class, clarifying the high expectations we have of those who become full members; and we instituted a more systematic process for moving inactive members to the status of "friend" so that our membership figures would be absolutely accurate.

In this first year of the Partnership for Growth, USNH also developed a rigorous system for learning who our visitors are, how they found out about us, what they are seeking in their spiritual home and what moves them – or fails to move them – toward membership. Because of this new rigor in tracking newcomers, we learned that USNH had 182 visitors September through June; that nearly a quarter of these visitors had school-age children; and that 20% were young adults. This information led us to increase our attention to our burgeoning RE program (including a revision of our staff expansion to allow a strengthening of RE staff in Year Two instead of Year Three). It also led us to put an even higher priority on the formation and nurture of a Young Adult group, which has gone from nonexistent to a network of over 40 individuals, led and coordinated by our Coordinator of Member Services and our DRE, both of whom are young adults.

In addition, we focused our attention on developing new opportunities for small group interaction, particularly those concerned with spiritual exploration and development. We experimented with a wide range of outreach and publicity tools, ranging from almost free (distribution of posters and flyers) to fairly expensive (print ad in the entertainment/calendar weekly).

And perhaps most important, we made all of our learning and all the tools we developed available to the other four congregations in the PFG, in the hope that our experience will resonate far beyond our walls. The four gatherings among the PFG congregations have been very fruitful, and have paved the way for deeper collaboration in succeeding years.

In what ways, if any, did you feel you didn't meet your goals?

Because we have just finished the first of a four-year project, there are no goals that we have failed to meet at this point. However, there are several ways in which we would have liked to report more glowing success.

First, we note from our data-gathering that of our 182 guests this congregational year, a little less than a third went on to engage in our "Pathways to Membership", and only 14% went on to become members (25 individuals; the rest of our 52 new members were drawn

from those who first visited USNH before this congregational year). We would like to bump these numbers up, particularly through greater attention to Small Groups Ministry and other small group opportunities to help people connect. Also, due to our more rigorous membership tabulating, our net gain in members this year was about 6%; this is a bit disheartening, but we believe the groundwork is now laid for much more rapid growth in the next few years.

Second, we have found it difficult to gauge the success of our publicity efforts. Only two newcomers mentioned our advertising as the way in which they learned about USNH. Because we are so early in the PFG experiment and because we have done so little advertising in the past, we have not yet concluded that these efforts are wasted, but simply that their effect may need to be cumulative in making USNH more widely visible and known in the community.

Third, we learned from our data that only about 7% of our new visitors joined Small Groups Ministry. We know that a significant number of other newcomers found their way into other forms of small groups, whether Adult RE, our Young Adults group or other venues we provide. Nevertheless, we are convinced that Small Groups Ministry is absolutely essential in helping people become and remained connected, and we intend to renew our efforts to bring people into this important sphere of congregational life.

Finally, it has taken longer than expected to communicate thoroughly about the Partnership for Growth to the broad membership in the other four PFG congregations. This is partly because the PFG concept originated among the ministers, and it takes time for ideas to trickle down; and partly because the model is multi-faceted and not easily summarized. We lack a central communication tool (e.g. a newsletter read by members of all five congregations), so although key lay members in each congregation are well-informed, greater efforts must be made to communicate with the larger membership.

Conclusion:

The first year of the Partnership for Growth has been a great success, and we are excited to move into Year Two with most of our essential systems for outreach, connection and assimilation fully in place. We are deeply grateful for the faith shown our efforts by the UU Funding Panel, which provided the essential first part of Partnership funding. We will continue to send progress reports each year (shorter versions!), since we expect the benefits of this initial grant will continue to develop in succeeding years.

Documents attached:

- Project budget
- Data on USNH visitors and initiatives
- Homepage of new USNH website
- Sample print ads from outreach efforts this year

Data on USNH Visitors and Initiatives, 2004-2005

Who Is Visiting USNH?

182 adult visitors filled out our new guest forms during the 2004-05 congregational year.

- More than half (53%) hail from Hamden or New Haven.
- 63% female, 36% male
- 23% identified as having children; 20% identified as young adult or college student.
- 28% indicated they had attended USNH before filling out form.
- Guests predominantly came in September (22%), January (15%), and October (13%).

How and Why Are Visitors Coming Here?

Our guest form asks visitors, "How did you find out about USNH?" 46% indicated that they came here through a friend, and 25% said they found us via our website. Other reasons listed infrequently included those who came because they were former members (5), because they drove by the building (4), saw the congregation in the yellow pages (3), were referred by another UU congregation (3), saw USNH listed in the newspaper (3), or knew of USNH through involvement in Interfaith Cooperative Ministries (2).

In the context of a newcomer class and an e-mail survey, a sampling of 39 newcomers were asked what they were seeking in a spiritual home. The strongest responses indicated a need for deeper community, children's religious education, and/or spiritual exploration.

What Happens After They Arrive?

During the course of the year, 25 visitors (14%) made the decision to join as members, along with 27 others who first visited USNH prior to the September start of our tracking process.

31% of newcomers attended at least one class in the History and Heritage series. 13% of our new visitors attended a very successful April dinner designed to introduce them to staff and key lay leaders. More than 12% were involved in Adult Religious Education. Since potluck attendance was tracked beginning in March 2005, 9% of our visitors have attended potlucks (total number is doubtless higher), and 7% were involved in Small Groups Ministry.

As indicated above, 36 visitors from September 12th to June 19th were determined to be young adults; 32 of these were added to the young adult list (22-35) and receive regular online invitations to activities and/or group emails. Fourteen of these new young adults (39%) have participated in at least one activity (along with other young adults who visited before September 2004); others have expressed interest in attending. The four other visiting young adults were put on a college student list, along with the Yale UU group and two interested students from Wesleyan. From March till May, this group received weekly emails listing USNH activities and events; this will continue when students return in the fall.

Why do Visitors Leave?

Since September 2004, the Coordinator for Member Services has completed exit interviews with eight people who have stopped attending USNH. The most prevalent reason was spiritual (4 out of 5)-- specifically the visitor wished to return to their Christian background in 3 cases; in the other, the couple simply did not find “the spiritual feeling [they] so hunger for.” Four (two plus a couple) of these departing visitors said they felt positive about USNH in certain aspects: the welcoming atmosphere; the causes the community supports; the RE program; the welcoming minister; and the music.

Exit interviews are underway during the summer months with a sampling of USNH members who have chosen to let their membership lapse. In all cases our goal is to determine whether there are ways to create a more attentive or welcoming environment so that those inclined to our form of spiritual seeking will choose to remain with us.

How Effective Were Our Strategies?

➤ Marketing Strategies

- *New Website:* Our revised and expanded website has been an immediate success. Forty-six visitors this year (25%) indicated that they found us through our website. Newcomers have also used our website as entry points into the community—by signing up to be a part of the young adults group or to receive a newsletter, sometimes before they even attend services.
- *Advertising:* USNH explored new forms of outreach this year through a variety of advertising forms. We took out two paid ads in the New Haven Advocate; created radio spots for the local NPR broadcast; distributed flyers on the Yale campus and around coffee shops; took out a special Easter ad in the New Haven Register; and took out program ads for several area concerts.

To date, two different visitors indicated they came to USNH because of learning of us through these efforts (the ad in the Advocate, in one case, the flyers in coffee shops in the other). Nevertheless, we believe it is too early to conclude that such advertising reaps no benefits, as the effects may be cumulative (e.g. the repetition of the USNH name and what we offer in a spiritual home).

➤ Connection Strategies

- *Young Adult Group:* Between the young adult and college lists, regular contact has been maintained with nearly 20% of all visitors since September 12, 2004 through emails and group events. This group has met socially and helped out at one Sunday service, and in the summer of 2005 formed a Small Group that met eight times, May through August.

- *Newcomers Dinner*: 50 of this year's visitors were invited, and 23 (13%) of these newcomers attended.
- *Welcome Ministry*: This was an attempt to create "welcoming teams" who would greet newcomers for eight successive Sundays and maintain contact through the year. This effort was less successful because it was difficult to recruit enough teams. However, the learning gained through this effort pointed us toward the PFG workshop conducted in June for all the PFG congregations, focused on "Welcoming as a Spiritual Practice". This is designed to create so large a cadre of "welcomers" that the culture of the congregation is changed and hospitality becomes a central part of who we are.