

# **Metropolitan Strategy for Growth:**



## **A Strategic Plan for Growing Unitarian Universalism in the Dallas/Fort Worth Metroplex**

July, 2002

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# Dallas/Fort Worth Metropolitan Strategy for Growth of Unitarian Universalism

## *Executive Summary*



### **Overview**

While the Unitarian Universalist congregations in the Dallas/Fort Worth Metroplex have grown at a rate of about 25% over the last ten years, the rate of growth has lagged behind the rate of increase in area population. One result of this trend is reduced influence and importance of the UU voice and presence in community life as our voice comes from a smaller percentage of citizens. Today there is approximately one member of a UU congregation for every 3,000 persons, a minuscule presence.

To remedy this trend, the Steering Committee for this project was gathered in October, 2001, and charged in November by representatives of area congregations to produce a plan addressing these goals:

1. Plant a large church in a strategic location.
2. Develop a satellite of First Church, Dallas.
3. Grow Horizon Church (Carrollton) from a midsize to a large church.
4. Promote the growth of existing small and mid-sized churches.
5. Acquire land in strategic locations for future churches.

Task forces were set up for each goal, except 2., which is being delayed until appropriate personnel are available to develop the plan.

### **1. Large Church Startup**

The Large Church Startup Task Force

- Visited D/FW area large churches to see “how it’s done” in other denominations.
- Met with Stefan Jonasson, Coordinator of Services for Large Congregations, about UU large church demographics.
- Met with Lyssa Jenkins (Vice-President for Research, Dallas Chamber of Commerce and President, First Church, Dallas) about demographic trends in the D/FW area.
- Conducted other research.

Convinced that our traditional approach to starting UU churches needs modification, the task force identified several key elements for large church success. Among them are:

- Small group ministries.
- Team of staff to support a wide variety of well-run programs for all ages.
- Excellent production values in Sunday morning worship.
- “Seeker” services with positive messages paired with inspiration or entertainment.
- Location in a demographically growing area.
- Marketing targeted to attract a new crop of UUs.

We believe a UU meta-church will succeed in Northeast Tarrant County given certain assumptions:

- a team of staff who can devote 6 months to gathering members (through small groups, extensive marketing, and big events) before beginning worship with a core of 300 members.
- acquisition of about 10 acres of strategically located land by 2002; building to accommodate 1000 worshippers completed by 2004.
- development of covenant groups and other small group ministries.
- targeting of “Cultural Creatives.”
- staffing and facility to provide a full range of services.

This approach represents a substantial departure from traditional start-ups of UU churches: more reliant on staff, marketing, and small group ministries. Though the up-front money required is greater, so is the return... even within a few years.

**We recommend that the development of such a church begin with the search for a senior minister.**

## **2. First Church Satellite**

Plans will be developed beginning in the fall, when Lyssa Jenkins will be available to chair the effort and Laurel Hallman will have returned from sabbatical.

## **3. Grow Horizon to a Large Church**

Key to the plan to develop UUism in DFW is an increase in the number of large churches. With First Church Dallas and the new congregation, Horizon will provide a third large church option for potential church members. Located in one of the fastest growing areas in the country, Horizon is poised to become a large church, given its staffing pattern, adequate land to accommodate growth, and the preparation and enthusiasm of its congregation.

The Horizon Growth Task Force solicited input from almost half of Horizon's members through small group meetings. Four areas were addressed in planning:

- Growth and Involvement
- Ministry and Staffing
- Program
- Membership Facilities

Key recommendations include:

- Expansion of ministry through Covenant Groups, Pastoral Caregivers, and Neighborhood groups.
- Increased visibility and public image.
- Increased staffing (including office staff and a youth and young adult minister).
- Leadership and Lay Ministry training.
- Expansion of programs for youth and young adults, including after school programs and campus ministry.
- Expansion of sanctuary to serve 1000 members church at 2 or more services.
- Larger, more flexible rooms for religious education and faith development.
- Large multi-use space and additional administrative and parking space.

**We recommend outside assistance for Horizon to help accomplish their goals.**

## **4. Small To Mid-size Growth**

Because of the preponderance of small congregations, they cannot be ignored as we develop an overall growth plan. Two D/FW area congregations – First Jefferson in Fort Worth and Community in Plano – are working to move to program church, becoming stable mid-size congregations. These congregations and the five smaller congregations in the Metroplex need encouragement and support to grow.

The Small to Mid-size Growth Task Force studied the past growth efforts in D/FW and the factors that contribute to and hinder congregational growth. Conclusions reached by this task force were:

- Growth is a choice made by an organization willing to change.
- Self-study of all aspects of congregational life is required for an individual congregation to produce growth.
- Funds advanced to congregations should be contingent on careful self-study and a comprehensive Growth Plan.
- A fulltime professional Growth Consultant can help in the development of a Growth Plan.

**We recommend**

- **continued support and expansion of the SWUUC Growth Consultant Program and**
- **sharing of the “Best Practices” among congregations through such mechanisms as the Fall Leadership Conference.**

## **5. Land Acquisition**

Tracts of about 10 acres or more were identified and priced in:

- Northeast Tarrant County
- Frisco/McKinney
- South Arlington/Mansfield
- Far Northeast Dallas
- Far Southwest Fort Worth.

Prime locations are available in each area, with prices as low as the \$30-40,000/acre range in S. Arlington to \$100,000+/acre in much of the area explored. Northeast Tarrant County is filling in fast, but land could be acquired in the immediate future. Land in other areas could be acquired in the longer term.

**We recommend**

- **purchase of land in Northeast Tarrant County for the Large Church Start and**
- **further investigation of who might purchase land for future congregations and how it might be financed.**



# Plan for Large Church Startup



The Large Church Startup Task Force formed in November 2001 to create a plan to launch a large church in the Dallas-Fort Worth metropolitan area. This task force is one of several formed to support the UUA's strategic growth initiative for the D/FW area.

The Large Church Startup Committee was tasked with addressing the following areas:

- Assumptions
- Profile of Target Customer (congregant)
- Programs
- Resources needed: Facilities, Staff and Marketing
- Budget

In this overview, we briefly outline our plans in each of these areas. Further supporting documentation is included as appendices to this overview.

## Background and Research

As part of our research, we visited 6 large churches in the D/FW area, and discerned some common elements in these very successful churches. The churches we visited offer a thriving community, an oasis in the big city, and a sense of belonging to their members. You can do almost everything except go to work at these churches: social, spiritual, athletics, social outreach, 12-step programs, complete children and youth programs. They offer a positive message in their services, emphasizing either entertainment or inspiration. There was a spirit we sensed in each congregation that centered on the concept of "God is Love". The worship services were theologically lite, and designed more as "seeker" services, with in-depth education offered during Sunday School classes for all ages. However, each church offered a clear theological identity, mostly through their literature. The churches are run like large corporations: large professional staffs, professional-quality production value, well-run programs, lots of technology everywhere, volunteer training programs. The more attractive ones to us offered a sense of warmth and a call to action outside of the walls of the church. Full programming is ubiquitous in all the churches we visited.

**Our intention is to take many of these elements and give them a UU spin.**

In addition, we met with Stefan Jonasson of the UUA to discuss the typical member profile in the UUA's largest and growing churches, and Lyssa Jenkins, of First Church – Dallas to discuss demographic trends in the geographic area of the new church. We also used the Internet to research large churches in other denominations, and to download salary recommendations for ministerial positions from the UUA. We incorporated information from all these sources into our summary and supporting documents.

## Assumptions

- This will be a meta-church, comprised of well-defined and nurtured covenant groups and other small group ministries.
- Program is focused on "individuals that are UU and don't know it".
- Contemporary trends of individuals seeking large churches and full programs will continue and are applicable in Northeast Tarrant and Northwest Dallas, as well Southeast Denton and Southwest Collin counties.
- Funds will be available to "front end" support staff, operations, program development, land and facilities.
- Staff resources will be developed that will assure compatibility with large size organization.
- UU ministers are not commonly trained to serve a large congregation. Close selection and team support will be very important to assure success for the minister, the team, and the denomination.
- We plan to do extensive communication within the service area and begin meeting when the "critical mass" reaches approximately 300 adults. We will begin the church with a large base as a strategy to avoid being "stuck" in either small or medium church sizes.

- Initial staffing will be built around providing services to approximately 450 adults in order to assure that a lack of staff does not become a barrier to growth.
- We expect to obtain permanent facilities that will accommodate at least 1,000 adults.
- The tract of land should accommodate a facility that will serve at least 2,000 adults.
- We need to develop an organization framework that will facilitate development of a team that can provide needed services and be scalable to easily accommodate congregational growth.
- We will reach a "critical mass" of 300 in December 2003 and achieve steady growth to 1,000 in December 2004.
- Land for the new church will be purchased in 2002. Construction of the new facility will be completed by 2004. This is a critical assumption to achieve the growth from 300 to 1,000.

## Profile of Target Customer

In meeting with Stefan Jonasson of the UUA, we discovered that common characteristics of UU members are a larger than average household income, college-educated, and – surprise! – National Public Radio listeners. In addition to these elements, we would like to include the characteristics of the “Cultural Creatives”, who fit well with the Unitarian Universalist traditions, and will be the basis for the profile that we use to target our audience. Those characteristics include:

- They believe in religious mystery, with great emphasis on personal growth and relationships. They have explored a variety of religious paths.
- They support the equality of men and women, and are concerned about violence against women and children.
- They are unhappy with both the left and the right politically.
- They may define their primary relationship as “non-traditional,” whether straight or gay.
- They love the earth and want to live out their values, and will volunteer for a good cause.

## Programs

Even though the primary focus will be on relationships and small group ministries, the new church will have a full slate of programs, including the following:

- *For Children:* Religious education, choir, drama groups, day-care, vacation camps, special events and athletic teams
- *For Youth:* Religious education, YRUU groups, choir, drama groups, OWL, Coming of Age, athletic teams
- *For Adults:* RE classes, Covenant or neighborhood groups, choir, drama, athletics, 12-step programs, special interest groups, Befriender program, spiritual traditions groups (Christian, Jewish, Buddhist, Pagan, etc)
- *For All:* Worship services that are more “seeker” oriented, and ongoing leadership development training for laity and staff.

## Resources

### Facilities

The facility we ultimately acquire and develop must be adequate to provide the programs and support the staff we envision. However, it is planned that initially, the congregation will meet in a temporary facility. Included in the developed facility must be:

- |   |                        |
|---|------------------------|
| • Worship “center” with complete A/V equipment    | • Central office space |
| • Class rooms for Adults, children and youth R.E. | • Nursery              |
| • A space dedicated to the YRUU (youth group)     | • Music/choir space    |
| • Stage/auditorium                                | • Kitchen              |
| • Restrooms                                       | • Parking              |
| • Playgrounds and gardens                         | • Library              |

### Staff

The staff needed for a full-program church includes a Minister, CEO, Youth Minister, Music Director, Minister/Director of Religious Education, full-time administrative assistant, Accounts Payable/Receivable clerk, and a producer for worship events. Additional resources such as cleaning

and maintenance will be added when the congregation moves into permanent quarters. The staff's chief focus will be to empower the ministry of the laity.

### Marketing

Our marketing plan, attached in the Appendix, includes a timetable that commences in fall 2002 and culminates in the opening of the church in December 2003. The plan also includes the development of an appropriate name and identity materials, a very functional website, and a complete Public Relations and advertising campaign, which uses both electronic and more traditional media.

## Large Church Five Year Revenue & Expense Projection

|                                  | 2003     | 2004     | 2005     | 2006    | 2007    | Total     |
|----------------------------------|----------|----------|----------|---------|---------|-----------|
| Attendance (year end)            | 0        | 465      | 808      | 1000    | 1000    | N/A       |
| Per Cent Members (year end)      | 0        | 12.50%   | 42.50%   | 60.00%  | 60.00%  | N/A       |
| Est. No. Members (year end)      | 0        | 58       | 343      | 600     | 600     | N/A       |
| Est. No. Pledge Units (year end) | 0        | 44       | 257      | 450     | 450     | N/A       |
| Av. Net Pledge (year end)        | 0        | 1200     | 1200     | 1300    | 1400    | N/A       |
| Est. Pledge Income               | 0        | 11,775   | 176,550  | 519,756 | 585,000 | 1,293,081 |
| Est. Plate                       | 0        | 42,760   | 109,880  | 100,780 | 96,000  | 349,420   |
| <b>NET REVENUE</b>               | 0        | 54,535   | 286,430  | 620,536 | 681,000 | 1,642,501 |
|                                  |          |          |          |         |         |           |
|                                  |          |          |          |         |         |           |
| <b>EXPENSE</b>                   |          |          |          |         |         |           |
| Start-up                         | 0        | 0        | 0        | 0       | 0       | 0         |
| Consulting/Training Travel       | 49,998   | 0        | 0        | 0       | 0       | 49,998    |
| Staff                            | 0        | 0        | 0        | 0       | 0       | 0         |
| CEO                              | 37,100   | 63,600   | 63,600   | 63,600  | 63,600  | 291,500   |
| Minister                         | 14,600   | 87,600   | 87,600   | 87,600  | 87,600  | 365,000   |
| DRE                              | 10,600   | 63,600   | 63,600   | 63,600  | 63,600  | 265,000   |
| Music Dir                        | 0        | 47,700   | 63,600   | 63,600  | 63,600  | 238,500   |
| Youth Min/Dir                    | 0        | 39,600   | 43,200   | 43,200  | 43,200  | 169,200   |
| Admin                            | 10,500   | 18,000   | 18,000   | 18,000  | 18,000  | 82,500    |
| Producer                         | 0        | 6,000    | 12,000   | 12,000  | 12,000  | 42,000    |
| Accounts Pay/Receivable          | 0        | 36,400   | 62,400   | 62,400  | 62,400  | 223,600   |
| Moving exp @\$5K                 | 10,000   | 0        | 0        | 0       | 0       | 10,000    |
| Marketing/Outreach               | 0        | 0        | 0        | 0       | 0       | 0         |
| Advertising/Collateral expense   | 49,000   | 60,000   | 60,000   | 60,000  | 60,000  | 289,000   |
| Lecture Series (net)             | 5,000    | 12,000   | 12,000   | 12,000  | 12,000  | 53,000    |
| Telemarketing                    | 10,000   | 25,000   | 0        | 0       | 0       | 35,000    |
| Facilities                       | 0        | 0        | 0        | 0       | 0       | 0         |
| Temp Office Rental               | 16,000   | 14,000   | 0        | 0       | 0       | 30,000    |
| Office Capital Expenses          | 7,500    | 0        | 0        | 0       | 0       | 7,500     |
| Worship Site Rental              | 0        | 25,800   | 25,800   | 0       | 0       | 51,600    |
| Land & construct new church      | 0        | 0        | 72,919   | 125,004 | 125,004 | 322,927   |
| (30 yr Mortgage)                 | 0        | 0        | 0        | 0       | 0       | 0         |
| <b>TOTAL</b>                     | -220,298 | -444,765 | -298,289 | 9,532   | 69,996  | -883,824  |

## Assumptions

### Key Dates:

Begin project 1/1/03  
 Begin meeting in temporary quarters 7/1/04  
 Begin building permanent quarters 1/1/04  
 Occupy permanent quarters 6/30/05

### Staff:

Build staff early to assure adequate resources

### Promotion:

Lecture series to raise community awareness and identify prospective members

Focused media campaign

Call Center approach to identifying prospective members

## Capital Requirements

| Year                    | 2003     | 2004        | 2005        | 2006 | 2007 | Total       |
|-------------------------|----------|-------------|-------------|------|------|-------------|
| <b>large church</b>     |          |             |             |      |      |             |
| <b>Costs:</b>           |          |             |             |      |      |             |
| Preliminary Design      | \$35,000 |             |             |      |      | \$35,000    |
| Building & Site         |          | \$5,800,000 |             |      |      | \$5,800,000 |
| Equipment & Furnishings |          |             | \$150,000   |      |      | \$150,000   |
| Total Cost              | \$35,000 | \$5,800,000 | \$150,000   | \$0  | \$0  | \$5,985,000 |
| <b>Financing:</b>       |          |             |             |      |      |             |
| Mortgage 30 years at 7% |          | \$1,315,375 |             |      |      | \$1,315,375 |
| Pledges                 |          |             | \$1,184,625 |      |      | \$1,184,625 |
| NTAUUS Funding          |          | \$50,000    |             |      |      | \$50,000    |
| Outside Funding         |          | \$3,435,000 |             |      |      | \$0         |
| Total Funds             | \$0      | \$4,800,375 | \$1,184,625 | \$0  | \$0  | \$5,985,000 |



# Plan for Horizon Growth



## Assumptions

- Horizon has both the challenge and the benefits of being located in one of the fastest growing areas in the United States.
- Our land can accommodate a large church facility.
- The membership of Horizon wants to serve this area and increase the UU presence in the larger community.

## Background

Horizon has grown from 34 members to 350 members in fifteen years. It called a minister in its first year. Beginning in rented space the church expanded when it needed to, bought land and built a permanent facility in its eighth year of existence. After the first year in the new building a rapid increase in membership made it obvious that the church would need to expand again.

After adding a second service and purchasing a portable classroom to accommodate the 220 children enrolled in Religious Education, the board appointed a growth committee to plan for the expansion. In 1999 the committee met with groups throughout the church and presented plans for expansion to the congregation. An associate minister was called as part of the expansion strategy.

In 2001 another growth task force was charged with involving the congregation in planning for the next step. Almost half of the Horizon membership participated in the discussions.

## Current Status

Horizon is poised to be a large church. It has been staffed for growth and prepared organizationally, so that it should move from a mid-size church to a large church without the usual struggle to redefine the church's power structure. It continues to develop its small groups and neighborhood groups, its lay ministry and leadership training. The congregation has been involved in the planning for growth and the Board has endorsed the growth plan. We believe Horizon is a model for rapid growth in our denomination lacking only the needed capital to see it through its next phase.

## Membership Growth And Involvement

- We see ourselves growing as a meta-church composed of small groups and leadership teams that can provide intimacy, involvement, and empowerment of the membership. We will continue to emphasize transparent decision making while maintaining clear demarcation of authority and responsibility.
- Covenant Groups will be a primary avenue of involvement for the growing membership.
- Pastoral Caregivers and Neighborhood groups will be expanded to provide organization and pastoral care for all members.
- We will increase our visibility and public image through advertising, our web site, increased signage, public witness, interfaith involvement, public forums etc.

## Ministry And Staffing

- We will call a youth and young adult minister to serve the specific needs of those constituencies within the church, in the community and on local campuses. This will include programs and worship services geared to these age groups.
- We will continue to be a teaching church with an internship program.
- We will increase office staffing to meet the needs of the congregation.
- We will provide Leadership and Lay Ministry training for staff, board, council, pastoral caregivers, and small group facilitators.

## **Program**

- A large church will enable Horizon to provide better programming for all ages. Of particular emphasis for the church are youth and young adult programs, after school programs and campus ministry.
- Another focus will be senior daytime programs.
- Adult education and faith development programs will be expanded.

## **Facilities**

Completion of the master plan includes:

- Expansion of the sanctuary and welcoming area to accommodate a 1000 member church at two or more services.
- Larger, more flexible rooms for religious education and faith development for all ages.
- Large multi-use space (cafetorium/gymnasium/performance hall with stage)
- Memorial garden, landscaped parking, retention of green areas.
- Administration space and added offices.

## Operating Budget – Horizon Growth Plan

Comprehensive Five Year Plan

| Proposed Annual Budget    | Plan Year               | FY 2003-2004     | FY 2004-2005   | FY 2005-2006   | FY 2006-2007    | FY2007-2008     |
|---------------------------|-------------------------|------------------|----------------|----------------|-----------------|-----------------|
| Key Activities            |                         | Capital Campaign | Design         | Build          | Move-in 7/1     |                 |
| <b>Operating Income</b>   |                         |                  |                |                |                 |                 |
| Membership (370)          | 340                     | 350              | 370            | 390            | 465             | 550             |
| Avg. Pledge               |                         | 1,395            | 1,393          | 1,391          | 1,438           | 1,437           |
| pledge units              |                         | 200              | 210            | 220            | 262             | 310             |
| Pledges @ 90%             |                         | \$279,000        | \$292,500      | \$306,000      | \$376,650       | \$445,500       |
| Fund Raisers              |                         | \$40,000         | \$40,000       | \$40,000       | \$40,000        | \$40,000        |
| social action             |                         | \$15,000         | \$15,000       | \$15,000       | \$16,000        | \$20,000        |
| Offerings                 |                         |                  |                |                |                 |                 |
| prior year unpledged      |                         | \$5,000          | \$5,000        | \$5,000        | \$5,000         | \$5,000         |
|                           |                         | \$30,000         | \$30,000       | \$30,000       | \$40,000        | \$50,000        |
| Misc Income               |                         | \$10,000         | \$10,000       | \$10,000       | \$10,000        | \$10,000        |
|                           | <i>Growth</i>           | <u>15,000</u>    | <u>15,000</u>  |                | <u>75,000</u>   | <u>50,000</u>   |
|                           | <i>Support</i>          |                  |                |                |                 |                 |
| <b>TOTAL Receipts</b>     |                         | \$394,000        | \$407,500      | \$406,000      | \$562,650       | \$620,500       |
| <b>Operating Expenses</b> |                         |                  |                |                |                 |                 |
| Staff Costs               |                         | \$207,298        | \$212,000      | \$220,000      | \$275,000       | \$310,000       |
| Dues                      |                         | \$23,120         | \$23,800       | \$25,160       | \$30,716        | \$36,300        |
| Total Facilities Costs    |                         | \$60,500         | \$62,500       | \$62,500       | \$75,000        | \$75,000        |
| Committees                |                         | \$8,882          | \$10,000       | \$10,000       | \$15,000        | \$20,000        |
| social action             |                         | \$15,000         | \$15,000       | \$15,000       | \$16,000        | \$20,000        |
| Misc.                     |                         | \$7,000          | \$7,000        | \$7,000        | \$10,000        | \$15,000        |
| Fund Raising              |                         | \$5,500          | \$5,500        | \$5,500        | \$8,000         | \$12,500        |
|                           | <i>Capital Campaign</i> | \$15,000         | \$15,000       |                |                 |                 |
| Old Debt Service          |                         | \$48,700         | \$48,000       | \$46,500       | \$45,000        | \$44,500        |
| <u>New debt service</u>   |                         | <u>0%</u>        | <u>0%</u>      | <u>0%</u>      | <u>\$80,000</u> | <u>\$80,500</u> |
| Total debt service        |                         | \$48,700         | \$48,000       | \$46,500       | \$125,000       | \$125,000       |
|                           | % of Budget             | 12%              | 12%            | 12%            | 22%             | 20%             |
| <u>Prior Year deficit</u> |                         | <u>\$5,000</u>   | <u>\$5,000</u> | <u>\$5,000</u> | <u>\$5,000</u>  | <u>\$5,000</u>  |
| <b>TOTAL Expenses</b>     |                         | \$396,000        | \$403,800      | \$396,660      | \$559,716       | \$618,800       |
| Surplus/Deficit           |                         | -\$2,000         | -\$1,800       | \$2,340        | \$2,934         | \$1,700         |

## Capital Budget – Horizon Growth Plan

### Program & Facilities Expansion Costs

|                        |                                |                              |                  |  |
|------------------------|--------------------------------|------------------------------|------------------|--|
|                        | Preliminary Design             |                              | 35,000           |  |
|                        | Building & Site                |                              | 4,020,000        |  |
|                        | Expansion Equip. & Furnishings |                              | 150,000          |  |
|                        | <u>Growth Support</u>          |                              | <u>155,000</u>   | Funds to support this 5 year growth plan |
| <b>TOTAL Costs</b>     |                                |                              | <b>4,360,000</b> |  |
| <b>Financing</b>       |                                |                              |                  |  |
|                        | Capital Campaign               |                              |                  |  |
|                        |                                | Pledges                      | 1,000,000        |  |
|                        |                                | Outside Gifts                | 250,000          |  |
|                        |                                | Funding Yet to be Determined | 2,100,000        |  |
|                        | Total Capital Campaign         |                              | 3,350,000        |  |
|                        | Mortgage                       | 30 years at 7%               | <u>1,010,000</u> |  |
| <b>TOTAL Financing</b> |                                |                              | <b>4,360,000</b> |  |

## Time Table

- September 2003: Begin Capital Fund Drive
- March 2004: Architect Search Committee elected
- May 2004: Architect selected, begins work
- September 2004: Vote on architectural plan
- October 2004: Break ground
- July 2005: Move into new building
  - Begin enlargement of sanctuary
- July 2006: Completion of master plan and move in to sanctuary

## Explanation Of Five Year Plan

### INCOME

1. Membership: Based on moderate growth through building phase, growth spurt in first two years after building.
2. Average pledge reflects Horizon's history.
3. Pledges are shown at 90% to reflect accurate collection.
4. Fund raisers could increase. Social action is in and out.
5. Prior year offerings are offset by previous year debt.
6. Unpledged offerings and misc. income reflect some growth.
7. Growth support is grant money for capital campaign and increase in staff. This is shown here to balance the budget during building project.

### EXPENSES

8. Staff costs reflect reinstating the intern the first year, hiring a full time Church Administrator in fourth year, and calling a youth/young adult/campus minister the fifth year.
9. Dues are fixed by membership.
10. Facilities costs reflect new building costs in the fourth year.

11. Old debt service could be rolled into the new debt, but is shown here as separate.
12. Note percentage of budget remains under 25%.

#### PROGRAM AND FACILITIES EXPANSION

13. The estimate is for complete development of the master plan which would complete the development of the six acre campus. Although this may be beyond our capability to fund, it is the best plan for growing into a large church.
14. Pledges of one million dollars from the membership is probably about all we can expect.
15. We cannot count on outside gifts but will actively seek them.
16. NTAUUS deferred loan is a ten year deferral to be paid back into the metropolitan growth fund over twenty years.
17. UUA grant could include other grants for funding campus ministry or land development. If the building project is pared down, the cost saving would come first out of this line.
18. This mortgage is sustainable.
19. Church bonds could restructure this plan but are not included in this model.

# Plan for Land Acquisition



## Charge

The Land Acquisition Sub-committee was charged with identifying growth areas within the North Central Texas Metroplex, establishing basic requirements for building sites for new Unitarian Universalist churches, surveying the areas to identify potential building sites for location of new churches (both for immediate development and for land banking for future development), and providing an estimate of acquisition costs.

## Growth Areas

The following growth areas not currently served with conveniently located existing congregations were identified:

1. **Northeast Tarrant County**, bounded by Tarrant County Line on the East, Hwy 183/North Loop 820 on the South, 1-35W on the West, and Lake Grapevine on the North. This area contained in excess of 300,000 people in 2000 Census and is projected by North Central Texas Council of Governments as a high growth area through 2025.
2. **Allen-McKinney-Frisco** area, not as heavily populated now but also projected as a high growth area by NCTCOG.
3. **South Mid Cities**, basically South Arlington-South Grand Prairie-Mansfield currently experiencing explosive development. Projected by NCTCOG for high growth through 2025.
4. **Far Northeast Dallas County**-Wylie-Rowlett around the lake, currently experiencing significant development and projected for long range growth.
5. **Southwest Tarrant County**. Future growth area for Tarrant County.

## Basic Requirements

The proposal under consideration is the founding of one or more new Unitarian Universalist churches as large church projects, beginning with at least 300 members with the ability to grow to 1,000 members. Based on the experience of existing UU churches that have experienced significant growth, observation of other denominations activities and advice from an experienced church builder, we concluded that approximately 10 acres is the optimum land size. Other requirements are convenient location within a growing demographically advantageous area, convenient access from major thoroughfares, and good visibility to large amounts of traffic, and proper setting for a church, in other words much the same requirements as any good retailer would have.

## Cost

Cost is a very difficult matter to pin down. Generally the more advantageous a parcel's attributes, the more developed the area and the better the location for visibility and accessibility, the higher the price. The prices quoted are "asking prices", and some of the prices quoted are not in line with the general trend. It appears from our survey that the price for a 10 acre tract would range from \$300,000 to \$1,000,000 and possibly more. Larger tracts with a longer time to development could be less. The probabilities are that the prices would increase over time. That depends on what happens to the economy and whether the current growth of the Metroplex continues.

## Availability

Currently availability is not a problem in any of the areas, although the Northeast Tarrant County area is rapidly filling in.

## Conclusion

Based on our research, our recommendation is to first concentrate on the Northeast Tarrant County area since it has an existing population base sufficient to support at least the size the church is projected to be at founding. The demographics are good for UU support. Desirable potential sites will disappear here first. Sites identified in the other areas are further from development. In some cases they are large tracts that have yet to be subdivided. Early purchase of these tracts could mean much lower costs.

| Area                            | Rank | Size  | Asking \$ | Location                         | Remarks  |
|---------------------------------|------|-------|-----------|----------------------------------|--|
| <b>NE Tarrant County</b>        |      |       |           |                                  |  |
| <b>1</b>                        | 1    | 9+    | 800,000   | Hwy 1709 @ White Chapel          | Across from large Methodist church. Zoned commercial         |
|                                 | 2    | 9+    | 425,000   | Rufe Snow south of Hwy 1709      | Aesthetically pleasing wooded lot                            |
|                                 | 3    | 9+    | 348,000   | Smithfield south of Hwy 1709     |  |
|                                 | 4    | 12    | 1,200,000 | Hwy 1709 west of Davis           | Zoned residential  |
|                                 | 5    | 9+    | 2,000,000 | Hwy 1709 east of Davis           | Zoned commercial   |
| <b>Allen/McKinney/Frisco</b>    |      |       |           |                                  |  |
| <b>2</b>                        | 1    | 10    | 550,000   | Tollway @ Eldorado Pkwy (Frisco) | Parcel from Eldorado Tollway Ltd                             |
|                                 | 2    | 17.7  | 600,000   | Custer @ Walnut Grove (McKinney) | 1/2 in flood plain; Grace Presby owned;not motivated sellers |
|                                 | 3    | 9     | 1,955,190 | FM 720@ Independence (Frisco)    | High visibility; adjacent to future city park                |
|                                 | 4    | 7.8   | 422,042   | FM 720 @ Hardin (McKinney)       | High visibility intersection;below market;241' of frontage   |
| <b>South Mid-Cities</b>         |      |       |           |                                  |  |
| <b>3</b>                        | 1    | 20    | 800,000   | Hwy 1382 south of I20            | Hot area just sold to developer who is offering parcel       |
|                                 | 2    | 78    | 1,248,000 | Lone Star @ Lowe (Mansfield)     | Excellent land bank opportunity                              |
|                                 | 3    | 10    | 400,000   | Hwy 287 @ Lone Star (Mansfield)  | Parcel from 353 acre developer site                          |
|                                 | 4    | 12    | 389,000   | Bus. 287 @ S. Main (Mansfield)   | Good access on 287   |
|                                 | 5    | 16    | 653,400   | Eden @ Silo                      | Good access to Collins. Currently undeveloped area.          |
|                                 | 6    | 28.4  | 3,649,456 | Matlock @ Broad                  | Good access on Matlock                                       |
| <b>Far NE Dallas/Wylie etc.</b> |      |       |           |                                  |  |
| <b>4</b>                        | 1    | 34.88 | 1,046,400 | FM 544 @ Sanden                  | Major thoroughfare; near Wylie H.S.                          |
|                                 | 2    | 10.4  | 1,359,072 | Murphy Rd @ Campbell/Blackburn   | High visibility; high growth residential; near telecom       |
|                                 | 3    | 8     | 1,742,400 | FM 544 @ McCrary                 | Major thoroughfare; near residential and shopping            |
|                                 | 4    | 14    | 2,950,000 | FM 544 @ Maxwell Creek           | Major thoroughfare; near residential and shopping            |
| <b>SW Tarrant County</b>        |      |       |           |                                  |  |
| <b>5</b>                        | 1    | 19.5  | 2,335,905 | Harris Pkwy south of Dutch Brand | Possibility of 10 acre parcel; proposed Hwy 121              |
|                                 | 2    | 15.7  | 1,367,784 | Dutch Brand @ Old Granbury       | New development including subcourthouse and senior living    |
|                                 | 3    | 21.5  | 2,343,745 | Old Granbury @ Altamesa          | Possibility of smaller parcel; at exit of proposed Hwy 121   |
|                                 | 4    | 11.9  | 2,462,229 | Harris Pkwy @ Dutch Brand        | Across from Methodist Harris Hospital; proposed Hwy 121      |



# Small to Midsize Growth Plan



## Scope/Purpose

The Growth Steering Committee advocated for the formation of a Small to Midsize Growth Task Force for some of the following reasons:

- Numerically, in the Metroplex and nationally, small congregations constitute the highest percentage of our member organizations
- Many small congregation members actively seek the benefits and programs of a larger congregation
- Because of the preponderance of small congregations, success for the overall growth plan requires some of our growth be generated in our smaller member fellowships and churches

It was the charge of this committee to recommend the approach to growth for motivated, self-chosen organizations, which would offer them the best chance for successful growth.

## Summary of Past Growth Efforts

The Metroplex has a history of UUA sponsored Growth Campaigns. The most recent effort was known as “The Religion that puts its Faith in you” campaign (see appendix.) It concentrated on raising the awareness of citizens to the existence of our congregations. Little attention was focused on the quality of programs, staffing and facilities recruited prospects would find. As a result, some prospects referred to congregations found those fellowships or churches to be ill prepared or reluctant to grow.

## Nature of the Solution

Growth is a choice made by an organization willing to change. Based on the experience of prior growth campaigns and study of other religious organizations, successful growth efforts must be generated internally by vibrant and motivated organizations willing to conduct comprehensive self analysis focusing on the quality and plans for programs, facilities and staffing. The religious community taking this encompassing view will be best prepared for success.

The Appendix includes a survey originally formulated by the current District Growth Consultant. Completion of the Growth Survey requires major effort measuring all aspects of church organizational life.

## Summary of Recommendations

- This committee concludes that even the best-prepared and motivated organization with a well thought out plan, appropriate to its particular characteristics, could be best served by continuing interaction with a Growth Consultant or Coach.
- The best application of resources means continued and upgraded funding of Growth consultants. It is the recommendation of the committee that financial resources available for Small to Medium Growth be applied first to funding Growth Consultants to work on a continuing basis with those fellowships and churches deemed prepared for growth.
- It is the recommendation of this committee that those organizations selected for support of their growth efforts be expected to contribute their own financial resources and demonstrate their commitment to and readiness for growth by a process determined by a qualified Growth Consultant, and probably including a comprehensive questionnaire as contained in this Appendix.
- The committee would further recommend that congregations of all sizes but particularly small to midsized congregations, be encouraged to consider the practices of other UU congregations in order

that they might be exposed to better organizational practices and structures. Oftentimes, inadequate and/or inappropriate and/or structures present needless barriers to growth. Sometimes practices that are appropriate for a small, family sized congregation are continued even when the congregation has grown to a point where the practice is counter-productive. By encouraging congregations to look to one another's practices, it is more likely that "Best Practices" in a variety of areas of congregational life will be identified and put into practice. An appropriate venue for this might be Fall District Conferences.

- Any funds advanced to individual congregations from UUA support, or District fundraising should only be supplied to those congregations that have gone through the survey and evaluation by the Growth Consultant and only in support of a comprehensive Growth Plan not a piecemeal approach.
- Additional growth consultants should be identified, hired and trained such that more than one would be available on a District-wide basis. Further, while not particularly in the purview of this committee's work, the Growth Consultant program needs to be expanded on a phased nationwide basis, utilizing information gathered during the work of the Southwest District Steering Committee. A training program should be implemented.

### Issues on Funding and Staffing

We recommend that the UUA subsidize funding to continue the work of existing Growth Consultants (See Appendix for summary of SWUUC Growth Consultant work.) and advance the appointment to full time. As the Growth Consultant program becomes more widespread, congregations should be expected to pay more and directly for those services.

One Growth Consultant position requires about \$75,000 for full time staffing, travel, phone and supplies. An engagement with a growth candidate church should command a consulting fee of approximately \$1000 per day and we would assume an average engagement of 5-6 days (with phone follow-up between visits) spread over a number of months. For planning purposes, assume 5 engagements per year at 5 days X \$1000 or \$25,000 in congregational support.

It is likely to be midyear 2003 for the Growth Consultant to achieve a full calendar of engagements. It is likely that District and Cluster support could amount to \$5,000 for 2003, growing to \$10,000 in 2004 and \$15,000 thereafter. Assuming the above facts, a simple cash flow analysis would look as follows:

|                             | 2003            | 2004            | 2005            | 2006            | 2007            |
|-----------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Salary including Travel     | \$75,000        | \$75,000        | \$75,000        | \$75,000        | \$75,000        |
| Dist/Cluster Support        | 5,000           | 10,000          | 15,000          | 15,000          | 15,000          |
| Fee Revenues                | 12,000          | 25,000          | 25,000          | 25,000          | 25,000          |
| <i>Net UUA Contribution</i> | <i>\$58,000</i> | <i>\$40,000</i> | <i>\$35,000</i> | <i>\$35,000</i> | <i>\$35,000</i> |

It might be possible to recruit business executives with organizational development experience to train as Growth Consultants. Utilizing business executives in early retirement might permit the continuation of the staffing on a part time basis.

### Timeline Considerations

We recommend continued and increased funding for the Southwest District Growth Consultant starting in January 2003. We recommend establishment of a Growth Consultant Training Program by April 2003. Additional communication extolling the benefits to small congregations should be developed and underway by June 2003. We propose a benchmark of having at least one additional Growth Consultant for the Southwest District by June 2004.

# Metroplex Growth Strategy Five Year Financial Projections

## Operating Revenues & Expenses

| Year                       | 2003       | 2004       | 2005        | 2006        | 2007        | Total        |
|----------------------------|------------|------------|-------------|-------------|-------------|--------------|
| <b>Large Church Start</b>  |            |            |             |             |             |              |
| Revenue                    | \$0        | \$54,535   | \$286,430   | \$620,536   | \$681,000   | \$1,642,501  |
| Expense                    | \$220,298  | \$499,300  | \$584,719   | \$611,004   | \$611,004   | \$2,526,325  |
| Net Outside Support        | -\$220,298 | -\$444,765 | -\$298,289  | \$9,532     | \$69,996    | -\$883,824   |
| <b>Horizon UU Church</b>   |            |            |             |             |             |              |
| Revenue                    | \$379,000  | \$392,500  | \$406,000   | \$487,650   | \$570,500   | \$2,235,650  |
| Expense                    | \$396,000  | \$403,800  | \$396,660   | \$559,716   | \$618,800   | \$2,374,976  |
| Net Outside Support        | -\$17,000  | -\$11,300  | \$9,340     | -\$72,066   | -\$48,300   | -\$139,326   |
| <b>Growth Consultant</b>   |            |            |             |             |             |              |
| Revenue                    |            |            |             |             |             |              |
| Fees                       | \$12,000   | \$25,000   | \$25,000    | \$25,000    | \$25,000    | \$112,000    |
| Dist/Cluster               | \$5,000    | \$10,000   | \$15,000    | \$15,000    | \$15,000    | \$60,000     |
| Expense                    | \$75,000   | \$75,000   | \$75,000    | \$75,000    | \$75,000    | \$375,000    |
| Net Outside Support        | -\$58,000  | -\$40,000  | -\$35,000   | -\$35,000   | -\$35,000   | -\$203,000   |
| <b>NTAUUS Fund raising</b> |            |            |             |             |             |              |
| Revenue                    |            |            |             |             |             |              |
| Pledges                    | \$0        | \$50,000   | \$50,000    | \$50,000    | \$0         | \$150,000    |
| Expense                    | \$0        | \$0        | \$0         | \$0         | \$0         | \$0          |
| Net Outside Support        | \$0        | \$50,000   | \$50,000    | \$50,000    | \$0         | \$150,000    |
| <b>North Texas Summary</b> |            |            |             |             |             |              |
| Income                     | \$396,000  | \$532,035  | \$782,430   | \$1,198,186 | \$1,291,500 | \$4,200,151  |
| Expense                    | \$691,298  | \$978,100  | \$1,056,379 | \$1,245,720 | \$1,304,804 | \$5,276,301  |
| Net Outside Support        | -\$295,298 | -\$446,065 | -\$273,949  | -\$47,534   | -\$13,304   | -\$1,076,150 |

# Metroplex Growth Strategy Five Year Financial Projections

## Capital Costs and Funding

| Year                        | 2003            | 2004        | 2005        | 2006        | 2007        | Total        |
|-----------------------------|-----------------|-------------|-------------|-------------|-------------|--------------|
| <b>Large Church Startup</b> |                 |             |             |             |             |              |
| <b>Costs:</b>               |                 |             |             |             |             |              |
| Preliminary Design          | \$35,000        |             |             |             |             | \$35,000     |
| Building & Site             |                 | \$5,800,000 |             |             |             | \$5,800,000  |
| Equipment & Furnishings     |                 |             | \$150,000   |             |             | \$150,000    |
| <b>Total Cost</b>           | <b>\$35,000</b> | \$5,800,000 | \$150,000   | \$0         | \$0         | \$5,985,000  |
| <b>Financing:</b>           |                 |             |             |             |             |              |
| Mortgage 30 yrs. @7%        |                 | \$1,315,375 |             |             |             | \$1,315,375  |
| Pledges                     |                 |             | \$1,184,625 |             |             | \$1,184,625  |
| NTAUUS Funding              |                 | \$50,000    |             |             |             | \$50,000     |
| Outside Funding             |                 | \$3,435,000 |             |             |             | \$3,435,000  |
| <b>Total Funds</b>          | <b>\$0</b>      | \$4,800,375 | \$1,184,625 | \$0         | \$0         | \$5,985,000  |
| <b>Horizon Growth</b>       |                 |             |             |             |             |              |
| <b>Costs:</b>               |                 |             |             |             |             |              |
| Preliminary Design          |                 | \$35,000    |             |             |             | \$35,000     |
| Building & Site             |                 |             | \$4,020,000 |             |             | \$4,020,000  |
| Equipment & Furnishings     |                 |             |             | \$150,000   |             | \$150,000    |
| Growth Support              |                 |             | \$155,000   |             |             | \$155,000    |
| <b>Total Cost</b>           | <b>\$0</b>      | \$35,000    | \$4,175,000 | 150,000     | \$0         | \$4,360,000  |
| <b>Financing:</b>           |                 |             |             |             |             |              |
| Mortgage 30 yrs. @ 7%       |                 |             |             | \$1,010,000 |             | \$1,010,000  |
| Pledges                     |                 |             |             |             | \$1,000,000 | \$1,000,000  |
| Outside Funding             |                 |             |             | \$2,350,000 |             | \$2,350,000  |
| <b>Total Funds</b>          | <b>\$0</b>      | \$0         | \$0         | \$3,360,000 | \$1,000,000 | \$4,360,000  |
| <b>Total Capital Costs</b>  | <b>\$35,000</b> | \$5,835,000 | \$4,325,000 | \$150,000   | \$0         | \$10,345,000 |
| <b>Total Capital Funds</b>  | <b>\$0</b>      | \$4,800,375 | \$1,184,625 | \$3,360,000 | \$1,000,000 | \$10,345,000 |

# **Metropolitan Strategy for Growth: A Strategic Plan for Growing Unitarian Universalism in the Dallas/Fort Worth Metroplex**



## **Appendices**

- I. Charge For The Committee To Foster Growth Of Unitarian-Universalism in the North Central Texas Metroplex
- II. The Planning Process
- III. Dallas-Fort Worth Metro Area – Growth Trends  
Prepared by Charlotte Cowtan
- IV. Marketing Plan for Large Church Startup  
Prepared by Bob Martin
- V. Recommendations for Risk Mitigation/Due Diligence (Land Acquisition)
- VI. History of Past Growth Campaigns
- VII. Growth Consultant Activities in DFW Area
- VIII. Growth Consultant Program Comprehensive Survey



## Appendix I

### Charge For the Committee To Foster Growth of Unitarian Universalism in the North Central Texas Metroplex

While the UU congregations in the Metroplex have been growing the rate of growth has lagged far behind the rate of increase in area population. One result of this trend is reduced influence and importance of the UU voice and presence in community life as our voice comes from a smaller percentage of citizens. Today there is approximately one member of a U-U congregation for every 3,000 persons, a minuscule presence.

The Growth Steering Committee (GSC) will guide the preparation of a 5-10 year plan to focus and coordinate activities for the Unitarian Universalist Association, the Southwestern Unitarian Universalist Conference, the North Texas Association of Unitarian-Universalist Association and local congregations to accelerate the growth of UUism in the Metroplex to three times the current number or 5,100 members by December 31, 2011.

The GSC will:

- Assure that all stakeholders are involved in the development and implementation of the plan.
- Identify the relative potential for growth of:
  - existing congregations.
  - sponsorship of new congregations by present ones.
  - start up congregations in under served areas of the metroplex.
- Identify available and potential resources required for implementation and secure commitment of the resources.
- Recommend specific goals for meeting growth targets and monitor achievement of goals.
- Recommend allocation of funds from UUA, SWUUC, and NTAUUS for specific programs and projects.
- Evaluate programs and projects for effectiveness and portability.

The plans will be divided into three sections:

- Immediate action plan—2002-2004
- Intermediate plan—2005-2008
- Long range plan –2009-2011.

## Appendix II

### The Planning Process

Throughout the process outlined below there must be continuous communication to and participation of all stakeholders. Of all the elements and steps contained in this charge, this is the most critical to the success of the effort. We will foster a culture in every participating congregation that not only welcomes growth, but also pursues it, both in numbers and depth of religious experience.

Preparation of a plan of the scope envisioned by the UUA and the Metroplex Representatives that attended one or both of the meetings held to date will require a major effort and time commitment.

Task forces will be appointed to prepare a strategic plan outline for each of the major goals:

1. Plant a large church in a strategic location.
2. Develop a satellite church by First Church, Dallas.
3. Grow Horizon from a midsize to a large size church.
4. Promote the of those small sized churches that want to become midsize Churches.
5. Acquire land in strategic locations for future churches.

A member of the steering Committee will chair each of the task forces.

The Plan outline will lay out the necessary steps to move from where we are today to achievement of the specific goal.

Three categories of requirements will be addressed:

- Programming
- Staffing
- Facilities

An estimate of resources required to achieve each step in the process be prepared. For the initial planning phase, where the required resources will come from is not an issue. That will come later as the strategic plan outlines are merged into an over all plan.

At that time over all priorities will be established and the anticipated sources of required resources be determined.

Completion of this initial phase of the project is scheduled for April 30, 2002.

## Appendix III

### Dallas-Fort Worth Metro Area – Growth Trends Prepared by Charlotte Cowtan

The Dallas - Fort Worth Metro area grew 24% from 1990-2000 and is projected to continue growing at the same rate. (12% from 2000-2005). Saturation, however, is still very low:

- There were 5 UUs in every 10,000 of the DFW general population in 2000 (Ref:Tbl#1)

UU membership matched and RE exceeded the population growth from 1990 - 2000:

- Adult membership grew 24% (Comp. 24% general Population)
- RE enrollment grew 44% (Comp. 22% ages 0-14, and 13% ages 15 -24)

**TABLE #1: Dallas - Fort Worth UU Membership and Saturation Overview**

| Dallas-Fort Worth Metro Area | 1990 | 2000 | 90-00 % Inc. | '00 UU Saturation |
|------------------------------|------|------|--------------|-------------------|
| DFW UU Adult Membership      | 1390 | 1730 | 24%          |                   |
| DFW UU Religious Ed. Enroll. | 499  | 719  | 44%          |                   |
| <b>TOTAL</b>                 | 1889 | 2449 | 30%          | .05%              |

There was a sharp reversal of the 1995-2000 congregational growth pattern in 2000 - 2001. This is particularly concerning for congregations located in areas that are currently experiencing rapid growth in the general population. Horizon and Community UU Churches, for example, are both in rapidly growing areas but show declining/erratic membership patterns respectively. (Ref: Tbl#2; Also see Membership Charts # 1 and #2, Pages 6-7)

**TABLE #2: Dallas – Fort Worth Membership Gain/Loss – 1995-2001**

| CONGREGATION             | ORG YR | % 95-00    | % 00-01    | % 96-01    | Projected. Gen Pop Growth 2000-2005 |
|--------------------------|--------|------------|------------|------------|-------------------------------------|
| 1st Unit. Church; Dallas | 1899   | 19%        | -4%        | 11%        | 4%                                  |
| Denton UU Fellowship     | 1949   | 11%        | 11%        | 24%        | 14%                                 |
| UU Fellowship of Dallas  | 1961   | -38%       | 5%         | -28%       | 4%                                  |
| 1st Jefferson UU Ch.     | 1966   | 77%        | -26%       | 8%         | 8%                                  |
| Horizon UU Church        | 1987   | 82%        | -3%        | 75%        | 18%                                 |
| Westside UU Church       | 1995   |            | -3%        | 50%        | 8%                                  |
| Pleasant Valley UU Ch.   | 1967   | -3%        | -3%        | -6%        | 6%                                  |
| Arlington UU Church      | 1965   | -4%        | 0%         | -4%        | 9%                                  |
| Comm. UU Ch: Plano       | 1975   | -15%       | 6%         | -3%        | 20%                                 |
| <b>TOTALS</b>            |        | <b>27%</b> | <b>-4%</b> | <b>16%</b> | <b>12%</b>                          |

The entire DFW Metro area is projected to continue growing over the next decade, but the fastest growing residential areas will be in the northern sections of the metropolis. Horizon and Community UU Churches are currently located at the southern edge of the projected growth belt, and Denton is on the NE edge of a major projected growth.

Frisco and the surrounding communities are projecting 36% to 45% growth! The Flower Mound area is expected to grow 36% from 2000 -2005. (See Growth and Population maps: pages 8-9)

The median age in the DFW area is increasing slowly, but the largest age group by far is age 25-44 (1,637,044), followed by children aged 0-14 (1,136,178). Ages 45 and older will increase most rapidly over the next few years but will continue to be outnumbered almost two to one by people under 45 years of age. (Ref: tbl#3).

Appendix III, p. 2

**TABLE #3: Dallas – Fort Worth Area Population by Age**

| <b>DFW Population</b>       | <b>1990</b>      | <b>2000</b>      | <b>2005<br/>Proected</b> | <b>90-00 Inc%</b> | <b>00-05Proj.<br/>Inc%</b> |
|-----------------------------|------------------|------------------|--------------------------|-------------------|----------------------------|
| DFW Median Age              | 31               | 34               | 35                       |                   |                            |
| DFW Age 0-14                | 933,348          | 1,136,178        | 1,225,864                | 22%               | 8%                         |
| DFW Age 15-24               | 591,874          | 666,456          | 764,337                  | 13%               | 15%                        |
| DFW Age 25-44               | 1,489,635        | 1,637,044        | 1,669,524                | 10%               | 2%                         |
| DFW Age 45-54               | 409,178          | 677,096          | 817,881                  | 65%               | 21%                        |
| DFW Age 55+                 | 613,239          | 873,248          | 1,110,946                | 42%               | 27%                        |
| <b>DFW Total Population</b> | <b>4,037,274</b> | <b>4,990,022</b> | <b>5,588,552</b>         | <b>24%</b>        | <b>12%</b>                 |

## Appendix IV

# Marketing Plan for UUA Metroplex Large Church Start By Bob Martin

### Mission

To provide the communications necessary to generate and sustain interest in a new large Unitarian Universalist faith community in the greater Dallas area.

### Timetable

The efforts described herein will be initiated Fall 2002 and will continue until one year after the opening of the new church.

### Objectives

- Create a powerful image for the large church
- Create initial interest in Large Church
- Inform the Community
- Interest prospective community
- Create demand for other area UU churches

### Techniques

#### **Development of Name**

It is recommended that an upbeat, modern name be developed for the Large Church. "Unitarian Universalist" should not be in the formal name of the church but be attached as in:

**Church of the Four Corners ...A member of the Unitarian Universalist Association.**

It is also recommended that a tag line also be developed along the lines of  
*"A community of seekers."*

#### **Identity Materials**

This is an important step. An outside design firm should be retained to assist in naming and developing a standard "look" for the church. This look will be carried in:

- Letterhead, envelopes, business cards
- Newsletters
- Website
- Signage
- Brochures and all other printed material

#### **Direct Mail**

##### **Purchase of lists**

- NPR subscribers
- Targeted lists for target area: college educated with income over \$50,000
- Church of Larger Fellowship

## Appendix IV – p. 2

### **Targeted mailings**

- Announce public forums
- Announce website
- Invite to church

### **E-Mail Notices**

In order to accommodate the wide range of interests and audiences and the necessity for rapid communications, it is recommended that a number of official email lists be used. These include:

- Area UU leaders
- Area UU ministers and religious education leaders
- Area UU Newsletters

The advantage of using email is its very low cost and the speed in which information can be distributed.

### **Print media**

Coverage for print media will take several forms, depending on the type of coverage desired:

- E-mailed news releases
- Printed and mailed news releases
- Correspondence to targeted news professionals:
  - Newspaper editors
  - Community editors
  - Social and religion editors
  - Social and religion reporters and stringers
- Press kits early in the process that will talk of plans as well as background on Unitarian Universalism, Southwestern Conference (SWUUC), North Texas Association of Unitarian Universalist Societies (NTAUUS). Some material will be from UUA at 25 Beacon in Boston.

### **Newspapers in Greater Service Area**

- *The Allen American*
- *Arlington Morning News*
- *The Dallas Morning News*
- *Plano Star Courier*
- *Dallas Observer*
- *Dallas Business Journal*
- *Dallas/Fort Worth Heritage* (monthly Christian publication)
- *Dallas Post Tribune* (Black)
- *Denton Record Chronicle*
- *Fort Worth Business Press*
- *Fort Worth Star-Telegram*
- *Fort Worth Weekly*

## Appendix IV – p. 3

- *Frisco Enterprise*
- *Lewisville News*
- *Lewisville Leader*
- *McKinney Courier-Gazette*
- *McKinney McKinney Messenger*
- *Dallas El Heraldo News (Latino)*
- *Dallas People Newspapers (Park Cities)*
- *Sherman Herald Democrat*
- *SMU The Daily Campus*
- *Park Cities People*

### **Magazines in Greater Service Area**

- *D Magazine*
- *Dallas Child Magazine*

### **Television Stations in Greater Service Area**

- |   |      |            |                 |
|---|------|------------|-----------------|
| • Dallas                                | KDAF | Channel 33 | Warner Brothers |
| • Dallas                                | KDFW | Channel 4  | Fox             |
| • Dallas                                | KTVT | Channel 11 | CBS             |
| • Dallas                                | KTKA | Channel 21 | UPN             |
| • Dallas                                | KXAS | Channel 5  | NBC             |
| • Dallas                                | WFAA | Channel 8  | ABC             |
| • Sherman                               | KTEN | Channel 10 | NBC             |
| • Sherman                               | KXII | Channel 12 | CBS             |
| • Dallas                                | KERA | Channel 13 | PBS             |
| • All public access television stations |      |            |                 |

### **Radio Stations**

#### **Dallas**

- **KDGE** 102.1 FM Alternative
- **KDMX** 102.9 FM Adult Contemporary
- **KEGL** 97.1 FM Rock
- **KHKS** 106.1 FM Top 40
- **KHYI** 95.3 FM Country
- **KKDA** 730 AM Urban Adult Contemporary
- **KKDA** 104.5 FM Urban
- **KKMR** 93.3 FM Alternative
- **KLIF** 570 AM Talk
- **KLUV** 98.7 FM Oldies
- **KMEO** 96.7 FM Oldies
- **KPLX** 99.5 FM Country
- **KRLD** 1080 AM News, Talk, Sports
- **KRNB** 105.7 FM Urban Adult Contemporary

## **Appendix IV – p. 4**

- **KSCS** 96.3 FM Country
- **KTCK** 1310 AM Sports
- **KTXO** 94.5 FM Jammin Oldies
- **KVIL** 103.7 FM Adult Contemporary
- **KYNG** 105.3 FM Talk
- **KZPS** 92.5 FM Classic Rock
- **WBAP** 820 AM News, Talk, Sports
- **WRR** 101.1 FM Classical

## **Large Church Website**

### **Domain Name**

The domain should reflect the name of the church.

### **Functions**

Overview of the Large Church  
Status of large church (land found, contacts for design and construction, building, dedication)  
Staff – including profiles  
Program descriptions and contacts  
Calendar/Timetable  
News releases  
PDF files of all promo material  
Links to other area UU churches  
Links to UUA  
Interest/Feedback/comment form  
Contribution form  
Map and directions to site  
Info on public forum  
Opportunities to volunteer  
Community outreach

## **Educate the local UU Community**

### **Info for area UU churches**

Starting with the formal kick-off of the project, all UU churches in the cluster, should regularly be informed of what is happening and who is involved. Initially, the list would include:

- Ministers
- Religious Education Leaders
- Growth Leaders
- Outreach Leaders
- Newsletter Editors

## **Timetable of marketing efforts**

### **Prior to kick off**

Develop new media mailing lists (contact, type, media, mailing address, telephone, fax and email)  
Contact community and religion editors personally and start dialog  
Distribute UUA briefing packet to religion editors

## Appendix IV – p. 5

Meet with leaders and congregations in all Metroplex UU societies

### **At kick off**

Develop and print overview of new church profile

Develop and distribute media kit

Develop website

### **One year prior to opening doors**

Start public forums

Register attendees. Capture info for databases

Send news releases to all media

Send notices to all area UUs

Issue periodic news releases and PSAs to all area media and local UU newsletters

#### New Church facility

- Selection of architect
- Selection of architect
- Groundbreaking

#### Staff

- Minister
- Religious Education
- Music

#### Programs

- Adult education programs
- Public forums
- Targeted participation by UUs in area programs and events

Start public television production

Direct mail to target areas, include (at least 2 mailings)

NPR subscribers in service area

Individuals in service area fitting profile

### **Six Months prior to opening doors**

- Regular news releases
- Increased direct mail activities
- On site events
- Upgrade websites
- Staff visits area churches
- Use of area billboards: “There is a new alternative coming...”

### **At opening**

- Special invitations
- More public forums
- Special celebrations
- Grand opening celebration news releases
- Meetings/briefings with targeted editors/reporters
- Initiate weekly notifications to news media
- Community Outreach projects

### Marketing Budget

|   |  |                    |
|---|--|--------------------|
| “Corporate” (church)<br>Identity Material | Marketing agency                           | \$5,000 - \$10,000 |
| Direct mail lists                         | List brokers<br>\$100-\$150/1,000<br>names | \$20,000           |
| Mailing expenses                          | Mail houses                                | \$20,000           |
| Website – hosting plus<br>email           | 2 years @ 500                              | \$1,000            |
| Marketing materials<br>(Includes mailers) | Production and<br>printing                 | \$ 25,000          |
| Signage at site                           |  | \$ 7,500           |
| Billboards                                |  | \$ 7,500           |

## Appendix V

### Recommendations for Risk Mitigation/Due Diligence Land Acquisition Task Force

The following is a checklist of items that should be assessed in determining the feasibility (risk assessment) of any site as to its suitability for use as a church facility. These items should be considered as part of due diligence prior to purchase.

**Project Summary:**

- Property Description
  - Legal Descriptions
  - Vicinity Map
  - Site Survey/Plat
- Site Development Information (including preliminary site concept plan)

**Project Description:**

- Ownership
- Site Topography
- Physical Improvements
- Phase I Environmental Report
- Soils Report
- Existing Land Use and Zoning
- Surrounding Uses
- Proposed Site Development
  - Site Plans (Indicating Phased Development)
  - Preliminary Grading Plan
- Code Mandated Project Restraints
- Declarations, Covenants, Conditions and Restrictions

**Preliminary Project Schedule:**

**Preliminary Site Cost Estimate:**

**List of Contacts and Regulatory Agencies:**

- Planning Department
- Building Department
- Health Department
- Fire Department
- Utility Companies
- Storm Drainage Retention/Wetlands Protection
- Traffic Signalization/Access Dedications/Bonds

## Appendix VI

### History of other Growth Campaigns in Metroplex\*

In the early 90's, the Unitarian Universalist Association initiated a growth campaign in the Metroplex promoting "The Religion that puts its Faith in You". Deb Weiner was the contact and coordinator from Boston on the project.

The UUA provided significant funding but NTAUUS contributed also.

The nature of the campaign was as follows. UUA and NTAUUS undertook substantial advertising on NPR and KERA explaining and promoting the Unitarian Universalist approach to religion. The advertising encouraged respondents to call a phone number for further information. The Metroplex Minister Rev. Cynthia Johnson (a position funded by First Unitarian of Dallas and NTAUUS) responded to the calls. Her primary duty in that was to answer questions and inform the caller of the nearest UU Fellowship or Church. She also provided the lead to whichever Fellowship or Church was appropriate. Representatives of the various churches and fellowships were trained in the nature, purpose, and importance of follow-up for the Campaign.

Marty Robinson, interviewed for this write-up, asserts that the campaign "raised our profile somewhat" and that "we got some visitors off the campaign".

Certain limitations seem apparent. While individual societies may have appropriately sent workers to be trained about responding, the campaign required no real commitment from the congregations. There was no expectation of changes in staffing, facilities, or programs at the individual congregations to take advantage of the leads generated. Further, the campaign was externally generated and applied to all congregations. As such, some of the leads generated fell upon unmotivated organizations with little zeal for responding to the windfall of freely created member candidates.

\*Marty Robinson supplied most of the facts for this summary, and, as best possible her conclusions have been represented. But, in no way has she endorsed this summary.

## Appendix VII

### Summary of Growth Consultant's Activity in North Texas January, 2000-June, 2002

**The Growth Consultant has been involved with a variety of activities since her appointment. A sampling follows.**

- The Growth Consultant has spoken at District Conferences.
- She has conducted a Leadership Retreat for First Jefferson UU Church, Fort Worth, as well as another weekend workshop addressing general need and concerns.
- She has consulted through three visits to Community Church, Plano.
- The Red River UU Church, Sherman, TX, has utilized her twice.
- The Westside Church in Fort Worth utilized the Growth Consultant for questions surrounding their Ministerial Search as related to growth issues.
- The Growth Consultant has conducted a weekend workshop for the UU Fellowship of Dallas (Oak Cliff).
- There have been numerous individual and informal consultations.

Appendix VIII

Growth Consultant Program Application  
Southwestern UU Conference

(space for replies edited)

Congregation Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Meets at \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Contact Person \_\_\_\_\_

Address \_\_\_\_\_

Phone (home) \_\_\_\_\_ Phone (work) \_\_\_\_\_

E-mail \_\_\_\_\_ Position \_\_\_\_\_

Do you now have a committee/task force responsible  
for growth/outreach activities? \_\_\_\_\_ Yes \_\_\_\_\_ No

Have church members participated in SWUUC or  
UUA growth workshops? \_\_\_\_\_ Yes \_\_\_\_\_ No

**Affirmations**

We acknowledge that:

- a. \_\_\_\_\_ The congregation is in general agreement about the need to actively promote the growth of the church/fellowship.
- b. \_\_\_\_\_ If we do not now have a committee/task force specifically responsible we will form one prior to entering the program.
- c. \_\_\_\_\_ We will provide a financial contribution to help defray the costs of a consultant as outlined in the program guidelines.
- d. \_\_\_\_\_ We will continue active growth activities for at least one year after the end of the consultations.

If the above four statements are checked, then proceed to complete the following application. Many questions herein call for extended narrative answers. Please attach those answers to the end of the questionnaire with responses keyed to page and question.

Appendix VIII – p. 2

Survey of Congregational History, Needs, and Goals

Growth Trends, History, and Goals

|  | <u>Current</u> | <u>1 yr. Ago</u> | <u>2 yrs</u> | <u>5 yrs</u> | <u>2-yr. Goal</u> |
|--|----------------|------------------|--------------|--------------|-------------------|
| Membership   | .....          | .....            | .....        | .....        | .....             |
| Average Worship Attendance                         | .....          | .....            | .....        | .....        | .....             |
| # of Pledging Units                                | .....          | .....            | .....        | .....        | .....             |
| Average Pledge                                     | .....          | .....            | .....        | .....        | .....             |
| Total Budget                                       | .....          | .....            | .....        | .....        | .....             |
| Actual Expenditures                                | .....          | .....            | .....        | .....        | .....             |
| Endowment  | .....          | .....            | .....        | .....        | .....             |
| # of children registered<br>(Nursery through YRUU) | .....          | .....            | .....        | .....        | .....             |
| Average attendance --<br>Nursery through YRUU      | .....          | .....            | .....        | .....        | .....             |
| Average number of visitors                         | .....          | .....            | .....        | .....        | .....             |
| # New Members                                      | .....          | .....            | .....        | .....        | .....             |
| # Members Resigned                                 | .....          | .....            | .....        | .....        | .....             |
| # Members Died                                     | .....          | .....            | .....        | .....        | .....             |
| # Members Removed                                  | .....          | .....            | .....        | .....        | .....             |
| Year congregation was founded _____                |                |                  |              |              |                   |

Has your congregation been larger than it is currently? When? What happened?

**Mission and Planning**

- I. Why do you want to participate in the Growth Consultant Program?
- II. Do you have a mission statement? \_\_\_\_ Year last reviewed/revised \_\_\_\_ Please attach.  
How does congregational growth relate to your mission?

Appendix VIII – p. 3

**III. Do you have a vision statement?** \_\_\_\_\_ Year last reviewed/revised \_\_\_\_\_

Please attach.

How does congregational growth relate to your vision statement?

**IV. Do you have a long-range plan?** \_\_\_\_\_ Year last reviewed/revised \_\_\_\_\_

Please attach.

What are the key elements of your long-range plan?

How does congregational growth relate to your long-range plan?

**V. Why is now a good time for growth in your congregation?**

**VI. What do you see as the major factor(s) keeping you from growing as you would like to at this time?**

**Area Demographics/Community Relations**

**I. From which towns, cities, and/or communities do you draw?**

| <u>Place</u> | <u>Population</u> | <u>Growing or Declining?</u> | <u>Distance From<br/>Your Church</u> |
|--------------|-------------------|------------------------------|--------------------------------------|
|--------------|-------------------|------------------------------|--------------------------------------|

**II. What are the over-all population trends in your area?**

|                            |                           |
|----------------------------|---------------------------|
| _____ Growing population   | _____ Static population   |
| _____ Declining population | _____ Changing population |

**III. Describe the racial and ethnic mix in your area.** Is it static or changing? To what extent does your congregation reflect the mix of your area?

**IV. Community Outreach**

Describe your social action projects.

What groups in the community do you have relations with? Include those you rent to or from; those you are a member of; those with which you work cooperatively.

**Indicators of Excellence**

**I. Current staffing pattern.**

List all your paid staff and the amount of time they work: (e.g., DRE half time (20 hrs/wk); Custodian 10 hr/wk; Minister fulltime). Include part-time staff with small stipends (e.g., intern minister, nursery supervisor, YRUU advisor).

How long have you had this staffing pattern?

## Appendix VIII – p. 4

List the last five ministers who have served your congregation, with their dates of service and title. Include consulting ministers, student ministers, and any minister with an on-going agreement to serve your congregation.

Is your current staffing adequate to meet your current needs?  
What changes are you considering?

### **II. Worship Service time(s)**

Attach a typical order of service.

Describe the worship style of the congregation.

### **III. Children's Religious Education**

Time(s)

# of classes

Attach an RE brochure and/or describe your congregation's philosophy and structure of religious education in an attachment.

### **IV. Significant relational groups.**

Relational groups include covenant groups, but may be any group in the congregation that takes care of its members and has members who identify strongly with the group. Examples may include geographically-based groups, interest groups, men's and women's groups, etc. (NOT committees)

List the significant relational groups in your congregation, with numbers of members.

How are relational groups established, expanded, and ended?

### **V. Describe any other significant programs your congregation offers.**

### **VI. Attach a typical calendar of events, a newsletter, and a current detailed budget.**

#### Facility

#### **I. Building Size. List square footage & capacity (that is, how many people does it accommodate?):**

|                 | Sq. feet | Capacity |
|-----------------|----------|----------|
| Sanctuary       |          |          |
| RE classrooms   |          |          |
| Office(s)       |          |          |
| Fellowship Hall |          |          |
| Other           |          |          |
| Total           |          |          |

Appendix VIII – p. 5

**II. Building is**

fully handicap accessible, including all bathrooms  
 partially handicap accessible  not handicap accessible

**III. Grounds.**

Amount of acreage \_\_\_\_\_ Parking capacity \_\_\_\_\_

Describe signage on site and leading to site.

Describe grounds.

**IV. Location is**

on major thoroughfare  isolated  downtown  
 in residential neighborhood  on bus line  rural/suburban  
 other; describe

**V. Is the facility adequate to meet your current needs?**

What changes or improvements have you made in the last five years?  
What changes are you considering?

**Structures**

**I. Describe your governance structures. Attach by-laws.**

**II. List your committees and provide a one-sentence description of their responsibilities.**

**III. How do you recruit volunteers?**

**IV. How does staff relate to the Board? To volunteers?**

**Member Assimilation**

**I. Recruitment and Advertising**

Check those techniques you use:

- |   |   |
|---|---|
| <input type="checkbox"/> Yellow pages listing                                     | <input type="checkbox"/> Visitation program                     |
| <input type="checkbox"/> Yellow pages ad  | <input type="checkbox"/> Direct mail                            |
| <input type="checkbox"/> Weekly religion page listing                             | <input type="checkbox"/> Community presence                     |
| <input type="checkbox"/> Weekly religion page ad                                  | <input type="checkbox"/> Radio ads                              |
| <input type="checkbox"/> Weekly newspaper advertising,<br>not in religion section | <input type="checkbox"/> TV ads                                 |
| <input type="checkbox"/> Web-site (Address: _____)                                | <input type="checkbox"/> Building use by outside groups         |
| <input type="checkbox"/> Newsletter (Frequency: _____)                            | <input type="checkbox"/> Bring a Friend Sunday                  |
| <input type="checkbox"/> Regular press releases                                   | <input type="checkbox"/> Training for members to invite friends |
| <input type="checkbox"/> Occasional press releases                                | <input type="checkbox"/> Other (describe: _____)                |
| <input type="checkbox"/> Billboards   |   |

Appendix VIII – p. 6

**II. How many people visit your services annually?**

**III. How do you welcome newcomers?**

**IV. Describe how you welcome new members and integrate them into the congregation.**

**Growth Committee or Task Force**

**I. What group or committee in your congregation is/will be responsible for monitoring of your growth plan?**

List members of that group.

**II. How will the Board, congregation, committees, and staff interact with the group?**

**III. Is the membership committed to growth? Explain how you measured that.**

**IV. Financial Resources**

What amount of financial resources have you projected for implementation of This growth plan? What amount is the congregation committed to providing?

Submitted by \_\_\_\_\_ Date \_\_\_\_\_

*This survey, part of the Small to Midsize Growth Task Force Report, represents the work of Rev. Jonalu Johnstone 1108 NW 29<sup>th</sup> St., Oklahoma City, OK 73106*