

# UUCGV Long Term Planning Report

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Submitted to the Board of Trustees  
by John Mayo  
on behalf of the Long Term Planning Team

December 4, 2017

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## Report Overview

The UUCGV Board of Trustees (“Board”) in April, 2017 established a Long Term Planning Team (“the Team”) and requested that the Team consider a set of 5 questions:

*Using 2014 – 2016 Statistics in Sunday service attendance, membership levels, and financial support (pledge levels, fundraising activities and annual budgets), please project growth for the next 5 years and assess the impact on the following:*

- 1. Facility Use – what is our capacity for the sanctuary, and what options are available if we outgrow that capacity?*
- 2. Programming – how will growth affect our current programming, particular our RE programs? Will growth place more strain on our volunteers and their capacity to manage programs?*
- 3. Staffing – if we assume greater levels of participation from attendees and members, what stresses will this place on our staff and Minister?*
- 4. Finances – managing growth in advance of increases in financial resources is one of the greatest challenges for small organizations. How will we meet our financial obligations? What are some financial opportunities we have not identified?*
- 5. Congregational Cohesion – How will growth affect member’s relationships with each other as they see more unfamiliar faces around them?*

Following initial Team discussions, the Team decided to expand the scope of work to include the following area:

6. An examination of the general functioning of all areas of the church – it’s staff, elected bodies, volunteer teams, and program areas – to assess whether these areas are working well or need improvement in their operations and interactions with each other.

### Composition of Long Term Planning Team

The Team consists of John Mayo (Team Leader), Jan Hyland, Tim O’Brien, and Herb Feinzig. Chris Coolidge was also member for the first several months.

Church members who were interviewed: Rev. Wendy Jones, Mallory Rice, Robert McDonald, Peg Oswald, Gary Poush, Penny Youngren, Richard Hyland, Shari Daly-Miller, Bill Hilty, and Janet Cummings. The Team has met for about 2 hours at least every 2 weeks from May thru November, 2017. We have had wide ranging discussions among the team members, as well as interviews with the guests listed above.

### How to Read This Report

1. First, read the [Summary of Findings & Recommendations](#) on pages 8 through 31.
2. Second, the background is given for all recommendations in the [Details of Team Findings](#) section. Especially important is the [Financial Analysis and Projections](#) section.
3. Third, several [Appendices](#) give further background and reference information.

# Summary of Findings & Recommendations

This section gives a summary of the Team's recommendations. Each recommendation is discussed in detail later under [Details of Team Findings](#).

## Church Size & Growth

According to Rev. Wendy, the church is transitioning from a Family size church to a Pastoral size church. The UUA website discusses church size at

<https://www.uua.org/documents/congservices/sizetransitions.pdf> A Pastoral church requires the Minister to be the nexus of communications between multiple small networks of the congregation. A Pastoral church relies on staff to carry out more of the functions of the church. A downside of relying on church staff is that fewer people may be willing to become volunteers since they assume that the staff is handling everything.

Over the next 5 years, the Team projects that there will be shortfalls in income unless the church grows its membership and increases the amounts of existing pledges. The key to successful growth is to build a quality church program that retains existing members and is attractive to new visitors. In particular, the worship services and the Religious Education programs must function at a high level. This will lead to stable long-term growth, not just additional members who may not stay with us.

### Church Size & Growth Recommendations:

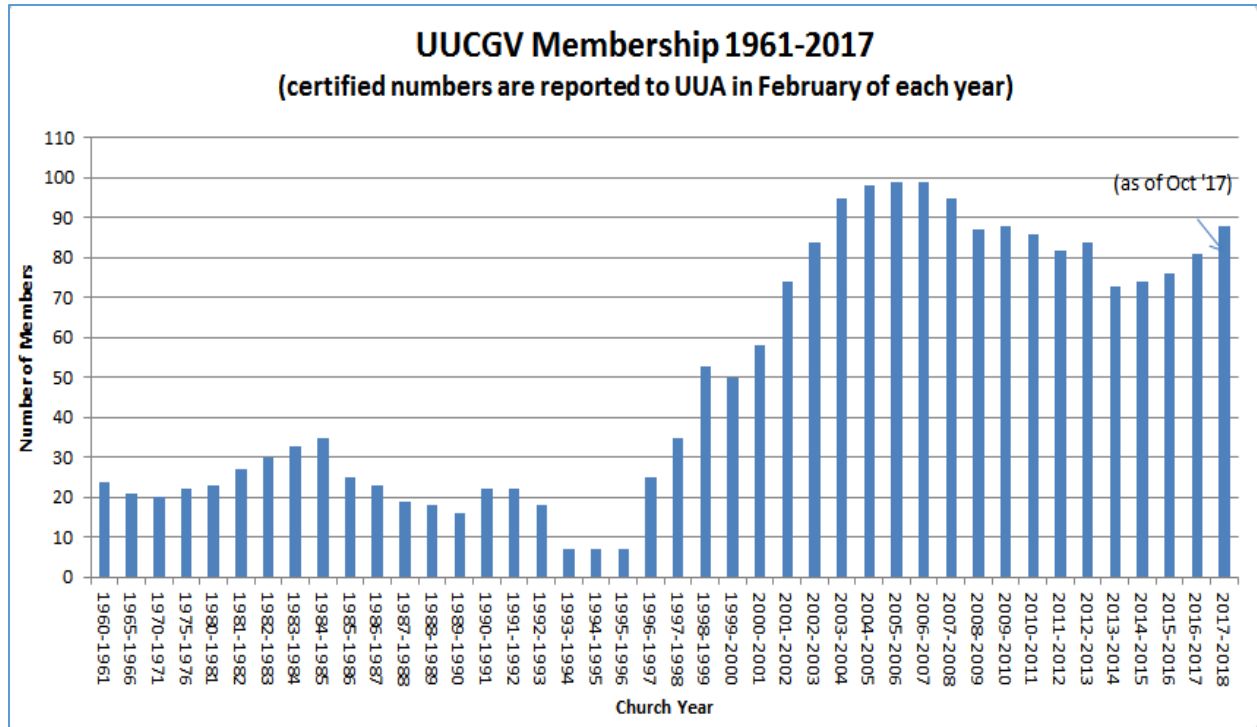
1. The congregation should be taught about the size changes taking place in our congregation so that they understand new ways that the church is functioning.
2. Focus on the quality of our programs - especially worship services and RE. If we deliver quality programming, visitors will be more likely to join the congregation once they find us.
3. The Membership Team and Stewardship Team must function consistently at a high level to attract and retain new pledging members.
4. For additional ideas on attracting new members, see Appendix 4: *Nine Surprising Patterns in Growing Churches*

## Membership

Membership as of October, 2017 stands at 88 members. We will begin paying our building mortgage starting July 1, 2018. This will result in budget shortfalls over the next 5 years, unless steps are taken to increase our income and control our expenses. The [Financial Analysis & Projection section](#) will demonstrate that both more members and increased pledge levels from existing members will be needed in each of the coming 5 years to insure the financial stability of the church.

The chart below (figure 1) shows the historic church membership from 1960 to present:





To balance future budgets, the Team projects that 44 new members making typical pledges will be needed by 2020-21. This implies a total membership by 2020-21 of 132 members. For a detailed discussion of historic and projected membership numbers, see the section [Membership and Attendance Data](#).

To gain the necessary additional members, it is imperative that visitors be contacted by the Membership Team with a goal of meeting their needs and encouraging them to become successful members and volunteers in our congregation. One of the primary ways we met the needs of new members is to have a vigorous and successful Religious Education program. Families with children will be looking for a good RE program.

#### Membership Recommendations:

1. Insure the Membership Team is functioning at a consistently high level. We need to greet all visitors and follow up with them to encourage their becoming pledging members and volunteers. By volunteering, new people will become acquainted with existing members and with the programs of the church. By pledging, we will insure the financial stability of the church.
2. The Stewardship Team must coordinate with the Membership Team to establish pledges with the new members.
3. Create a brochure and a section on the website explaining “How to Join Our Church” similar to that used by the First Congregational Church.
4. Continue providing social settings like the Wednesday night social gathering that helps integrate visitors and new members into the congregation.
5. Have a effective volunteer recruiting program, led by the LDT, that finds successful volunteer positions for new members.

## Comparisons of UUCGV with other Mountain Desert District (MDD) Congregations

We are typical of MDD congregations of similar size (50 to 150 members), but there are several differences that stand out. (See the section [Comparisons of UUCGV with Other MDD Congregations](#) for more details).

First, we have a large number of friends of the congregation (several hundred), which is far more than any other congregation of our size. Friends are people who associate informally with the church but have not signed the membership book and are thus not expected to make a pledge. We make a distinction between old friends (we maintain contact with them) and active friends (people who attend some functions and may make pledges). Some friends of the UUCGV make substantial pledges to the church. The disadvantage of having lots of friends is that we lose their commitment to make pledges and to become active volunteers. On the other hand, we save money by not having to pay MDD and UUA dues for these friends.

Second, our percentage of members for our population area is below average. This implies that we have growth potential in the Grand Valley. And third, we rely on fewer pledges that are larger on average than pledges at our sister churches.

MDD Comparison Recommendations:

1. Broaden our pledging to include more average size pledges so we are not so dependent on a few large pledges for our income.
2. Find ways to encourage friends to become members and volunteers.
3. Reach out to the Grand Valley population to attract new members.

## Financial Analysis and Projections

We will need to start paying our mortgage in the 2018-19 church year, according to the church Treasurer. Therefore, at our current level of membership and giving, we will experience budget shortfalls ranging from about \$14,000 in 2018-19, to about \$34,000 in 2020-21. We will need to add this much income and/or cut this much in expenses to have a balanced budget. It will be very difficult to cut that much in expenses, so the bulk of the shortfall will have to be met by increased income. The reader is encouraged to see the more detailed discussion of these goals, with numerous charts, in the section [Financial Analysis & Projections](#).

## Financial Recommendations

Realizing that the vast majority of our income comes from member pledges and Sunday morning offerings, the Team recommends that the church explore all possible methods of increasing our income, by setting these financial goals:

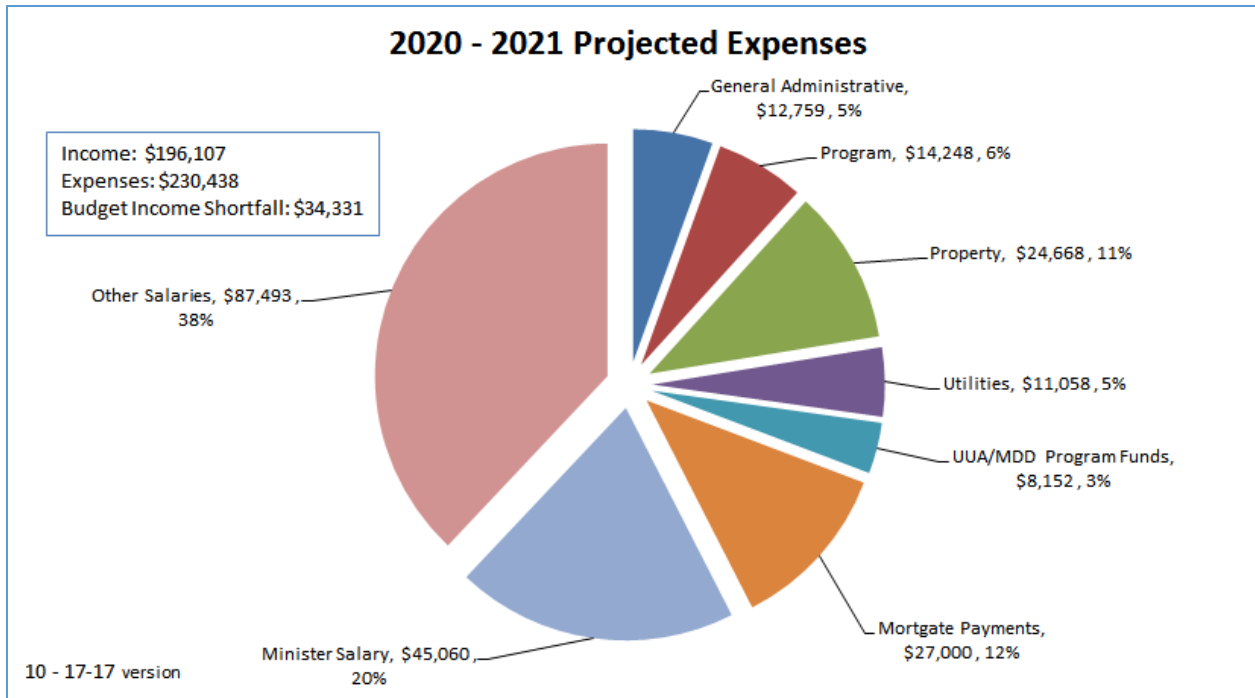
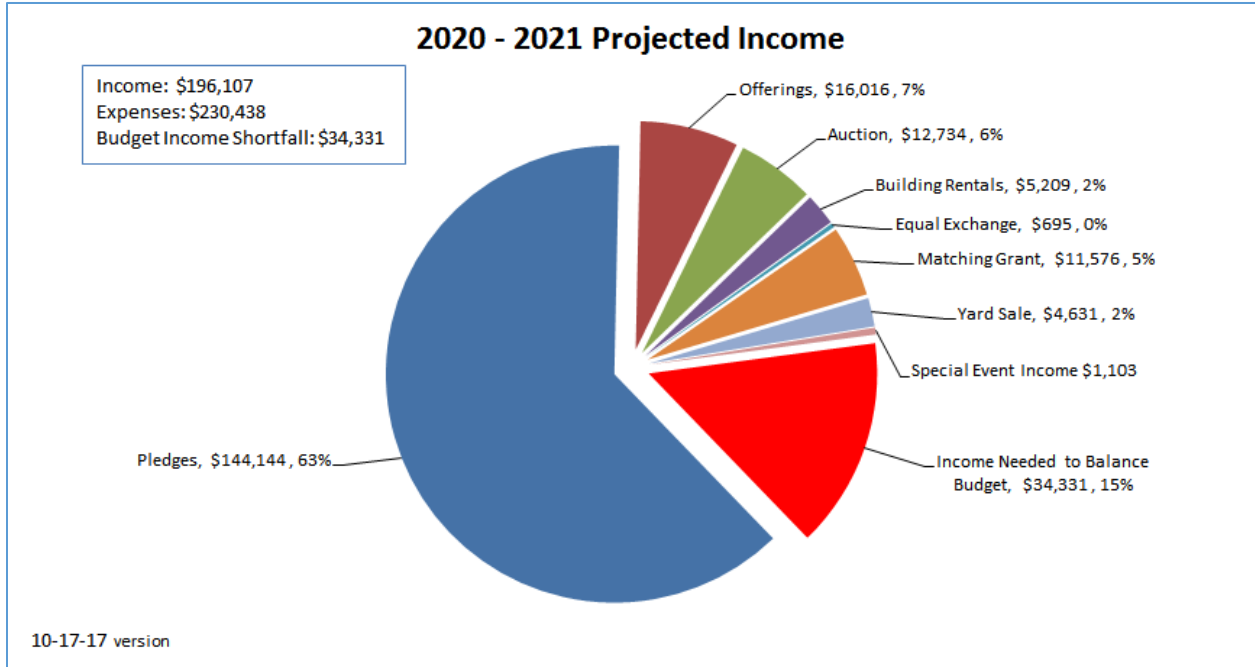
1. It is imperative that the congregation understand the financial realities facing the church, and this will require careful and clear communications from the church leadership to the members and friends. This will need to be a continuing effort each year as our financial position evolves.
2. To maintain a balanced budget, we must add approximately 44 new pledging members by the 2020-21 church year (over the current level of 88 members), and maintain this level through the 2022-23 church year (see figure 28 and table 1). To accomplish this, we need to enhance the

quality and relevance of our overall program in every area to attract and retain new members. We must insure that the Membership Team and Stewardship Team follow up on all new visitors.

3. Increase pledge giving from existing members and friends substantially where ever possible. The financial projections in this report assume an across the board average of 5% year on year. The Stewardship Team says that this may be an unrealistic goal, as people aren't willing to increase their pledge this often.
4. Broaden our pledge giving to not rely on a few very large pledges for a significant part of our income. The Top 3 pledges currently make up 46% of our pledge income.
5. Increase the results from fund raising efforts. Over the next 5 years, strive for an increase in auction proceeds by 5% year over year, and yard sale proceeds by 5% year over year.
6. The 2017-18 level of building rental activity is as much as the staff and church schedule can handle. To gain more income from rentals, we will need to raise our rental rates by an average of 5% a year. We should explore establishing a Building Rental Team (or a volunteer) to assist Mallory and Sterling with building rentals to reduce the administrative and labor cost of rentals.
7. Add special fund raising events, such as music series and guest speakers, and create a new Special Events Team to manage these events. We should strive for a minimum of \$1500 in Special Event income for 2018-19, and increase that by 10% year over year through 2022-23.
8. Establish a capital project funding system by encouraging gifting through congregant estate planning. Create an endowment fund for the future of the church with a goal of \$500,000.
9. Manage our expenses by relying on volunteers wherever possible to make the existing staff as efficient as possible, to avoid needing to add more staff persons and more staff hours. The projection is that staff and Minister's salaries will increase by 2.5% annually, and a new staff salary of \$10,000 will be added in 2018-19 for a student intern Minister. The church should strive to offer competitive salaries wherever possible, and provide merit increases where justified.

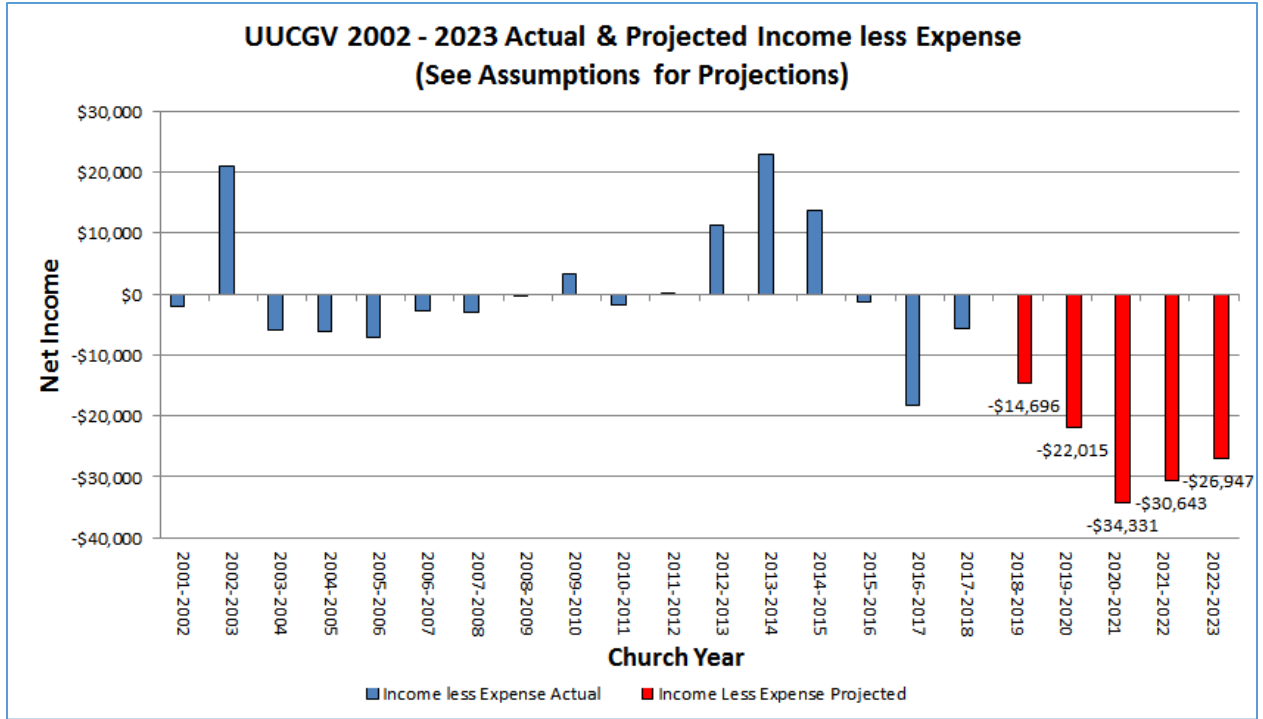
#### [Income & Expense Pie Charts for Church Year 2020-2021](#)

The next two charts (Figures 16 & 17) show the income and expenses from the Fiscal Year 21 (July 1, 2020 thru June 30, 2021) projected budget. Note the red slice on the Income Chart that shows that there is a projected shortfall of \$34,331 in income. This is due mainly to the assumption that the 536 Ouray mortgage payment of \$27,500 will be due in full for that year.



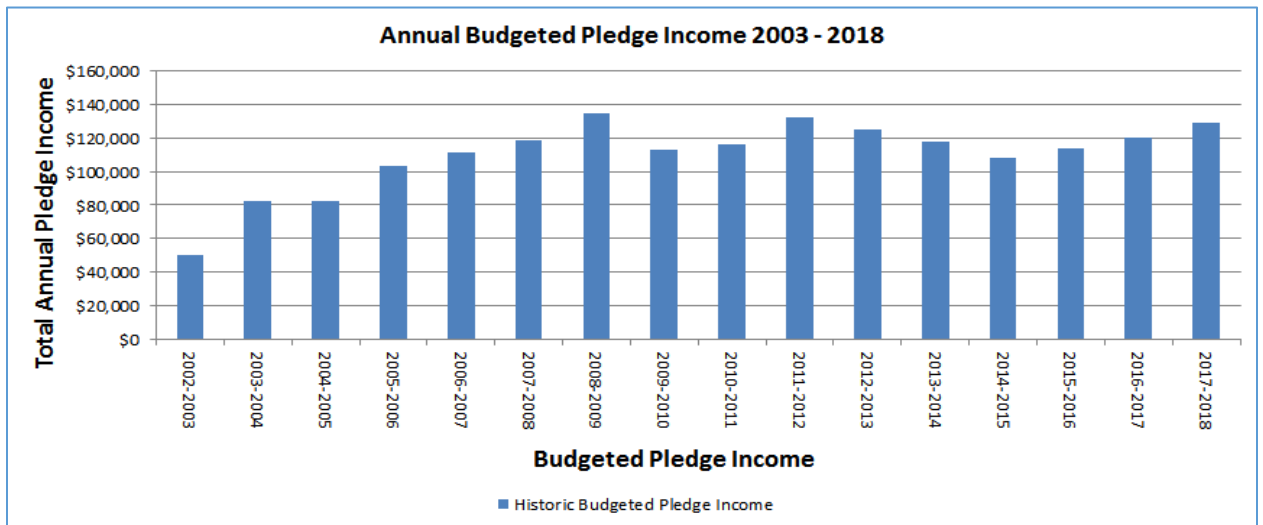
#### Income & Expense Shortfall Projections

The next chart (figure 18) shows income less expenses from 2001-02 through 2017-18, with projected income less expense values for 2018-19 through 2022-23. This chart assumes that the full 536 Ouray mortgage will be payable starting in 2018-19, and also assumes that membership growth will follow the current very gradual trend up to 104 members by 2023. There are reserves set aside for the full mortgage payment of \$27,500 in 2018-19, and \$16,000 set aside for 2019-20, so the full impact of the mortgage payment hits in 2020-21.

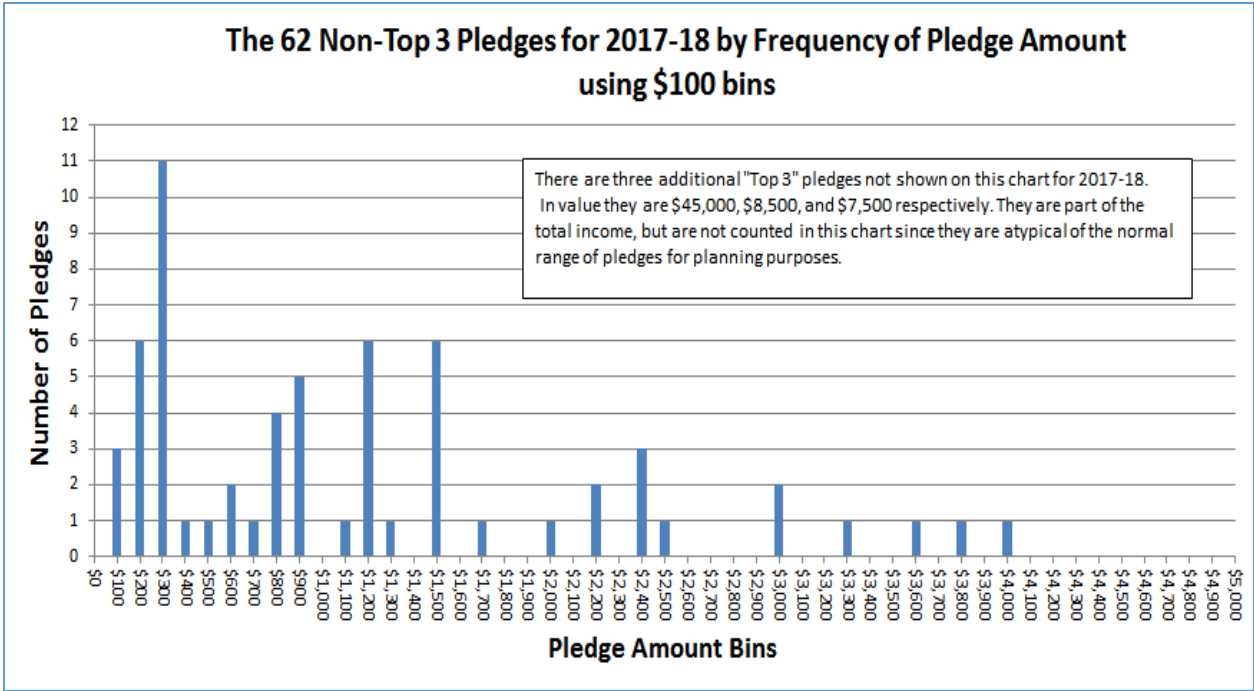


#### Pledge & Offering Income

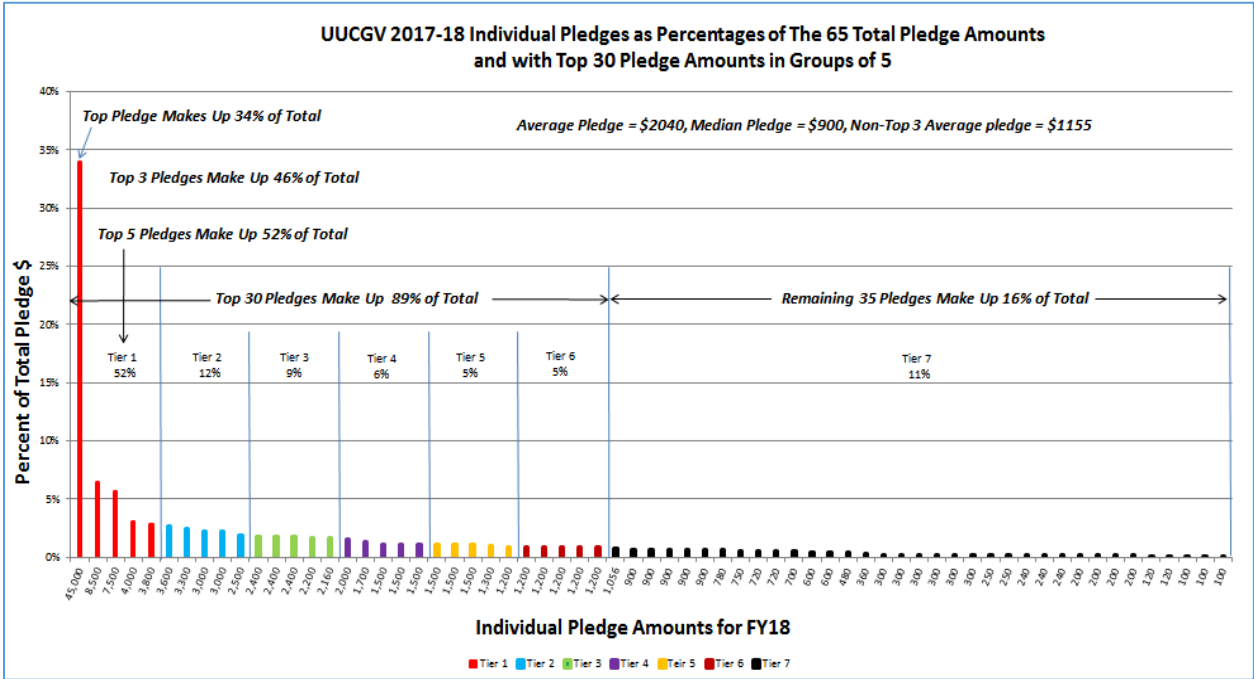
The Next chart (figure 20) shows historic pledge income from fiscal year 03 to the current fiscal year. It can be seen that pledge income trended down from FY12 to FY15, but has now begun trending upward again.



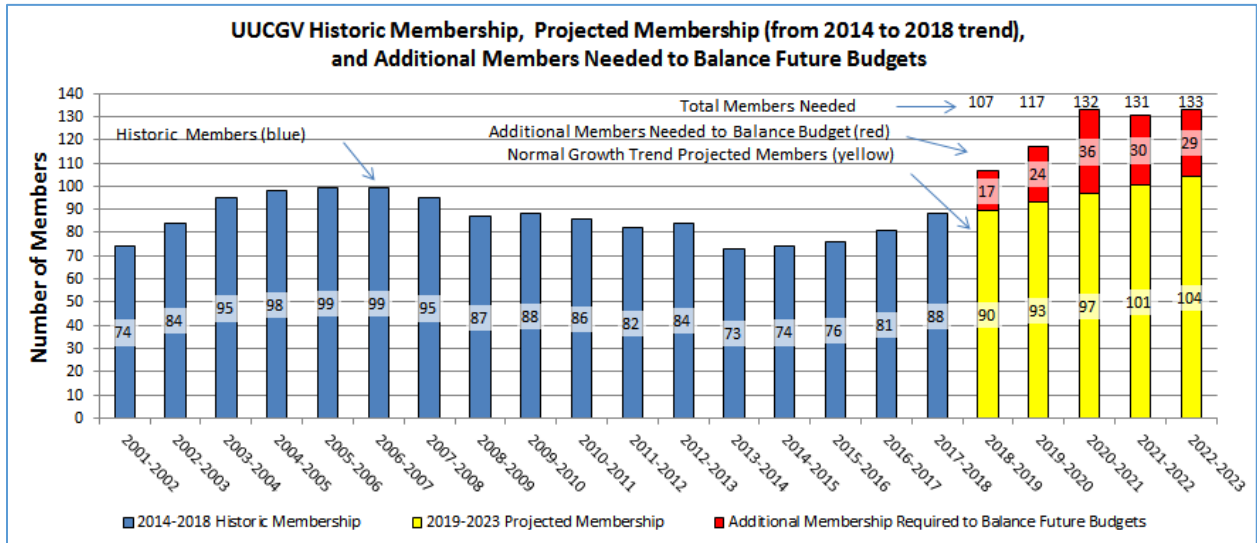
The next chart (figure 24) shows the distribution of the non-top 3 pledges. For example, the first blue bar shows that there were 3 pledges between \$100 and \$200. The Top-3 pledges for 2017 are \$45,000, \$8,500, and \$7,500. Including them on this chart would make the chart too wide to print!



The following chart (Figure 25) shows the contribution to the overall 2017-18 income of the church by the various pledge amounts as percentages of total pledge income for the current fiscal year, July 1, 2017 thru June 30, 2018. The top single pledge (\$45,000) makes up 34% of the total income of the church. The top 3 pledges make up 46% of the \$132,586 in pledge income for the year. The top 5 pledges make up 52% of the total income. The top 30 pledges make up 89% of total income, while the remaining 35 pledges make up 11% of total income

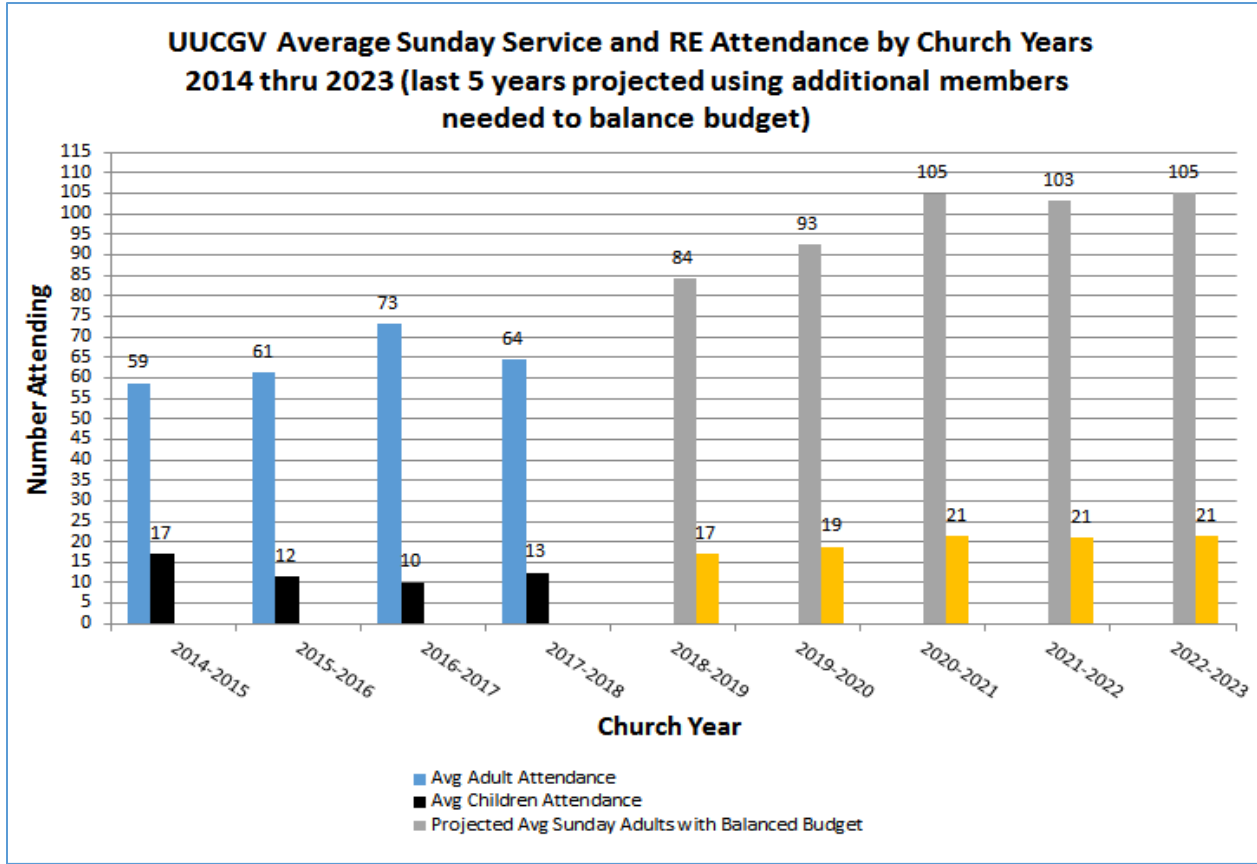


The next chart (figure 27) shows the historic membership from church year 2001-02 to 2017-18. The Trend projected membership numbers (show in yellow bars) are based on the “normal” trend in membership growth from 2013-14 to 2017-18 numbers. The additional members (show in red bars) needed to balance future budgets (2018 through 2023) are calculated using the same pledge distribution technique as shown in figure 26 (below) for each future year. This value excludes the top 3 pledge values. The values and assumptions for these charts are given in the summary table in Appendix 4 at the end of this report.



**Attendance Implications of Adding Members to Balance the Budget**

The next chart (figure 28) shows actual average adult and RE attendance on Sundays from 2014-15 to 2017-18, along with projections of Sunday Service attendance and RE attendance for the next 5 years. The assumption is that 44 new members will be added to balance the budget in the next 5 years. It can be seen that Adult Sunday average attendance starting in 2020-21 potentially exceeds the fire code occupancy limits for the sanctuary, depending on the occupancy numbers on the chancel (32 persons maximum) and on the main sanctuary area (93 persons maximum). This creates the possibility of needing to have 2 worship services starting in 2020-21. See [Seven Possible Options for Two Services](#) for a discussion of various scenarios of how 2 worship services could be accomplished. The Team is recommending that the Worship Team start to make separate counts of people in the chancel area, the main sanctuary floor, and the kitchen area, which is allowed to hold 13 seated persons maximum in a overload situation (with no tables set up).



**Non-Pledge Income**

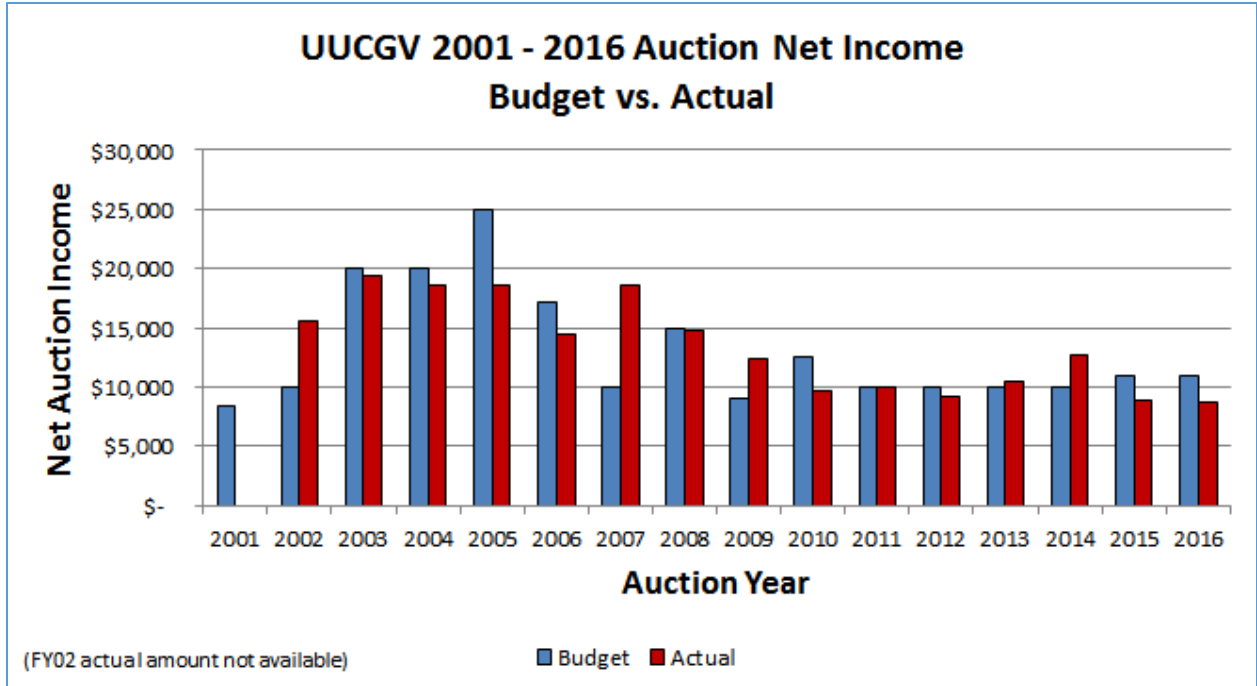
**Auction**

Auction net income is an important component of total income for the church, representing \$11,000 (6%) of the budgeted income for 2017-2018. There are two differing opinions about using the auction to fund the operating budget of the church. One opinion is that the auction should be part of the operating budget income, but others feel that the auction should not be relied on as part of the operating budget.

The argument against including auction proceeds in the budget appears to be that we could do more for community causes if we could donate all the auction money to the community. But with a projected income shortfall in the next 5 years, it is likely that including auction income in the operating budget will continue to be necessary. The next chart (figure 29) shows historic auction income, budgeted vs. actual, since 2001. Auction results for 2017 were not available at the time of this writing.

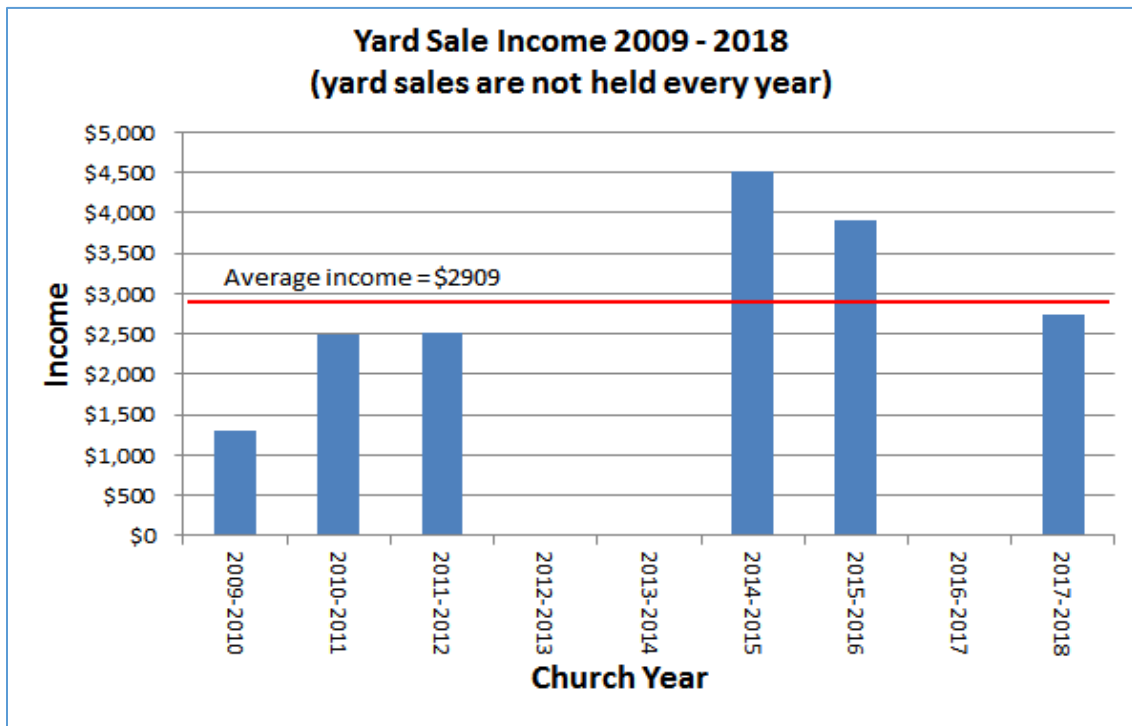
The chart below (figure 29) shows that actual net auction income since 2009 has declined from historic net yields. This would suggest that a more robust approach to the auction is needed to yield higher net incomes. Auction results for 2017 were not available at the time of this writing, but preliminary estimates are that the 2017 net income exceeded the budgeted amount.





*Yard Sale*

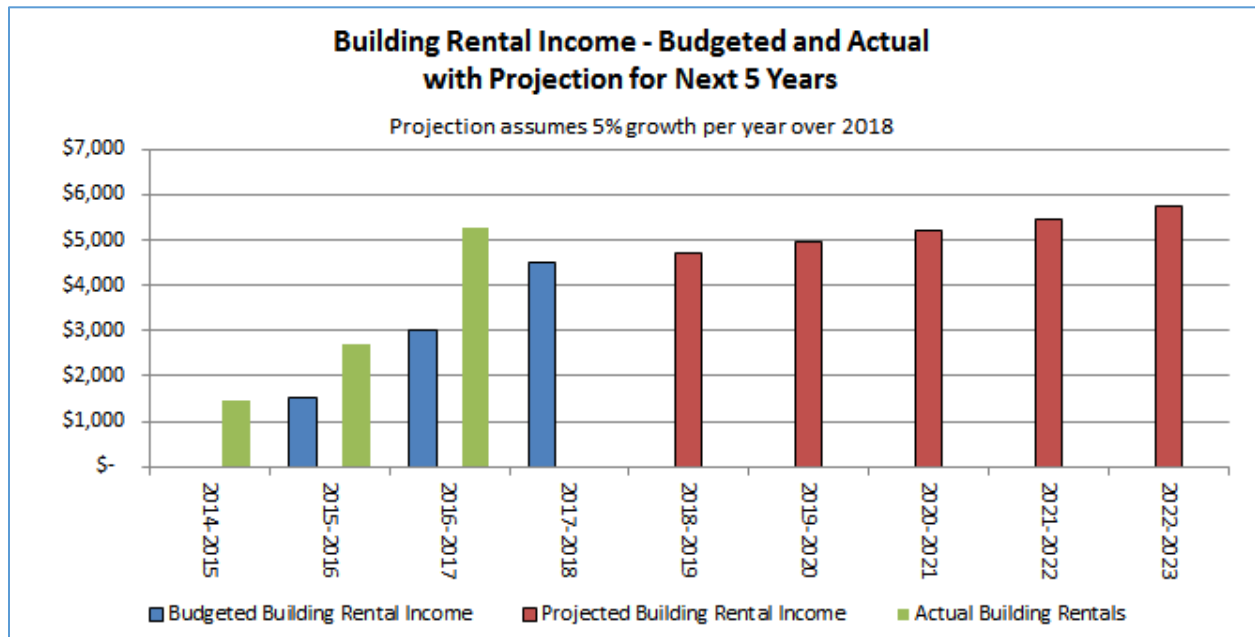
The next chart (Figure 29) shows yard sale income from 2009 thru 2017. Yard sales are not held every year. The average income from these yard sales is \$2909. The years 2014-2015 and 2015-2016 were sales where congregants were moving and we had a lot of household items to sell, resulting in above average income for those 2 years.



**Building Rentals**

Rental use of our building has been growing. By renting our space, we gain added income, and bring in guests who may not be familiar with our congregation. This can be a source of new members, and should be encouraged, to the extent that rental activities do not interfere with the regular church program. A significant amount of time is required from the Church Administrator (Mallory) to manage these rentals. At least an hour per week, for example, is required by Mallory just to support the use of the Audio/Visual system by the renters. Also, rental setup and takedown activities require significant time and effort by Sterling, the Facilities Manager.

The chart below (figure 31) shows budgeted and actual rental income for the last 3 years, since we have been in the new building. The projected income assumes that rental income can be increased 5% each year over the 2017-2018 budgeted number.



**Special Events – Music, Guest Speakers, Other Events**

We have several people in the church who know how to manage music concerts and other performance events, and it is recommended that a Special Event Team should be formed to manage these types of events. These special events should be managed by a volunteer team, rather than relying solely on the church staff. The Administrator will have to be involved as part of the building rental process, but volunteers should do as much of the management of the event as possible, especially the financial and advertising arrangements. Expertise is required to work with performers, and the Special Event Team should have the experience necessary.

**Capital Improvement Projects**

The funding of capital improvement projects is not budgeted by the Finance Team. The Board has established a Capital Fund that is available to receive donations for capital improvement projects. The projects must be approved by the Board based on available funds and priorities. The Property Team maintains a list of potential capital projects with a priority rating of 1 to 4. Establishment of an endowment fund should be explored for the future of the church with a goal of \$500,000.

### Expense Management

Salaries for the Minister and staff were increased in 2017, primarily by adding hours to the budget so that the Minister and staff can manage the increased activities of our programs and our new building. The financial projections above assume a 2.5% increase annual in salary expenses. There is some sentiment on the Board that hours and rates should not be further increased for the next few years, but inflation should be taken into account to some degree.

Careful management of operating expenses should be practiced by the church leadership and staff. Leadership training should be held for the staff to insure that they know their tasks and are working in an efficient manner. They should be focused on performing their necessary duties, and not be sidetracked into activities that are not necessary to their jobs. The structure of the staff versus volunteer duties should be examined by the Board and the Staff Congregation Relations Team. In particular, the use of volunteers to support staff functions should be encouraged to make staff time as productive as possible.

### Church Staff and Administration

#### Minister and Staff

We are transitioning from a Family type of congregation to a Pastoral type. This will require relying on Rev. Wendy and the staff to be at the center of multiple small networks of congregants. These networks are based on mutual friendships and common interests among subsets of the congregation. We are too big now for everyone to know everyone in the congregation. Rev. Wendy is happy to be a part-time minister so she can also be a mother to her children.

The staff is carrying a large load to keep up with the increased activities going on as our church gets busier. We need to make sure they have the support they need to be efficient and focused on their assigned tasks and not be pulled into tasks that volunteers should be handling.

Minister & Staff Recommendations:

1. We will have to trust the Minister and Staff to act in our best interests, while holding them accountable for their actions.
2. The Staff Congregation Relations Team (SCR) needs to become a highly functioning team to oversee staff operations and performance.
3. The Treasurer and the Administrator must work smoothly together to handle the financial operations of the church. The finances are more complex now, and require new systems of management between the Treasurer and the Administrator.
4. Explore ways in which volunteers can assist the staff in their functions. In particular, the church office (office angels?) and the building rentals could possibly use volunteer help. The turnaround after large church events often creates a heavy workload for the Facilities Manager. We should explore ways to assist in these turnarounds by use of volunteer help.

#### Church Member Database

The Team believes that to maximize the recruiting of members as volunteers, and to ease the administrative load in the office, a comprehensive member database should be developed for the church.

Database Recommendations:

1. Develop a robust database where many types of information are stored and retrieved by various groups and individuals who have responsibility for the administration of church business, operations, and programs. This database should have the following:
  - a. All church information including:
    - i. Names, addresses, telephone numbers, skills, and interests of members and friends
    - ii. Board and Teams information including mission statement and meeting minutes
    - iii. Rental information
    - iv. Current and historic computer files and documents archived
  - b. Rights assigned to each person with access to the database.
    - i. Administrator (s)
    - ii. Minister
    - iii. Board and Team members
    - iv. Members and Friends
  - c. Ability to create reports including a church directory
  - d. Ability to handle queries.
  
2. An investigation needs to be done whether there exists database software to do this either within UUA or commercially, or whether we need to create our own system.

## Church Operations Teams

### Church Organization & Structure

The Team discussed whether the organizational structure of the church was appropriate for our mission. While there are some areas where the organizational structure has been weak, such as the TLC, the Team feels that these problems are being slowly addressed and resolved. The Team believes that a good organization chart, combined with training for the Teams, TLC, the Board of Trustees, and for the congregation in general, will help to insure that everyone has a clearer picture of how the various parts of the church function, how those parts interact, and the roles of the individual volunteers.

The Team decided that to undertake another reorganization of the church structure, similar to that which happened before we moved to the Ouray building, would be very time consuming, distracting, and not the best use of the attention and time of the church leadership. The last reorganization took the better part of 2 years to accomplish, and we are still making adjustments to that plan. Should the Board decide to go through a reorganization again, the Team recommends that a consultant who is versed in church structure and organization should be retained to help guide and streamline the process.

### Board of Trustees (Board)

The Board consists of the President, Past President, Vice President, Treasurer, Stewardship Trustee, and two Members-at-Large. These positions serve for 1 year, and are term limited to two consecutive terms. At least one year must elapse before a Board member can be re-elected to the same position on the board. The church Administrator functions as the Board Secretary, although in the past there was an elected Secretary to the Board. The Board also had a youth member in past years.

### Board of Trustees Recommendations:

1. Publish a summary of the minutes of the Board meetings in the newsletter and on the website the week following the meeting.

2. Revisit the decision not to have a Board Secretary. The Board Secretary, rather than the Administrator, would distribute the agenda and record and distribute the meeting notes following the meeting. This would eliminate the labor cost of having the Administrator function as Board Secretary.
3. Consider having a youth member as a Board member again. This would create a strong tie to the RE program, as well as developing future leaders.
4. When positions on the Board become vacant during a term, the Board must fill those positions in a timely fashion, especially when they occur in an important position such as Stewardship.
5. Add a provision to the ByLaws which establishes a method to replace a TLC member who resigns from the TLC during the church year.
6. Establish a ByLaws provision for the LDT to serve as the liaison between the TLC and the Board.
7. Formalize the mission, scope, and responsibilities of the SCR in the ByLaws.

#### Staff Congregation Relations Team (SCR)

The SCR has been created to provide oversight of the church staff, which insulates the Minister from having to perform the conflicting roles of ministering to a staff member, while simultaneously supervising that staff member. The SCR is responsible for determining church staffing, creating staff job descriptions, and conducting staff performance evaluations.

#### SCR Recommendations:

1. Formalize the mission, scope and responsibilities of the SRC in UUCGV By-laws and Policies.
2. Revise and complete the Personnel Policy Manual, and review the job descriptions for staff.
3. Set up a performance evaluation procedure for the staff.
4. Handle job performance issues arising with individual staff members, between staff members, between staff members and the Minister, and between staff and the congregation. It is difficult for the Minister to be the minister for a staff member and also be that person's job supervisor who judges the performance of the staff member.

#### The Team Leadership Circle (TLC)

The TLC is charged with administering and managing the Programs of the church and its Calendar. Programs are defined as those Calendar-based activities which put forward the ideals of the Mission, Vision, and Principles which are the guide posts of UUCGV. The TLC is made up of 6 members, of which 4 are to be the team leaders of the Worship, Membership, RE, and Celebrations Teams.

#### TLC Recommendations:

1. Follow a prepared agenda to insure that an orderly discussion is held in a timely fashion.

2. Establish some method for having continuity in the meetings by creating the position of meeting chairperson or facilitator. The job should be given to a member of the TLC on an annual (or other) basis who can conduct an efficient meeting.
3. Develop a clearly written definition of each TLC member's duties and responsibilities.
4. Define in writing the duties of each team, and the interactions between the teams.
5. Develop a clear procedure for responding to requests from outside groups seeking UUCGV sponsorship.
6. Publish a summary of the minutes of the TLC meetings in the newsletter and on the website.

### Committee on Ministry (COM)

The Committee on Ministry has these assigned duties in the Bylaws:

1. Facilitate the Beloved Community process to promote our Covenant of Right Relations.
2. Nurture the needs of the minister and maintain a channel of communication between the minister and the congregation
3. Recommend a salary and benefit package for the minister to the Finance Team
4. Create a safe place for members to resolve conflicts

There are no recommendations for the COM.

### Leadership Development Team (LDT) and Volunteer Activities

How do we recruit new members into volunteer positions that match their talents and provide enjoyment to them? The Leadership Development Team is charged in the ByLaws with finding and recommending candidates for elected positions on the Board and the TLC, as well as "soliciting qualified candidates for all team leaders". They are also charged with assisting in recruiting non-elected team members and volunteers for the various teams, and making recommendations to the Board for training.

The Team discussed at length how to strengthen the recruiting and training of volunteers to serve in the many volunteer positions around the church. The Team was frustrated that recently the LDT has not functioned well in recruiting volunteers, much less in training them. Also, there is a lack of job descriptions for volunteers, which deters new volunteers from committing to a position about which they know very little. The LDT should be responsible for creating and maintaining volunteer job descriptions.

The current LDT is comprised of Dave Miller, Bill Hilty, and Duane Carr. The team is in transition with Dave Miller planning to move, and Duane being new. Duane has been visiting lots of team meetings recently to see what their needs are. The Board should consider replacing LDT members who are not going to be able to serve out their term, and should consider expanding the LDT by one or more members to insure that all the duties of this important team are fulfilled.

Recommendations:

1. The LDT should resume their role in assisting the teams in identifying and recruiting non-elected volunteers for positions on teams.

2. The LDT will define in writing the jobs for all volunteers, including their relationship with the duties of other teams. The LDT should create job descriptions for all volunteer positions, both elected and non-elected. These will be provided to all volunteers when they are recruited and trained.
3. The LDT should arrange for formal leadership development for all levels of the church – the Board, Staff, Teams and Team leaders, volunteers, and the congregation in general. The LDT needs to find a replacement for the loss of the Russell Lockwood training where we previously sent our leaders for training.
4. A representative from the LDT should be required in the ByLaws to attend all TLC and Board meetings, not as the facilitator for the TLC meeting, but to take notes on TLC activities and decisions and serve as the liaison between TLC and the Board.
5. The LDT should be responsible for creating and maintaining a church-wide organization chart.
6. The LDT membership should be revitalized and possibly expanded by one or more members to insure their duties can be fulfilled.

#### Safety and Security

The church should have a proactive plan implemented for safety and security. The concept of safety includes how to respond to an attacker, how to respond to someone creating a disturbance during the service, how to respond to a fire, how to respond to a heart attack, and other such emergencies. At present it is not clear whether the church has planning or training for handling these situations.

#### Recommendations:

1. The existing Safety Team should become active again and new members added if necessary.
2. The Property Team should construct a door at the bottom of the back stairs to enable a lockdown of the basement should this be necessary during an attack. The Property Team has discussed a design for such a door, but funding was never approved to do this construction. The door would have a break bar to allow persons to exit the building from the basement up the stairs, but could be locked to prevent entry from the stairwell side into the basement. The lock should be easily and quickly applied during an emergency, and not require an Allen wrench like the upstairs doors use to be locked and unlocked. Finding and using an Allen wrench would be too cumbersome in the few seconds available to respond to an emergency.
3. The Board should create a team of trained Safety Ushers, at least one of whom would be scheduled to be present at every Sunday service, as well as major congregational social events (auction, Thanksgiving, etc.). This team would unobtrusively monitor the foyer and the people entering for the service, and would be vigilant during and after the service for unusual activities and disturbances. Should a disturbance occur, this team would have a predetermined plan of action for how to respond. At one time there was an understanding that spontaneously singing the hymn “Spirit of Life” would be a signal for action. The question of whether guns should be part of the Safety Team response capabilities needs to be discussed. The proposal to create a Safety Usher Team has not been acted on.

4. The Property Team should develop a proposal for a minimum security camera system which would allow for real time monitoring as well as continuous recording capabilities. Real time monitoring would require a laptop or desktop computer to display the data from the camera system. This system would be funded through capital project donations.
5. The Board and the Safety Team should solicit capital project donations for purchasing a defibrillator for the church.
6. The Safety Team should develop a fire response plan for the church, and a fire drill conducted at least once a year at a Sunday service for the entire building.
7. The Property Team should proceed with phase 1 of the parking lot lighting upgrade project when capital funds become available.

### Advertising & Marketing

Advertising and marketing of the church is important for both building the membership of the church, and as part of our community outreach to the Grand Valley.

#### Recommendations:

1. At one time we had a team that was responsible for advertising, publicity, and marketing of the church. There been no such team in recent years. We need to revitalize this function to make sure the church is known to the outside community. Methods of advertising and publicity in the past have focused on the newspaper, but this may not be the most cost effective way to get our message out.
2. The use of social media and our web site are now being used by the Administrator to advertise the church to the wider community. A Media Outreach Team, which would include the Administrator, should be created to investigate new and better ways to advertise who we are and what programs we offer and manage our media outreach.

### Property Team

The Property Team is responsible for maintenance of the building and grounds, as well as planning and overseeing capital projects such as major upgrades and remodeling of the building. The Property Team also coordinates building and grounds maintenance with the Groundskeeper (Jay Martinez) and the Facilities Manager (Sterling VanWagoner).

In the recent past the Property Team has completed the building remodeling, repaired the parking lot paving, replaced the basement carpeting, upgraded the sound and video system, and is currently working on upgrading the lighting for the parking lot, designing a playground, and replacing the front entrance canopy.

#### Recommendations:

1. The Property Team is working on plans for a playground in the rear of the church, as well as replacement of the front entry canopy. Input from the congregation will be needed and welcome to insure that these projects meet the needs of the church.
2. Financial support of capital improvement projects will be essential to achieving these ambitious plans for the church building and property. Capital funds for current projects either do not exist,



or are quite limited, so additional fundraising will be necessary to carry out the playground and entry canopy projects.

### Building Rentals

Building rentals are both an important outreach activity to the outside community, and a revenue source for the church . The Administrator says that we are probably at the maximum level of building rentals this year, considering the administrative time it takes, and the capacity of our schedule. One way to ease the administrative and facilities management burden would be to establish a volunteer Building Rental Team to assist in this important process.

#### Building Rental Recommendations:

1. Establish a Building Rental Team or volunteer positions to assist the Administrator and Facilities Manager in planning and executing the arrangements needed for building rentals.
2. Review our rental rates to make sure we are actually making a profit after the labor of setup and teardown is included.
3. Develop a detailed Rental Setup Form for use by the Facility Manager. This form would list exactly what setup is required for each event, including a sketch of the meeting room layout, as well as the detailed audio & video requirements for the meeting.

### MDD, PWR, and UUA

Our church is part of a pyramid of higher UU organizations: We are in the Mountain Desert District (MDD), which is part of the Pacific Western Region (PWR), which is part of the Unitarian Universalist Association (UUA). Our involvement with the PWR is relative new. In the past we worked only with MDD, and the District Director visited us at least once a year. In recent years we seem to have no personal relationship with the MDD and little with the PWR. Now that everything is centered in California rather than Denver, training and conferences are further away and hence more expensive for church leaders and members to attend. We need to find a way to bring the resources of the UUA, PWR, and MDD back to Grand Junction. Is there someone in the PWR who can provide the resources we enjoyed in the MDD? The churches in the MDD tend to be smaller and could use support from PWR.

We also used to participate in training through the MDD, but the PWR has ended the Russell – Lockwood Leadership Conference, which was once our best place to train our leaders.

#### Recommendations:

1. Contact PWR to find out what resources are available to us and how to request them.
2. Request information from MDD, PWR, and UUA on resources for leadership training for volunteers which could be held at our church.
3. Replace the Russell-Lockwood Training with another resource for our church leadership.

## Program Areas

### Sunday Services, Attendance, and Worship Team

Sunday services are the backbone of the church, and are the one of the most important factors in whether a visitor will stay and become involved as a member (the other is Religious Education). The quality of the Sunday services has in general been good over the past several years in the opinion of the Team.

With additional members taken into account, the projected Sunday Service attendance over the next 5 years will average around 105 adults (see attendance projections in figure 28). While this is below the maximum capacity of the sanctuary and chancel combined, it is impossible to predict how the count will be divided between the sanctuary and chancel. The fire code limits are: 93 people on the main floor of the sanctuary, 32 people on the chancel, 13 seated people in the upstairs kitchen, and 110 people in the main basement area.

Based on historic ratios of RE attendance to Adult attendance, Children's and Youth RE average attendance is projected to be around 21 each Sunday by 2021 (figure 28), assuming that we achieve the increase in members discussed above to balance our budget.

#### Recommendations:

1. The Worship Team should start counting attendance separately in three areas of the sanctuary for fire code compliance: The main floor of the sanctuary, the chancel, and the kitchen.
2. The Property Team requests that the Worship Team provide worship associates who are trained to operate the sound and video system, and have associates scheduled for this duty every Sunday. This would remove a worry from the Minister and others who are using the system for services. The Property Team would provide training and backup support for these associates.
3. The Worship Team should start planning now for how to provide two worship services starting in the next two to three years if needed.

### Seven Possible Options for Two Services

Once the membership grows to the point where Sunday morning worship service exceeds the facility's limits, the worship team will need to provide for an additional service. Seven different scenarios are given below for ways in which two worship services could be provided. If the financial recommendations are achieved for growing the church membership, the need for two services should occur sometime within the next 2 to 3 years (see figure ???).

#### *Option 1: Hold Two Identical Sunday Morning Services*

1st service - 9:00 - 10:00 a.m.

Social hour - 10:00 - 11:00 a.m.

2nd service - 11:00 - 12:00 p.m.

Both services would basically be the same. Where they may differ is whether or not the choir\special music is present at both services.

#### Benefits:

1. With the social hour in between the two services, people from both services can socialize.

2. If RE happens during the first service, the RE teachers could attend the later Sunday service. This might make it easier to get more people to volunteer to teach RE.
3. If we develop an Adult RE program, it could be held at the same time as the children's RE program.
4. Bring back Story Time during the later service. This could happen when the new year begins in September when more families are likely to attend.
5. Story Time would bring the children back into the service and also allow the parents time to enjoy and reflect on the sermon.
6. Story Time is a good way to recruit new families.

*Option 2: Hold Two Different Sunday Morning Services*

Have two services as in the first suggestion but they would be different. One would be traditional and the second could be lay led or contemporary.

The possibilities for RE remain the same.

Benefits:

1. People could choose which type of service (or time) they prefer.
2. Wendy would not necessarily have to give two sermons.

Drawbacks:

1. Two different services may require much more preparation, both for those giving the service and Wendy.

*Option 3: Hold Two Services On Different Days*

Have the two services on two different days. The Sunday service would remain as it is now (possibly with Story Time). Have the second service on Wednesday night (or night of congregation's preference).

The Wednesday service could be the same as the Sunday service (with the possible exception of music). If we wanted the service to include hymns, we would need someone to play the piano. Child care may be needed.

OR

The Wednesday service would include the readings and the sermon. After the sermon the congregation is invited to stay for a discussion of the issues raised in the sermon. Child care may be needed.

OR

The Wednesday service could be a contemporary service lead by Wendy or lay people. It could include families and include a potluck.

Benefits:

1. A second option for folks who are unable to attend on Sunday.
2. An opportunity to further study the issues in the sermon.

*Option 4: Hold RE at 9:00 AM Sunday Morning*

Hold RE at 9:00 on Sunday morning, freeing up the basement at 11:00 for overflow viewing of the service.

Benefit:

1. We would just be using the basement more efficiently on Sunday mornings. Also, RE teachers could attend church too.

Drawback:

1. We have tried RE at 9 before (Grand Ave) and some parents and teachers didn't like that schedule. The problem of what to do with the children during the 11:00 hour would have to be worked out. Some parents don't want to be distracted by the children in the entire service.

*The next 3 options are thinking way outside the box:*

*Option 5: Add a Portable Building for RE*

Rent part of the field behind the church from the library. Rent a mobile unit like those used by the schools. Purchase a large screened TV for the downstairs area. The congregation could use both the upstairs and the downstairs. The RE program would be held in the mobile unit.

Benefits:

1. We would more than double our occupancy.
2. The whole congregation would be together.
3. Social hour could be downstairs where there is a bigger kitchen.
4. We would not have food in the sanctuary.
5. The playground could be in the same area as the mobile unit.
6. The mobile unit could be rented out during the week which would help cover the costs.

Drawbacks:

1. Costs.
2. There may be liability issues with crossing the alley.
3. The property behind the church is probably not available.

*Option 6: : Rent or Purchase an Adjacent Building for RE*

See if there are any properties close to us that we might be able to rent/purchase in the future. (Senior Center?). There is continuing interest in a GJ Recreation Center. If so, that may be where the Senior Center might move. We should probably check to see if that is the plan.

Benefits:

1. Plenty of room for RE and possibly other things

Drawbacks:

1. We can't afford to do this.
2. Adjacent buildings probably are not going to be available, especially at affordable prices.

*Option 7: Move the Church to A Larger Building*

A church may become available for purchase. Though we would not be interested in the "icons" and such, the building would probably be laid out generally the way we would want it as a church.

Benefits:

1. Plenty of room for RE and possibly other things

Drawbacks:

1. We can't afford to do this.
2. We love it where we are.
3. There aren't many empty church buildings in the central part of town where we want to be.

### Children's and Youth RE

The new program for Children's and Youth RE, based on short term projects (1 month) appears to hold promise for revitalizing the Sunday RE program. The RE program is vital to the future stability and success of the UUCGV. Children's and Youth RE attracts young parents who want a liberal approach to religious education for their children. These young families are an important part of the church. The Children's and Youth program must operate at a high level to attract and retain young families in the church.

Recommendations:

1. The entire RE program – Children, Youth, and Adult – is of vital importance to the future of this congregation. There need to be performance measurements put in place by the Board that will determine if we are making progress toward our goal of a highly successful RE program.
2. Is our current project based approach supported by the UUA? Are we taking advantage of UUA curricula and support?
3. The Youth RE program is not relying on the same set of volunteers every Sunday this year as was the practice for the previous 2 years. The RE team and the RE Coordinator need to insure that the Youth program does not fall behind because of inadequate planning and support for the project activities for that age group. The Youth project activities are intended to be tightly integrated into the projects that the Children are working on.
4. Shari Daly-Miller has indicated to the Team that she does not plan to remain as the UUCGV RE Coordinator for longer than 2 to 3 more years. Planning needs to begin as to how we will want to replace Shari when she plans to leave Grand Junction. The next RE staff person should be a UUA certified DRE with a track record of performance.

### Adult RE

The cornerstone of the Adult RE program is the Build Your Own Theology series taught by Rev. Wendy.

Recommendations:

1. Provide more Adult RE programs. The Book Discussion Group could be started again, along with other types of groups to meet the interest of Adult members. Of course, this is highly dependent on volunteers who want to be in charge of these series.
2. Does the current RE Team do any work on Adult RE? If not, create an Adult RE team and/or volunteer position to work with Rev. Wendy to expand the Adult program.

### Membership Team

The revitalized Membership Team is off to a very good start. A highly functioning Membership Team is vital to the future success of the church. As the program of the church improves, we should be getting new visitors to those programs. The membership team has to capitalize on having those new visitors who are interested in our programs and our values.

Recommendations:

1. Identify visitors, discuss their needs and desires with them, and explain how the church can meet their needs. The ultimate success with a new visitor is to gain a new pledging member who is volunteering in an area that they are excited to be part of.
2. Continue the Wednesday evening get-togethers. These evenings are one way for visitors to get to know members of the congregation in a relaxed atmosphere.

### Stewardship Team

A smoothly functioning Stewardship Team is also vital to the stability and future of the church.

Recommendations:

1. Develop continuity of leadership in the Stewardship Team. This is essential from year to year to insure that pledge income is optimized. Provide formal training for Stewardship Team members so there is always a group of people who know how the pledge drives work, and how the Stewardship Team functions.
2. Develop expertise in persuading members to make optimal pledge amounts, based on their financial resources. This includes communicating to existing members the necessity of increases in their pledges whenever possible. This is a fine line to walk, but will be important in meeting our financial goals in future years.

### Special Events

The congregation has long enjoyed music series like Spirituality Through Music. There were comments to the Team that these are being missed this year. Also, Rev. Wendy has suggested that we could create a new income source by creating high quality special events for the congregation and the outside community.

Recommendations:

1. Form a Special Events Team that would know how to create music series, music specials, and other events such as guest speakers. The Celebrations Team is responsible for the traditional events of the church like Thanksgiving Dinner, Easter Potluck, etc. A Special Events Team would have members who are experienced in planning music and other events, including financial arrangements with artists and performers, and advertising and publicity of these events to the outside community. We have at least 5 members and friends who already have these skills (see Details section).

### Social Events

The Wednesday evening social events are intended to attract both established members and new visitors. This mixing is felt by the Membership Team to be essential to getting new people interested in the activities and programs of the church.

Recommendations:

1. Continue and enhance the Wednesday evening social events as a vehicle to build ties between current members, new members, and visitors.

### Community Outreach

As a liberal oasis in a conservative community, we need to advertise our existence to like-minded people. The building rental activities bring outsiders into our facilities for events that appeal to people who are potential UUCGV members. A prime example is the New Dimensions Classes.

Recommendations:

1. Advertise. Create an Advertising and Marketing Team or Volunteer position. We need help identifying our audience and how to go about this.
2. Participate in interfaith groups.
3. Make our facilities available for other organizations who share our values.
4. Create a Building Rental Team or Volunteer positions to assist the staff in delivering quality experiences to the organizations who rent our facilities. This would save staff time and cost, and could allow us to continue and possibly expand our income from building rentals.

### Social Action

Several people mentioned to the Team that Social Action programs at UUCGV have lagged in recent years. The reason given for this is the feeling that some past social action programs have not been well received by part of the congregation for various reasons.

Recommendation:

1. Social action can originate at multiple levels of the church – the Board, the various teams, and individual congregants.
2. Social action programs should have prior approval by the TLC and the Board, and have congregational buy-in before they are undertaken.

## Details of Team Findings

These findings are the result of 6 months of meetings, interviews, and discussions. They are organized by the functional areas of the church. The questions that the Board originally posed to the team are embedded in the discussions of each functional area.

As the team discussed and researched the Board's questions, it was impossible not to expand our inquires to broader topics. To be able to predict the future, we needed to have a feel for the current trajectory of the various activities being undertaken by the congregation as seen in the church's volunteer teams and staff. We tried to gain an overall understanding of the current state of the church in terms of organization, leadership, finances, functioning of the various teams, staff duties, and the mission of the church both for serving the congregation's needs, and as outreach to the Grand Valley.

By understanding the strengths and limitations of all these areas of church life, we could then attempt to project how growth (or lack of it) might play out over the next 5 years, and make recommendations regarding these growth scenarios. Of course, it was not possible to completely understand all the dynamics at play in the church, but we have tried in this report to distill our discussions, interviews, and findings into broad categories of church life and function.

As the Team considered the questions from the Board on the impact of growth of the church, we realized that it was necessary to discuss parts of the church operation that were seen as impeding the optimal functioning of the congregation, and thus needing improvement. Those areas that have weaknesses will be discussed in the answers given below, with recommendations for strengthening those areas.

## Church Size & Growth

The Board asked the team to predict the consequences of church growth over the next 5 years. The Board asked us to use statistics of Sunday service attendance, membership levels, and financial support from the previous 3 church years (2014-15 to 2016-17) as a basis for our 5 year projections. In some cases we were able to use historic data going back to 2002 or earlier for making projections.

### Building a Quality Church Program

The Financial Projections (below) indicate a shortfall in income in the next 5 years. To close this income gap, various strategies for achieving growth will be recommended, including gaining more members for the church. It is important to note, however, that growth in the membership cannot be made just for the sake of more financial income. It is imperative that the growth be achieved through organic means; in other words, the growth must come naturally through the delivery of a quality set of church programs and activities. This will attract new members who share our beliefs, are excited to be part of the church, who will volunteer to help build and operate the church programs, and who will be willing to help fund the church at a sustainable level.

Without quality growth, any short term increase in membership will not last over the long term, and the program and mission of the church will ultimately suffer. The aim of this report is to assist the leadership and congregation in building these quality church programs and activities that will insure our future as a church.

### Church Size Levels

According to the UUA website <https://www.uua.org/documents/congservices/sizetransitions.pdf>, based on worship attendance numbers, there are four types of sizes of congregations:

- Family size (0 to 50)
- Pastoral size (50 to 100)
- Program size (150 to 300)
- Corporate size (350 to 500+)

### *Family Size Congregations*

A family size congregation is a small congregation that operates like an extended family (and may in fact be a biological family network). Everybody in the church knows everybody. This church organizes around one or two anchoring figures called matriarchs or patriarchs. Such congregations often have part-time ministers who tend to adopt the chaplain role – leading worship and giving pastoral care. A minister who challenges the authority of a matriarch or patriarch, or who presumes to be the primary leader of the congregation, generally will not stay long.

### *Pastoral Size Congregations*

A Pastoral size congregation is a coalition of two or three family and friendship networks unified around the person and role of the minister. The minister maintains a direct ministerial relationship with each member by coordinating the work of a small leadership circle, personally conducting worship, and leading small group programs such as adult religious study. The governing Board usually operates like a



committee, arranging much of the day-to-day life of the congregation. Members recognize each other's faces, know most people's names, and notice if someone new is present at worship.

### *Program Size Congregations*

The Program size congregation is known for the quality and variety of its programs. Separate programs for children, youth, couples, seniors, and other age and interest groups provide entry points to congregational life for a wide range of people. The minister's crucial role is to recruit, equip, and inspire a small circle of key program leaders – lay and ordained, paid and unpaid. This ring of leadership might include the choir director, the director of religious education, the adult education director, and the new member committee chair. Working as a team with the minister, these leaders reach out to involve others as program participants and as leaders. The leadership circle shares broadly in decision making (among perhaps fifty people), and the laity share pastoral care.

### *Corporate Size Congregations*

Excellence in worship and music, as well as a range and diversity of programs characterizes the corporate size congregation. Specialized ministries focus on narrowly identified groups of people; several of these programs have a reputation beyond the congregation for their excellence. Often, distinct sub-congregations form around multiple worship services. The senior minister spends more time preparing to preach and lead worship than do most ministers and must be skilled at working with a diverse staff of full-time professional leaders. A multilayered structure of staff, Boards, and committees make decisions. While ministers continue to provide pastoral care, especially in crisis moments, most members find their spiritual support in small groups or from lay visitors.

### *Congregational Size Transitions*

Smaller-sized congregations, the family and pastoral sizes, are single-celled organisms. They function as one whole and resist further division. In the family size, "everyone knows everyone". In the pastoral size, the minister knows everyone. Their respective sizes seem to be the practical limits at which members and ministers can handle "knowing" well. Any additional growth makes these techniques of interacting and caring ineffective. The techniques themselves undermine future growth to program size or larger. The continued use of those former practices then leads to an attendance plateau.

The second dynamic recognizes that there is a resistance to any changes in what holds the center of congregation life. In a family congregation, the whole group occupies the center. In a pastoral congregation, the minister is at the center. The size transition of family to pastoral size requires that the center of the congregation change from being the group to being the pastor. In moving from small to large sizes, congregations find it hard to retain the democratic feel, to discover the necessary talent, and to ask clergy to assume new roles. We need to take time to understand who we are culturally and then use what we learn to create a foundation for change. The congregation must relate what it values from its past to its planned future.

### *Our Congregation Size*

With a membership currently at 88 (October, 2017), we are clearly in the Pastoral size range as described above. We have been in this size range for a number of years, yet we have retained some of the habits and characteristics from our years as a smaller Family size congregation. The Team feels that a complete transition to a Pastoral congregation may have been delayed because of the weakness of our ministerial choices in the past, and because of our lack of a permanent home. Until Rev. Wendy became minister, we had not had a minister who could successfully function in the Pastoral model. This is both a function of the skill of the minister, and the level of trust that the congregation is willing to vest in the minister. Until

recently, one or another family group has filled the Matriarch or Patriarch role in the leadership of the church, which is characteristic of a Family size congregation. Rev. Wendy has said that we are now in the transition from Family size to Pastoral size. The Team sees that Rev. Wendy understands what this transition means, and that she is moving toward a fully Pastoral model or church functioning. The Team sees evidence of this transition state in its examination of the various functional areas of the church, as will be discussed below.

**Church Size & Growth Recommendations:**

1. The congregation should be taught about the size changes taking place in our congregation so that they understand new ways that the church is functioning.
2. Focus on the quality of our programs - especially worship services and RE. If we deliver quality programming, visitors will be more likely to join the congregation once they find us.
3. The Membership Team and Stewardship Team must function consistently at a high level to attract and retain new pledging members.
4. For additional ideas on attracting new members, see Appendix 4: *Nine Surprising Patterns in Growing Churches*

## Membership and Attendance Data

### Historic Membership

Figure 1 below shows the historic membership of the UUCGV, as reported to the UUA in annual numbers. The years 2002-03 to 2005-06 have been revised downward to estimated values, as the numbers reported to the UUA for those years were seriously inflated by the minister at the time (for example, 132 members were reported to UUA in 2005-06).

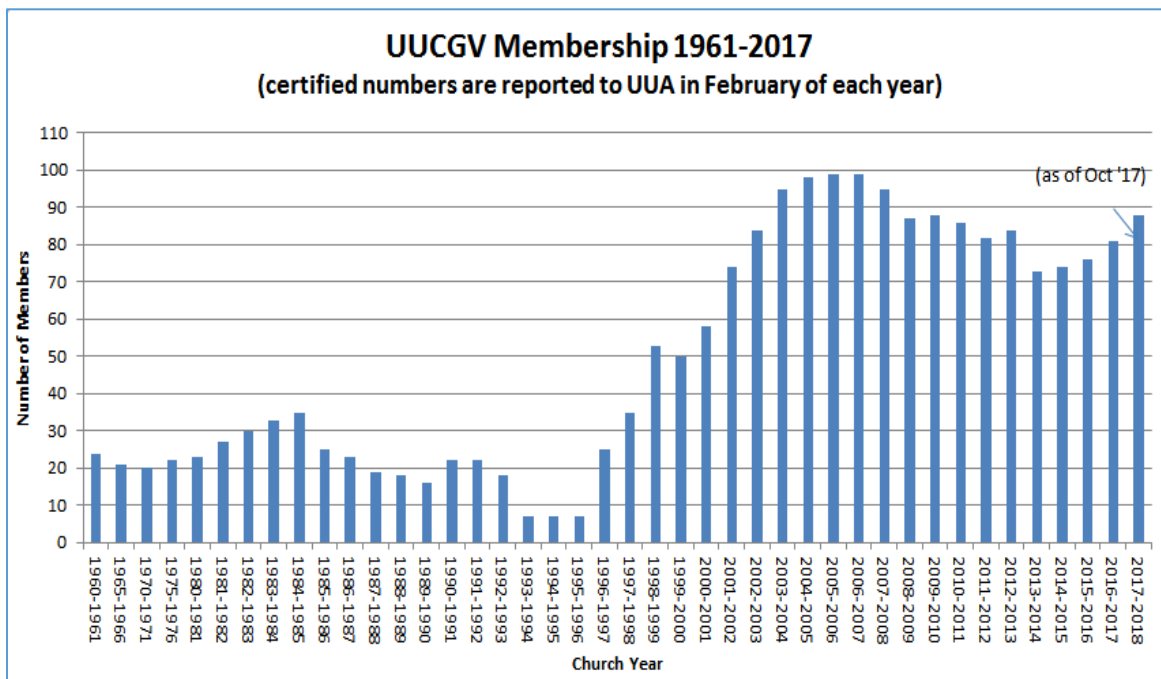


Figure 1 UUCGV Membership 1961-2017

**Proportion of Members that Attend Sunday Services**

The next chart (Figure 2) shows the proportion of members who attend Sunday Services on average. Of course, there are an unknown number of visitors included in the attendance number. The average ratio of attendance to members is 63% for the church years 2002 through 2018. The Average ratio for the last 4 years is 79% attendance to members.

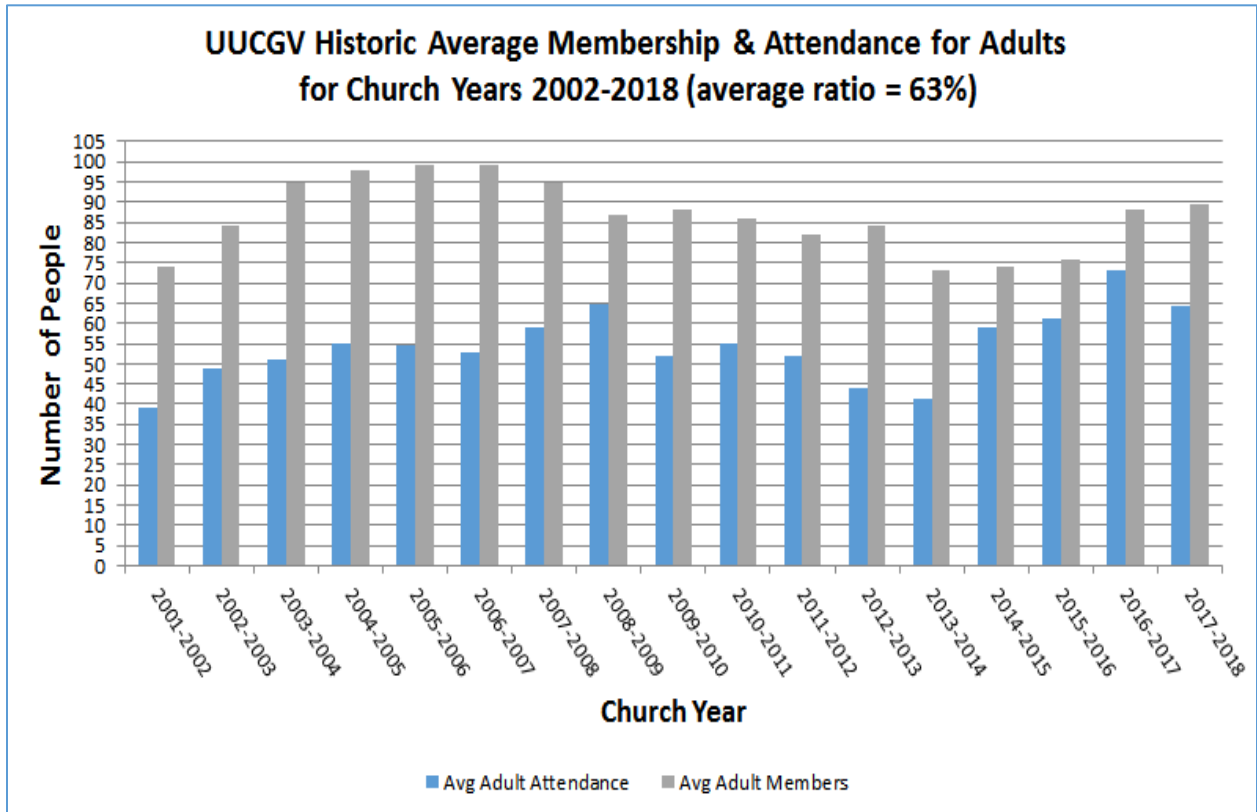


Figure 2 Average Adult Membership vs. Attendance 2002-2018

**Proportion of RE Enrollment that Attends Children’s RE**

The next chart (Figure 3) shows the number of children enrolled in RE, and the average attendance at Children’s RE. The enrollment numbers are values as reported to the UUA in January of each year, while the attendance numbers were recorded by UUCGV. RE attendance data is not available for the first two years of this range.

The average ratio of Children’s and Youth RE attendance to enrollment is 39% for the church years 2004 through 2018. For the years 2003-06, the enrollment numbers appear to be abnormally high, so it could be that the same inflation of membership that occurred in those years also was occurring in RE enrollment, but the Team has no proof that this occurred. However, the high RE enrollment does look suspicious,

since the attendance numbers were actually falling during several of those years.

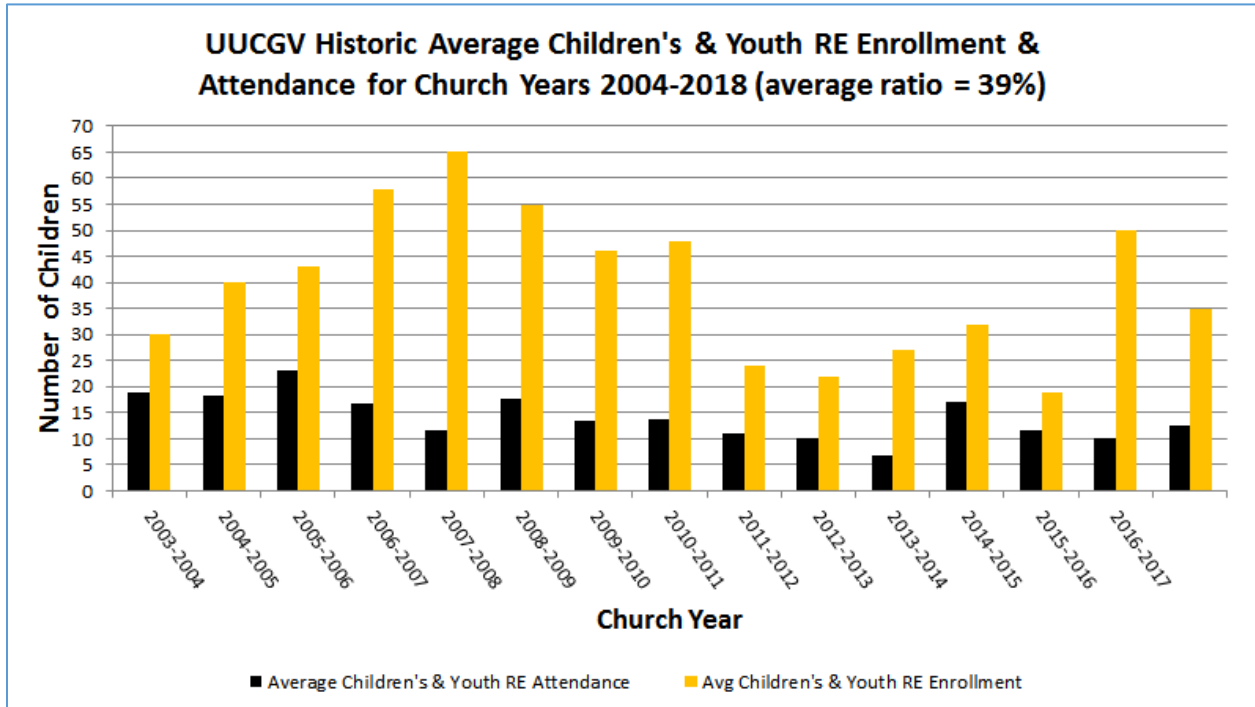


Figure 3 Children's & Youth RE Enrollment & Attendance 2002-18

**Historic Sunday Service and RE Attendance**

Figure 4 shows annual average attendance at Sunday Services and Religious Education from 2001-02 to 2017-18. During the church years 2003 to 2010, Sunday worship attendance was relatively stable, peaking in 2008 at about 65 for Sunday service. Average annual children's & Youth RE attendance peaked in 2005, at about 23 per Sunday, and then began declining after 2008. Then, in the years 2011 to 2014, when the church was based at the First Congregational Church, attendance declined, both for Sunday service and RE, possibly due to having Sunday services in the afternoon.

Once the new building on Ouray Ave. was occupied, we have had steadily increasing attendance on Sunday mornings. Children's & Youth RE showed an increase in 2014 when we first moved to the Ouray building, but fell off again in the following 2 years. An uptick in attendance has occurred in the summer and fall of 2017, which is encouraging.

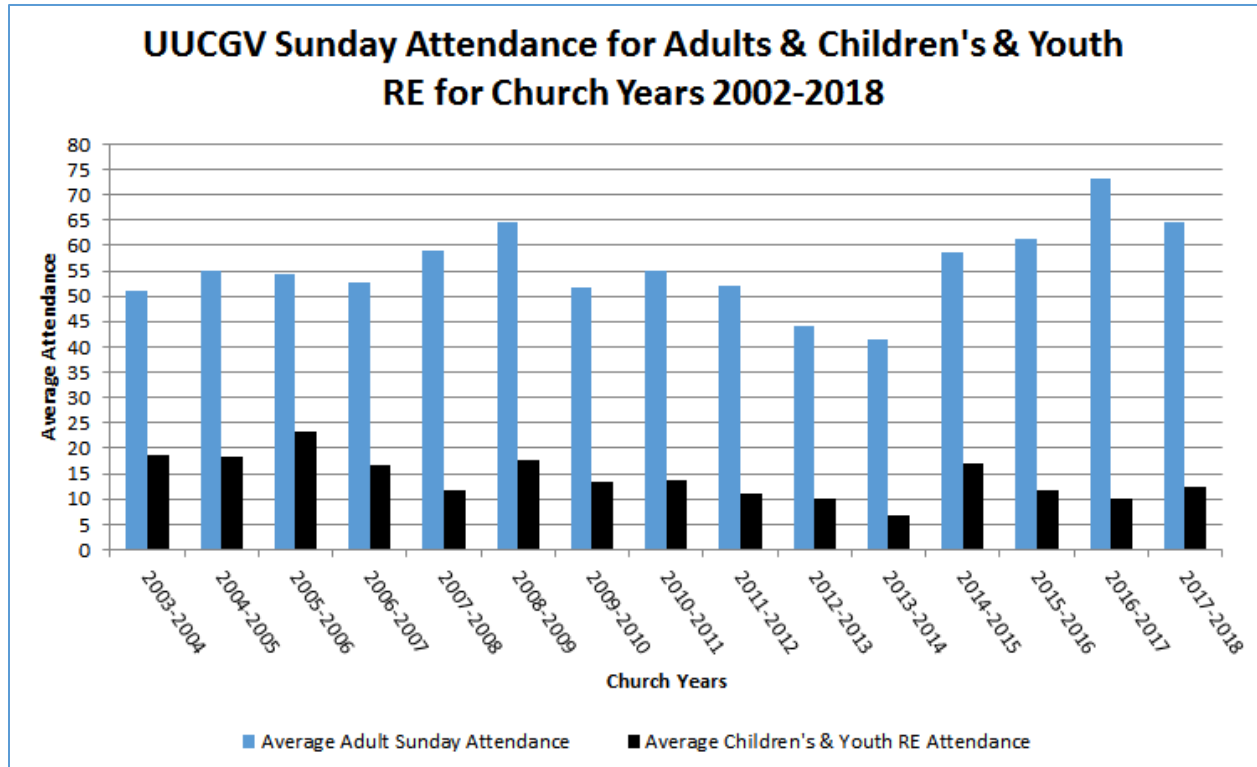


Figure 4 Historic Sunday Attendance 2002-2018

#### Maximum Occupancy Limits for Building

The Grand Junction Fire Marshall has set occupancy limits for the building, based on international fire code regulations. These are:

- Main sanctuary floor – 92 persons
- Chancel platform – 32 persons (choir, minister, worship associates)
- Combined main floor and chancel – 124 persons
- Upstairs kitchen – 13 persons (seated, with no tables)
- Downstairs main hall – 110 persons

Appendix 3 at the end of this report gives the calculations for these limits.

#### One Year weekly Attendance Data

The next two charts (Figures 5 & 6) show the weekly attendance data for adults and children for one year, from October, 2016 to October 2017. Note the seasonality that has fewer adults and children attending during the Christmas time period, and during the summer. The average weekly attendance for this 12 month period was 73 adults and 10 children.

We show a maximum of 110 adults on one Sunday in the first chart below, and on 4 occasions we show more than 92 persons. Thus we may have exceeded the main sanctuary floor limit of 92 on those 4 dates, but because our attendance numbers do not differentiate between people on the chancel platform (choir, minister, worship associates) and people on the main floor, we may not have exceeded the combined limit of the sanctuary and chancel of 124 persons. The projected average attendance for the next 5 years will be

shown later in Figure 29, after projected membership has been discussed. These numbers have implications for whether we will have to provide for an additional worship service.

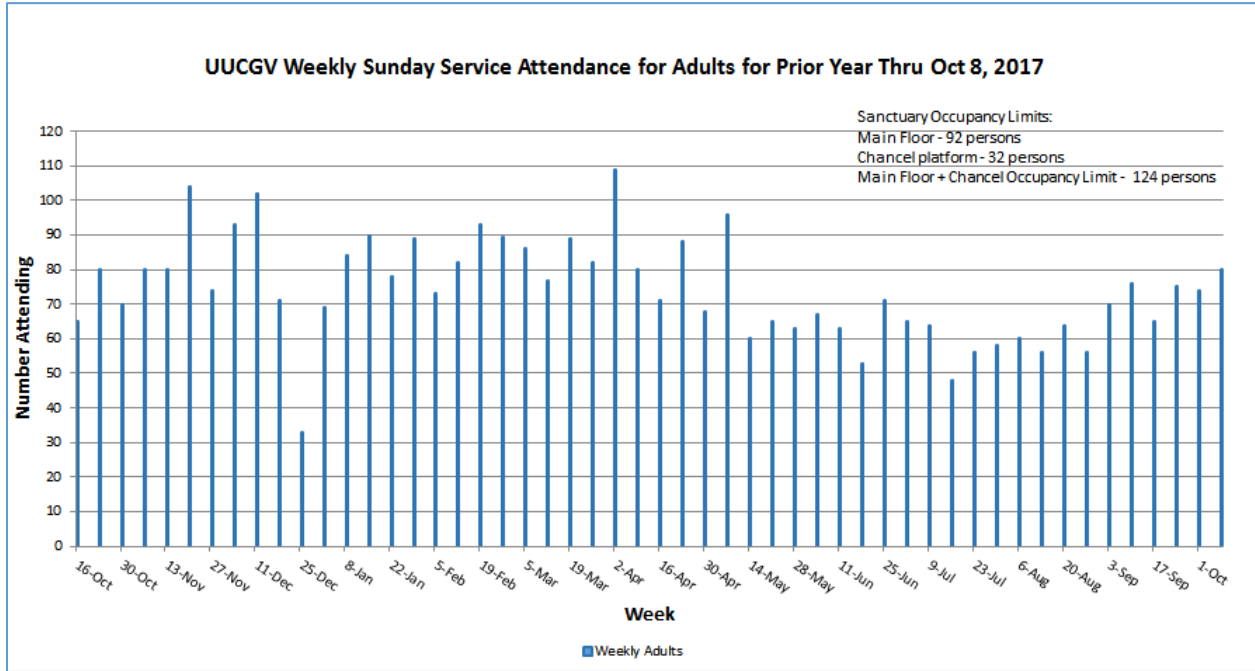


Figure 5 Weekly Adult Attendance for 1 Year through Oct, 2017

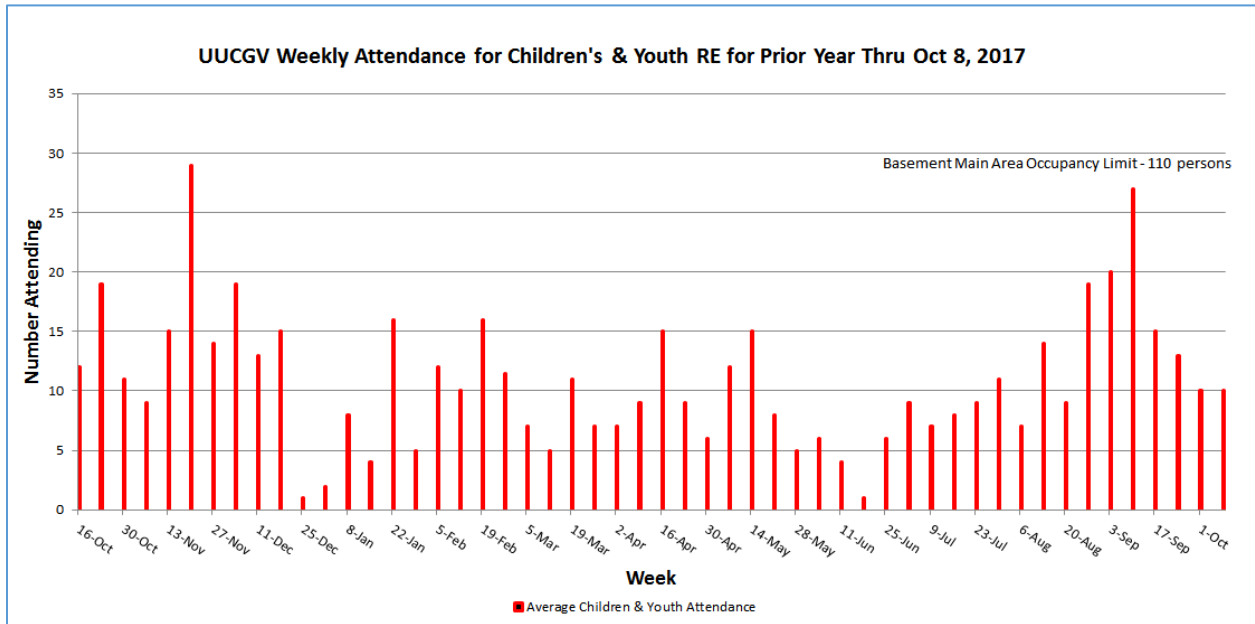


Figure 6 Children's and Youth RE Attendance for 1 Year through October, 2017

# Comparisons of UUCGV with Other MDD Congregations

The UUCGV is a member of the Mountain Desert District. A comparison was made of several factors between UUCGV and other MDD congregations of similar size (50 to 150 members). This 2017 data set comes from the UUA website.

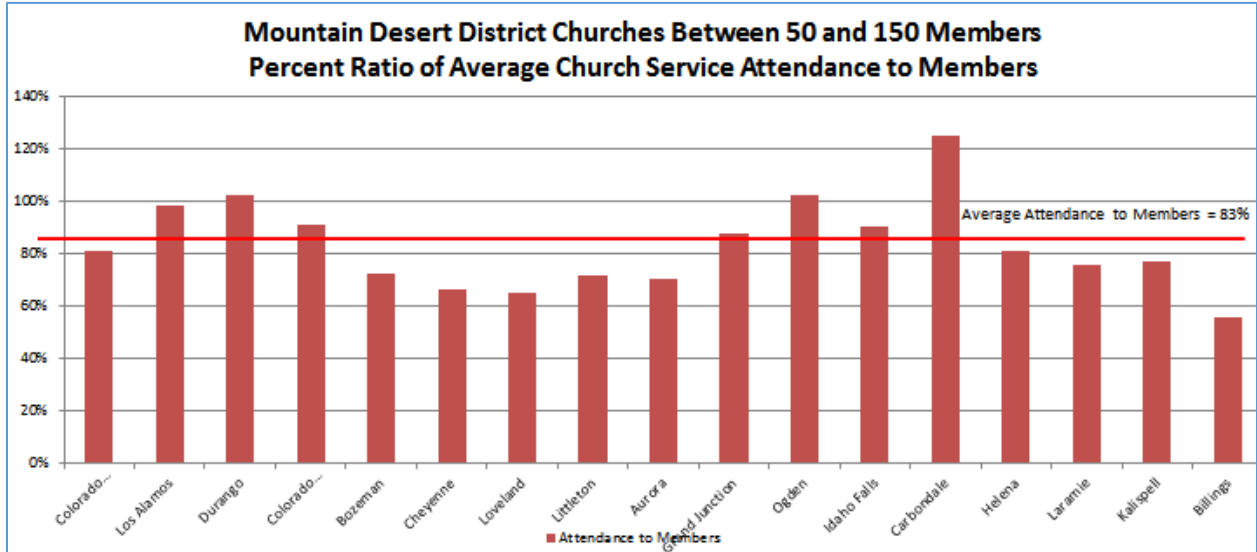


Figure 7 MDD Average Attendance to Membership Count

Figure 7 shows that the average attendance as a percentage of membership at UUCGV is about average at 83%.

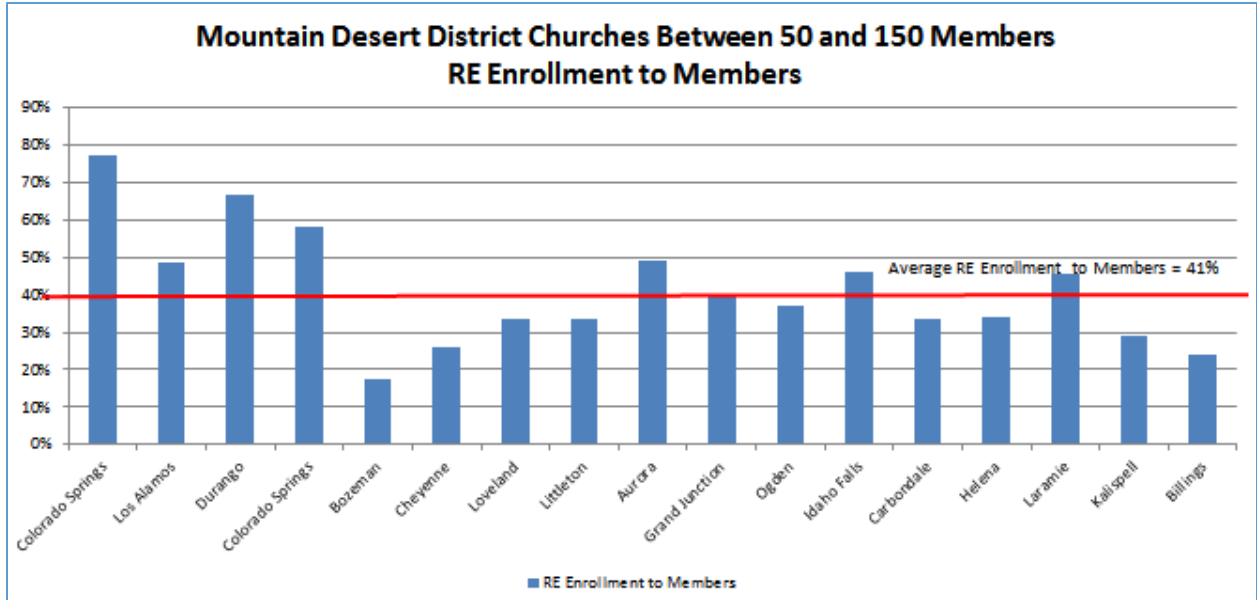


Figure 8 MDD RE Enrollment to Membership Count

Figure 8 shows that the average RE enrollment as a percentage of membership is about average, at 40%.

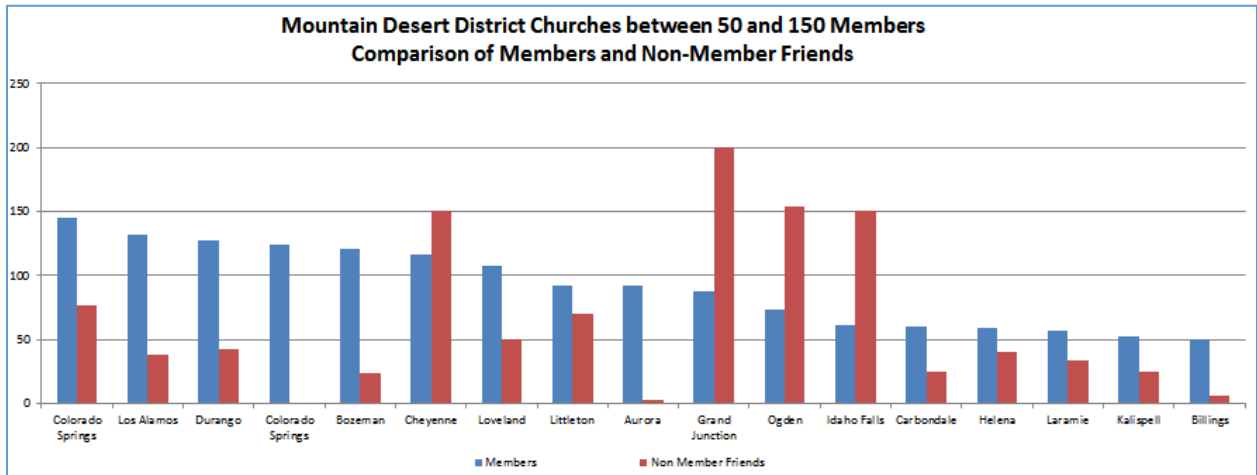


Figure 9 MDD Membership vs. Friends

The interesting statistic in Figure 9 is that UUCGV has by far the most Non-Member Friends (200) of any similar sized church in the MDD. Could we convert some of these to pledging members?



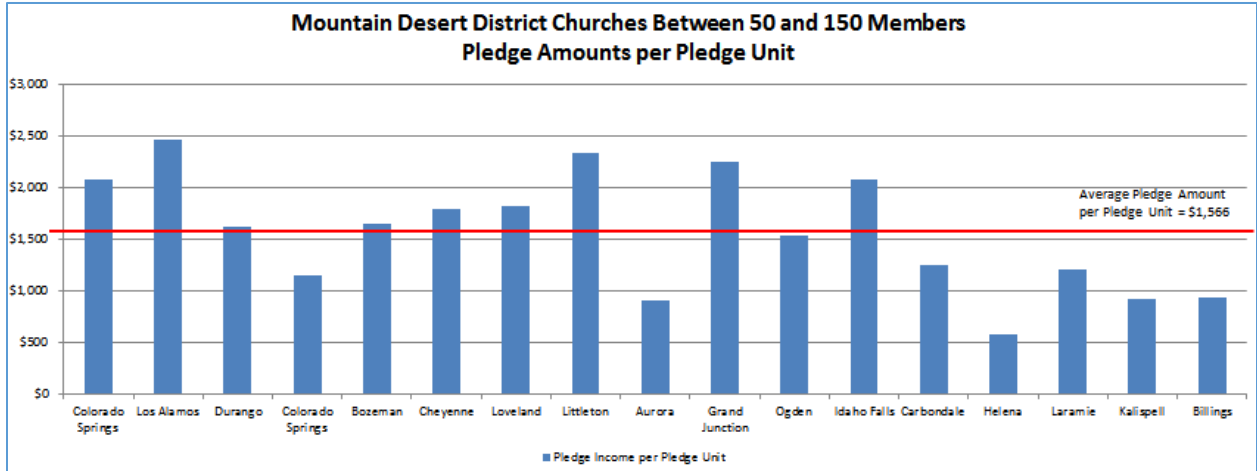


Figure 10 MDD Pledge Amounts per Pledge Units

Figure 10 shows that the average pledge at UUCGV per pledge unit is substantially above average, at \$2255 annually per pledge. This will be discussed in more detail later in this report.

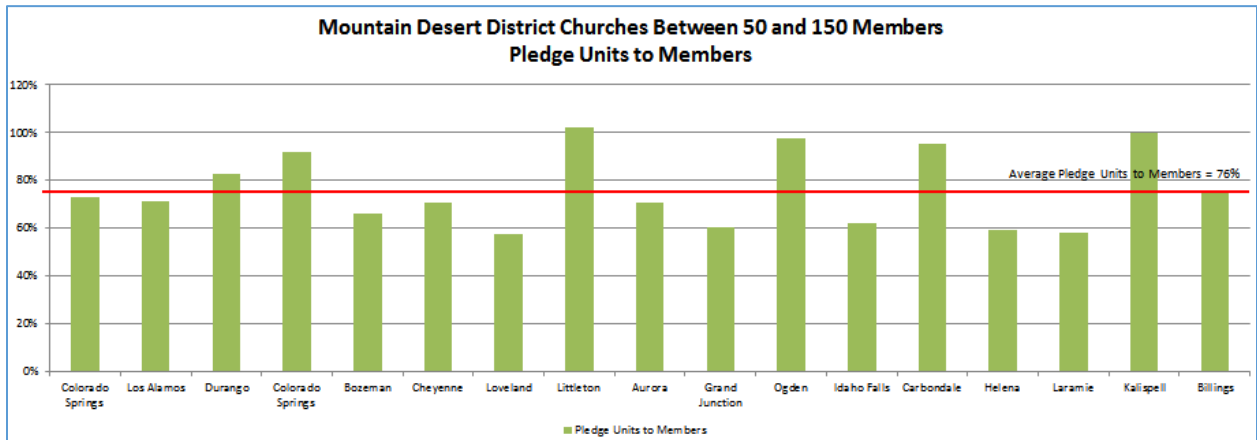


Figure 11 MDD Pledge Units to Membership Count

Figure 11 shows that the number of pledges for our membership is below average, at 60%. This statistic, when combined with the higher average pledge shown in the previous chart, means that we have fewer pledges, but larger pledges, than average. More will be said about this later in this report.

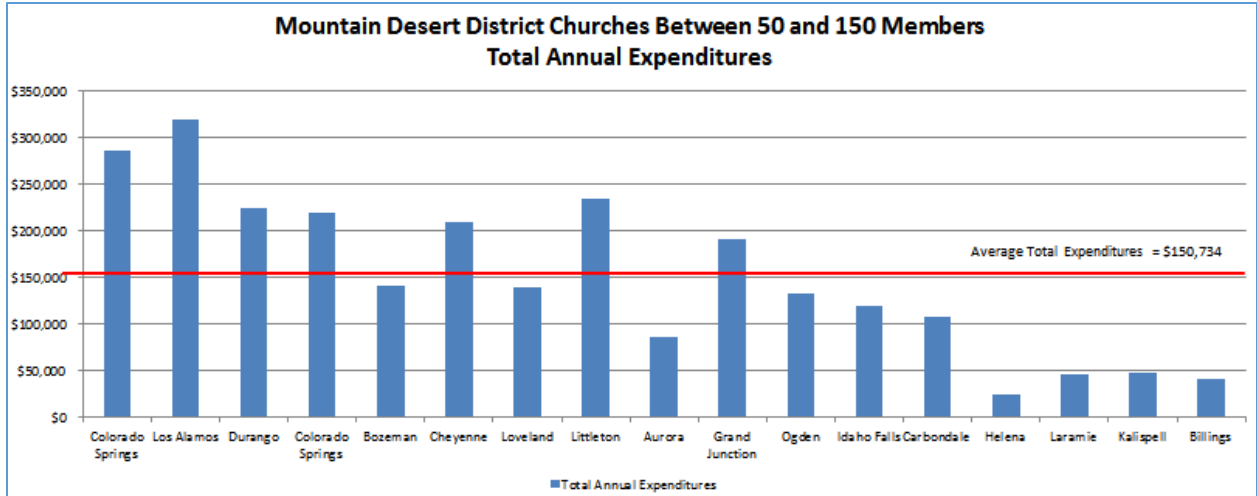


Figure 12 MDD Total Annual Expenditures

Figure 12 shows that UUCGV spends more than the average for our similar sized MDD churches. The UUCGV total annual expenditure shown here is \$190,415, compared to the MDD average of \$150,734.

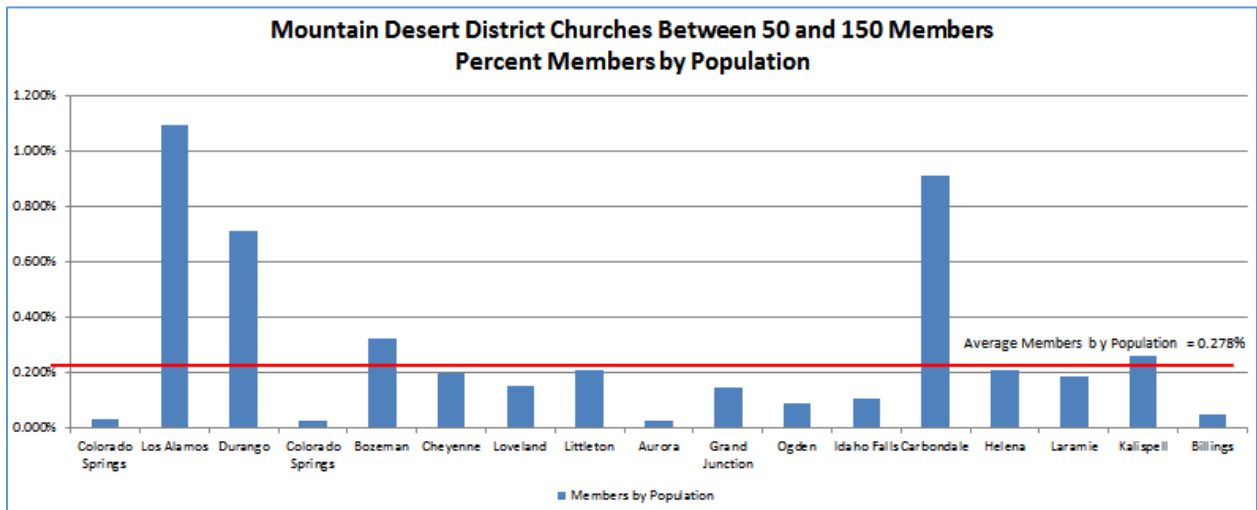


Figure 13 MDD Percent Membership by Population

Figure 13 shows that UUCGV has a lower percent of its available population as members. The MDD similar size congregation average is 0.278%, while UUCGV has 0.146% of the Grand Valley population. The best performing congregations are small liberal enclaves with small populations (Los Alamos, Durango, Carbondale).

MDD Comparison Recommendations:

1. Broaden our pledging to include more average size pledges so we are not so dependent on a few large pledges for our income.
2. Find ways to encourage friends to become members and volunteers.
3. Reach out to the Grand Valley population to attract new members.

# Financial Analysis & Projections

## Financial Goals

The Team has made Income and Expense projections for 5 years into the future (church years 2018-19 to 2022-23) based on historic financial data from 2002 to 2017 fiscal years.

The Team is concerned that there are projected to be income shortfalls in the next 5 years, particularly in the 3<sup>rd</sup> year after we start paying the mortgage. These shortfalls will be due to several factors, primarily the 2017-08 increases in staff salaries and the building mortgage payments of \$27,500 annually, which will commence on July 1, 2018. The Board has set aside a reserve fund to pay the first year of the mortgage in its entirety, and the current budget is setting aside \$16,000 to pay the interest on the second year of the mortgage. Thus, the full impact of the mortgage will occur in the third year after the start of payments.

Realizing that the vast majority of our income comes from member pledges and Sunday morning offerings, the Team recommends that the church explore all possible methods of increasing our income:

## Financial Recommendations:

1. It is imperative that the congregation understand the financial realities facing the church, and this will require careful and clear communications from the church leadership to the members and friends. This will need to be a continuing effort each year as our financial position evolves.
2. To maintain a balanced budget, we must add approximately 44 new pledging members by the 2020-21 church year (over the current level of 88 members), and maintain this level through the 2022-23 church year (see figure 28 and table 1). To accomplish this, we need to enhance the quality and relevance of our overall program in every area to attract and retain new members. We must insure that the Membership Team and Stewardship Team follow up on all new visitors.
3. Increase pledge giving from existing members and friends substantially where ever possible. The financial projections in this report assume an across the board average of 5% year on year. The Stewardship Team says that this may be an unrealistic goal, as people aren't willing to increase their pledge this often.
4. Broaden our pledge giving to not rely on a few very large pledges for a significant part of our income. The Top 3 pledges currently make up 46% of our pledge income.
5. Increase the results from fund raising efforts. Over the next 5 years, strive for an increase in auction proceeds by 5% year over year, and yard sale proceeds by 5% year over year.
6. The 2017-18 level of building rental activity is as much as the staff and church schedule can handle. To gain more income from rentals, we will need to raise our rental rates by an average of 5% a year. We should explore establishing a Building Rental Team (or a volunteer) to assist Mallory and Sterling with building rentals to reduce the administrative and labor cost of rentals.
7. Add special fund raising events, such as music series and guest speakers, and create a new Special Events Team to manage these events. We should strive for a minimum of \$1500 in Special Event income for 2018-19, and increase that by 10% year over year through 2022-23.

8. Establish a capital project funding system by encouraging gifting through congregant estate planning. Create an endowment fund for the future of the church with a goal of \$500,000.
9. Manage our expenses by relying on volunteers wherever possible to make the existing staff as efficient as possible, to avoid needing to add more staff persons and more staff hours. The projection is that staff and Minister's salaries will increase by 2.5% annually, and a new staff salary of \$10,000 will be added in 2018-19 for a student intern Minister. The church should strive to offer competitive salaries wherever possible, and provide merit increases where justified.

Each of these goals and growth projections will be discussed below and shown in the associated charts.

### Budgeted Income and Expense Pie Charts

Two sets of income and expense pie charts are show below – for the current fiscal year, 2017-18 (figures 14 & 15), and for 2020-21 (figures 16 & 17). These two years were chosen to illustrate the financial situation in the current church year, and the effect in 3 years from now of the full impact of the building mortgage.

The values and assumptions for these sets of charts are given in the summary table at the end of this report in Appendix 4. Highlights of the assumptions behind these charts are:

- Annual mortgage payments of \$27,500 starting in 2018-19, with the first year already saved in entirety by the Board, and the second year's interest of \$16,000 will have been saved during the current budget year. Thus the full impact of unfunded mortgage payments is first felt in the 2020-21 church year. These financial projections assume that the mortgage payments will be due starting in church year 2018-19. Staff salaries increase 2.5% each year. A Student Intern Minister is hired in 2018-19 at salary of \$10,000 per year.
- Pledge and Sunday offering income grows at the trend of 2014-17 values, plus a 2.5% inflation rate per year
- The Minister continues at 25 hours per week for the next 5 years
- Non-pledge income from all sources increases at 5% per year

### 2017-18 Income and Expense Pie Charts

The next two charts (Figures 14 & 15) show the income and expenses from 2017-18 budget. Note the red slice on the Income Chart that shows that the budget was passed by the Board with a \$5,636 shortfall in income. The bulk of income is from pledges (72%), and Offerings (8%).

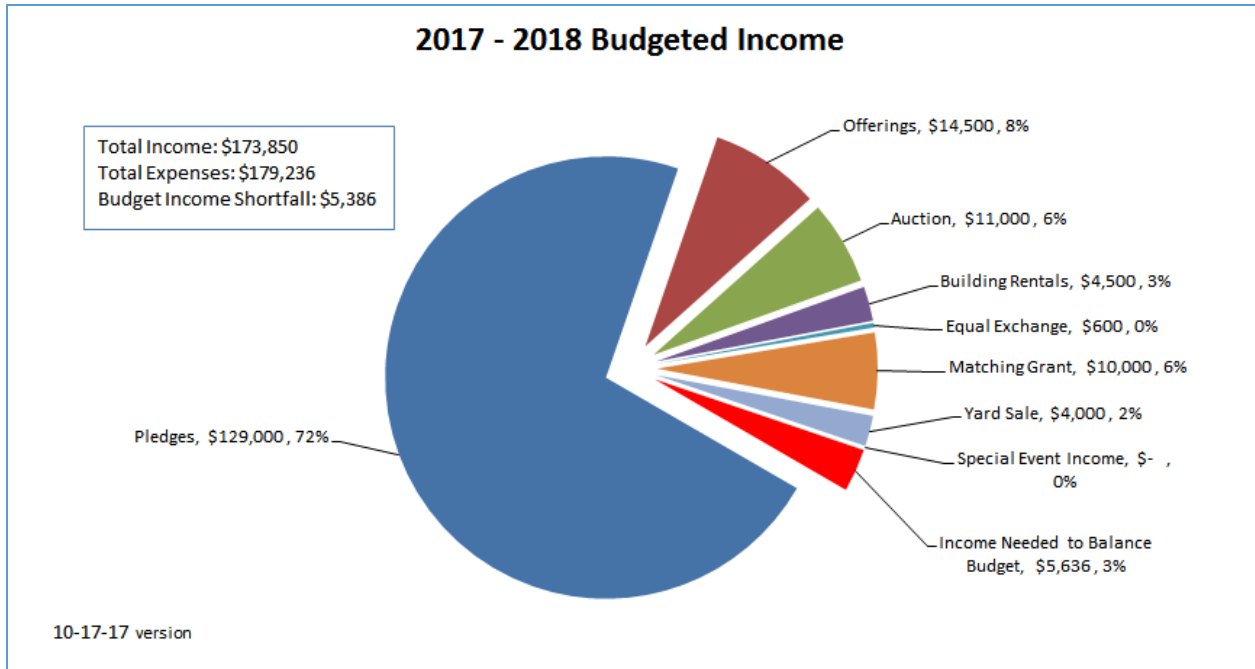


Figure 14 2017-18 Income Pie Chart

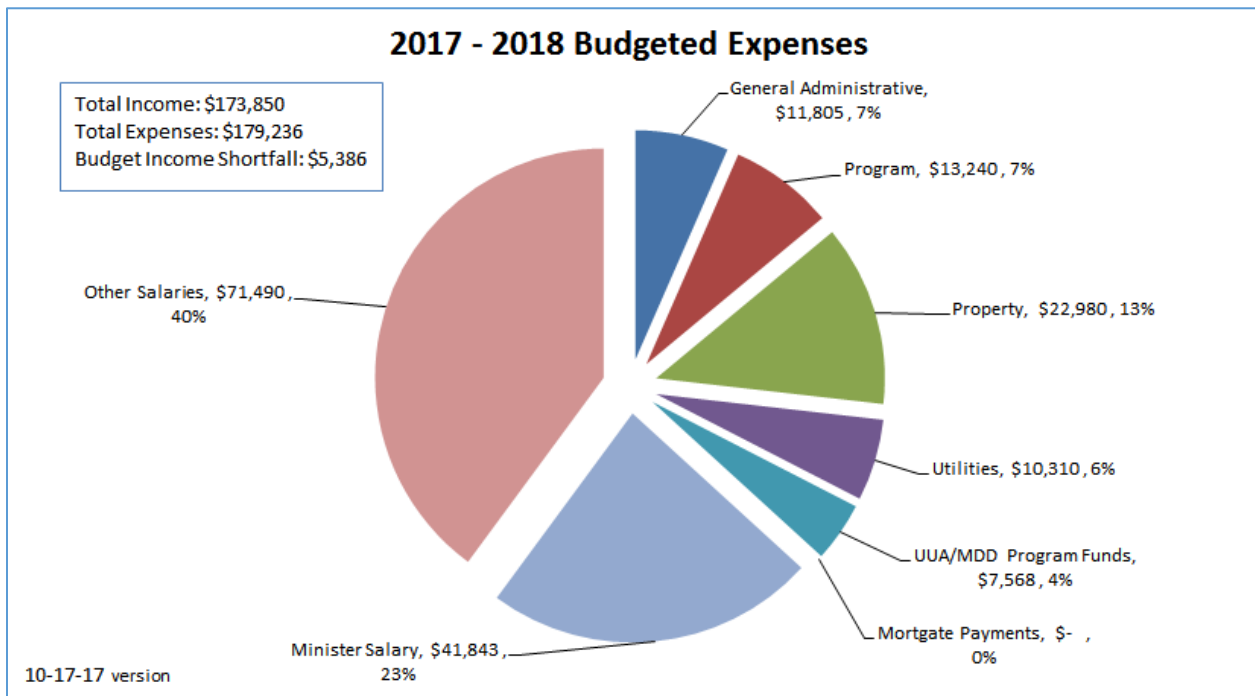


Figure 15 2017-18 Expense Pie Chart

#### 2020-21 Budgeted Income and Expense Pie Charts

The next two charts (Figures 16 & 17) show the income and expenses from the Fiscal Year 21 (July 1, 2020 thru June 30, 2021) projected budget. Note the red slice that shows that there is a projected shortfall of \$34,331 in income. This is due mainly to the assumption that the 536 Ouray mortgage payment of \$27,500 will be due in full for that year.

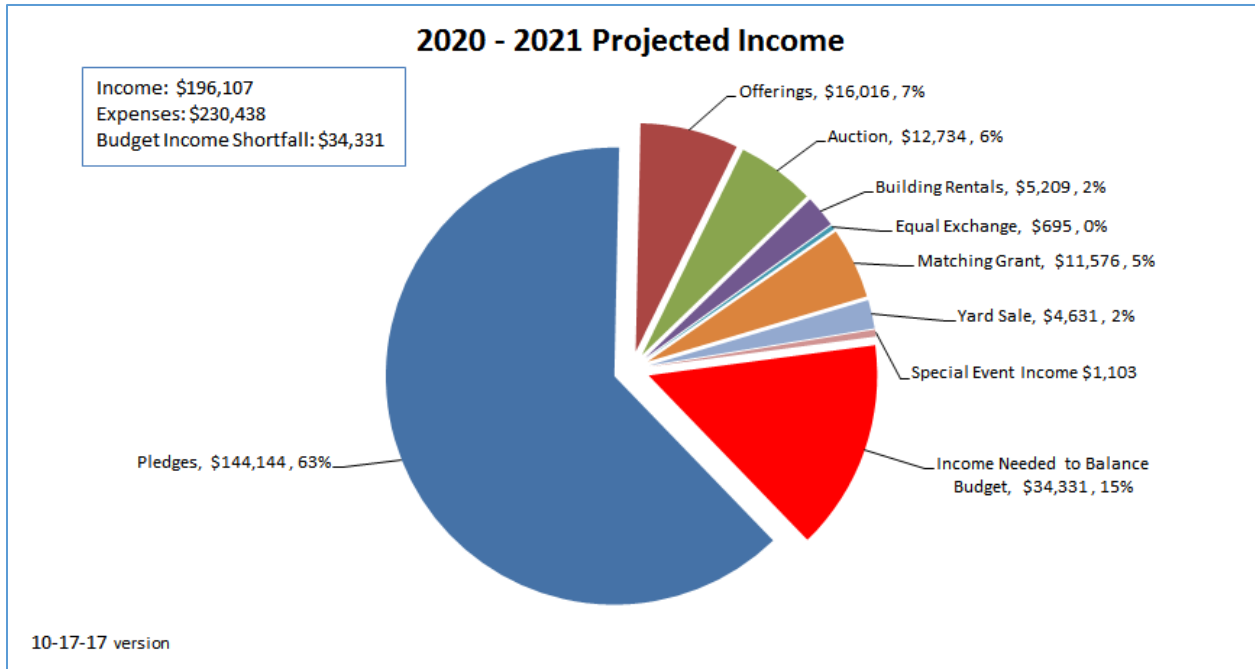


Figure 16 2020-21 Income Pie Chart

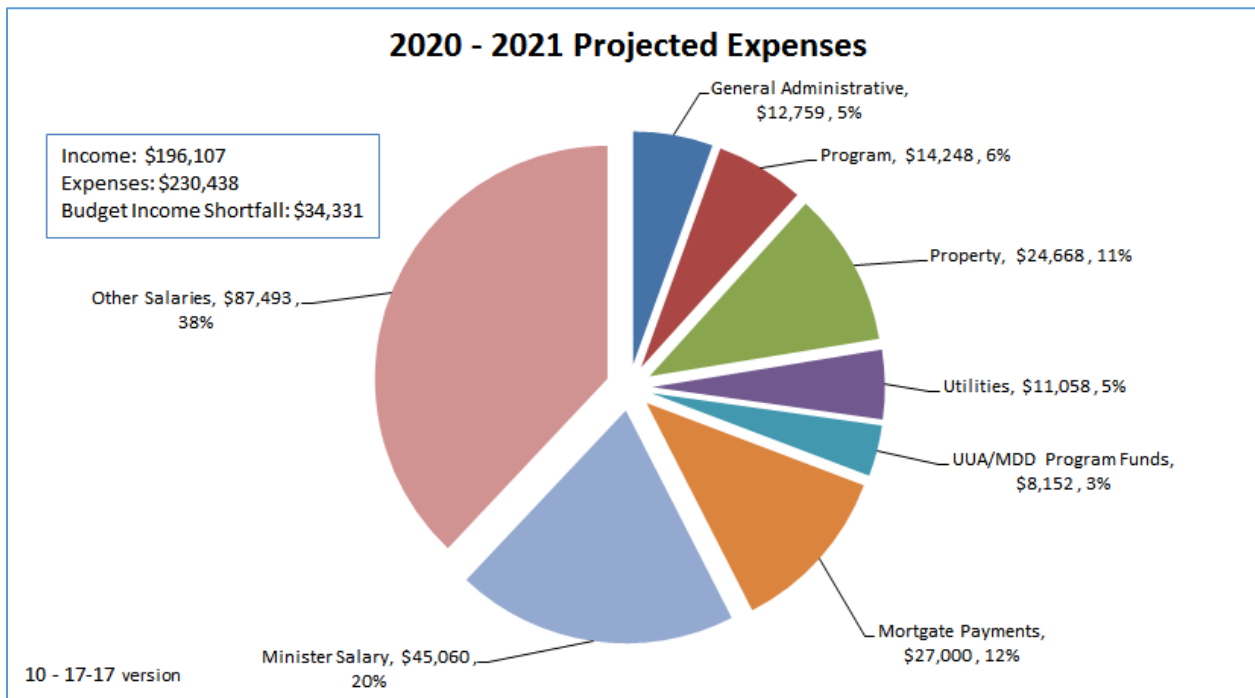


Figure 17 2020-23 Expense Pie Chart

### Budgeted and Projected Income Shortfalls

Figure 18 shows income less expenses from 2001-02 through 2017-18, with projected income less expense values for 2018-19 through 2022-23. This assumes that the full 536 Ouray mortgage will be payable starting in 2018-19. There are reserves set aside for the full mortgage payment of \$27,500 in

2018-19, and \$16,000 set aside for 2019-20, so the full impact of the mortgage payment hits in 2020-21.

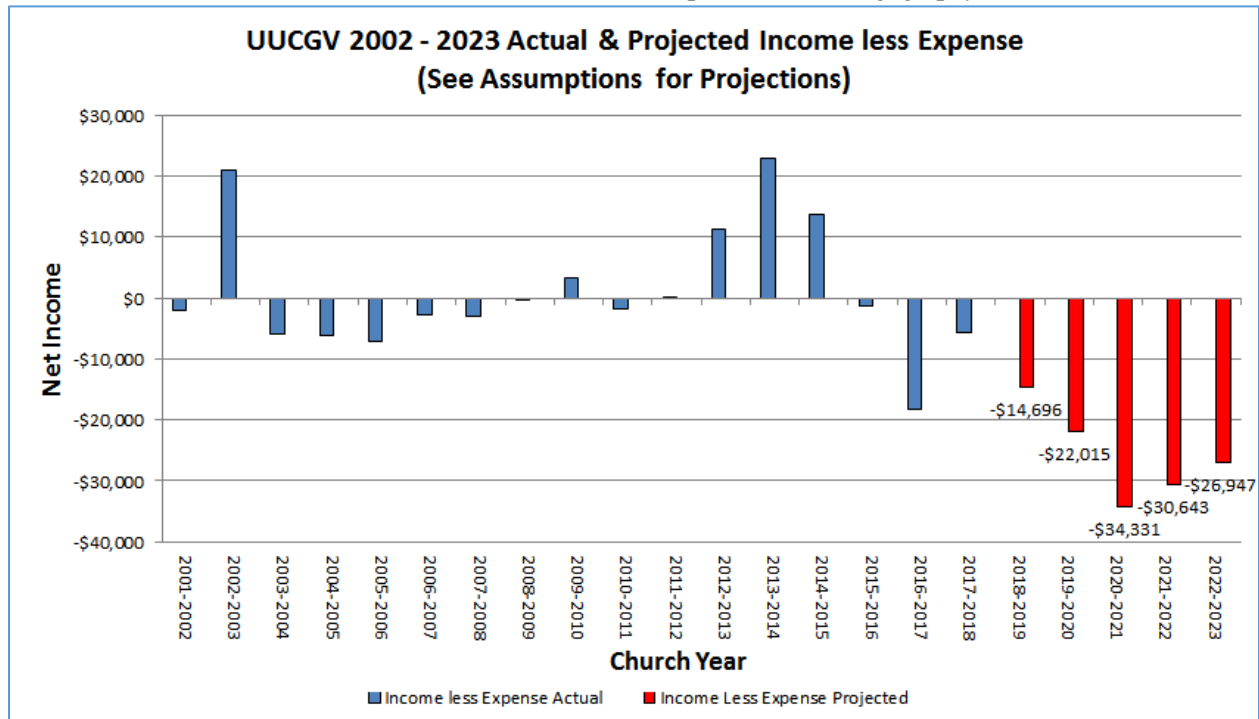


Figure 18 Historic & Projected Income Less Expense

## Pledge & Offering Income

### Stewardship Pledge Campaign

The stewardship campaign is held each spring to solicit pledges from members and active friends for the upcoming fiscal year, that starts July 1<sup>st</sup>. In recent years, a social event has been held to entice potential pledgers to attend, have a fun time, and commit to their pledges. The budget for the upcoming fiscal year depends largely on the success of the pledge campaign.

A pledge can be from an individual, a couple, or a family. Each pledging entity is called a “pledge unit”. The average percentage of pledge units to members for church years 2014 through 2017 has been 82%. This percentage does not include Active Friends, but the number of pledges from Active Friends is small (see below).

### Historic Pledge Units and Membership

Figure 19 shows historic pledge units and the corresponding number of members for each church year. There are no pledge units shown for 2017-2018 as the pledge drive for this church year has not occurred yet (in the Spring of 2018). These values are from the certified numbers provided by UUCGV to the UUA in February of each year. This number of members is used by the UUA and MDD to assess the amounts of dues that we owe.

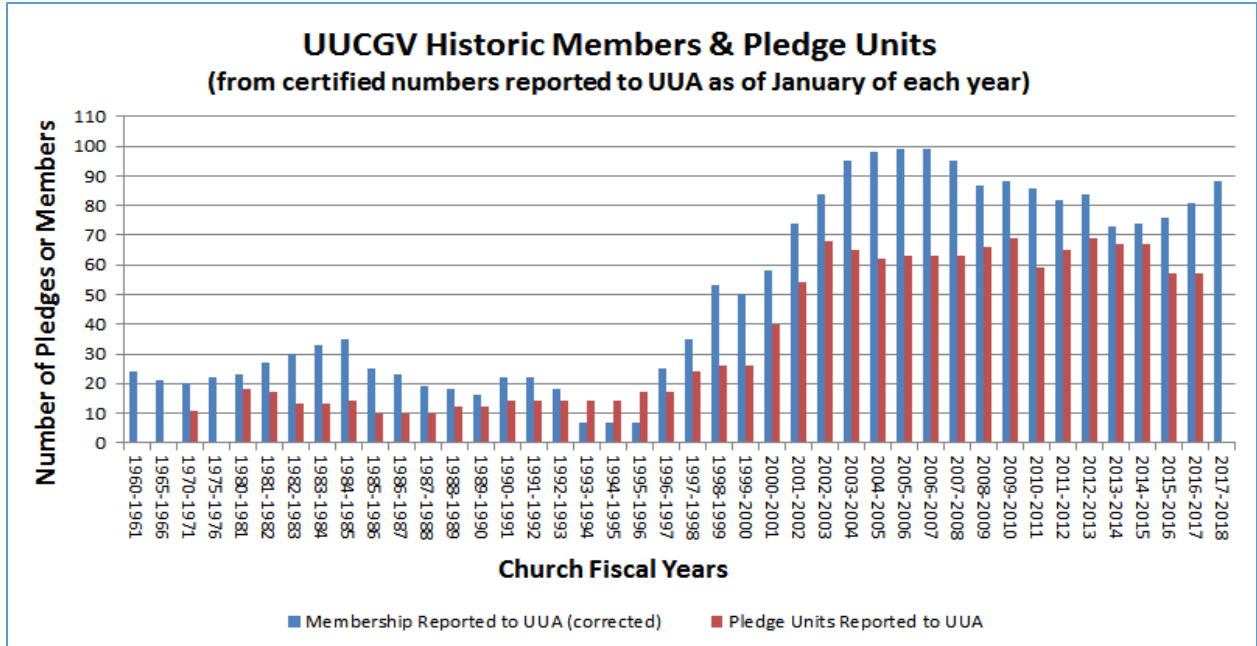


Figure 19 UUCGV Historic Membership & Pledge Units

Historic Pledge Income

Figure 20 shows historic pledge income from fiscal year 03 to the current fiscal year. It can be seen that pledge income trended down from FY12 to FY15, but has now begun trending upward again.

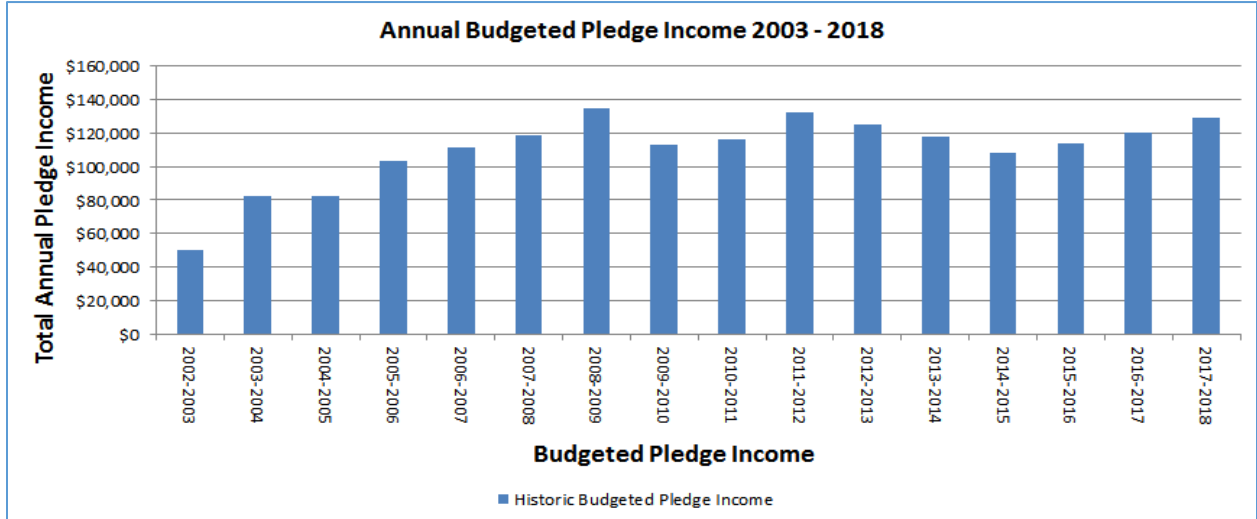


Figure 20 UUCGV Annual Budgeted Pledge Income 2003-2018

Pledges Plus Offerings

Perhaps the best indication of congregant giving is to combine pledges with Sunday service collection offerings. The next chart (Figure 21) shows pledge + offering income for FY14 through FY18.



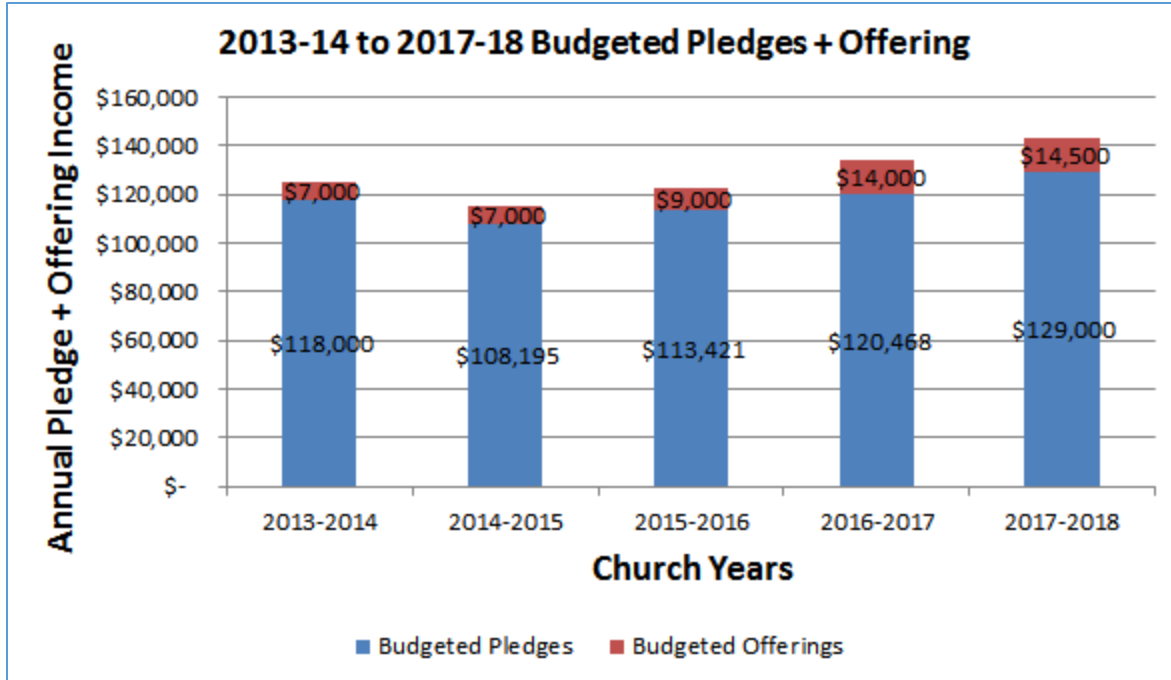


Figure 21 Budgeted Pledges & Offering 2014-2018

**Member and Active Friend Pledging**

We divide friends of the UUCGV into two categories. “Active” friends are those who pledge and participate in church activities but have not signed the membership book. “Friends” are people with a long history with the church, including former members, who attend special events but do not pledge. There are currently 71 Active Friends, and 89 Friends (as of Oct/2017). Figures 22 and 23 below refer to “Active” friends only.

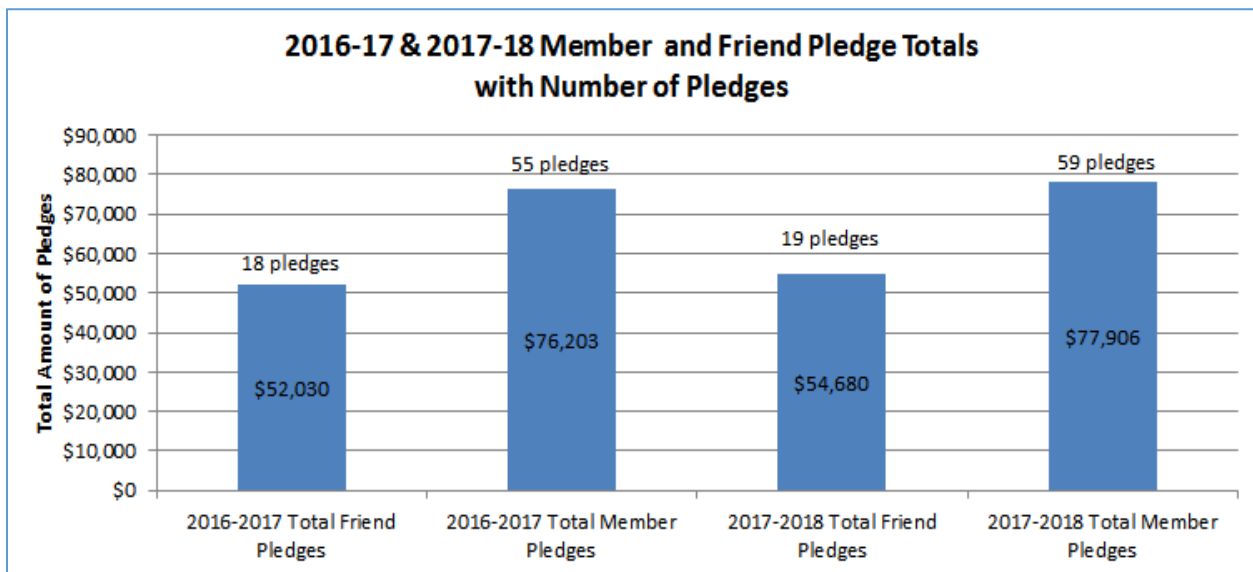


Figure 22 Member & Friend Pledge Totals 2017 - 2018

Figure 22 above shows that the total friend pledges is just over \$50,000 for each year, making up about 41% of total pledge amounts for each year. The count of Active friend pledges for each year is 18% and 24% respectively of total pledging. Comparing the amount of Active friend pledges with the Active friend counts shows that a relatively small number of friends represent a significant amount (about 41%) of total pledging for each of the years.

In Figure 23 below the top 3 pledge amounts make up 93% and 89% respectively of the friend pledges in 2016-17 and 2017-18. In the member pledges, the top 3 make up 29% and 26% respectively of the 2016 and 2017 member pledges. The conclusion is that while friend pledges are an important contributor to overall pledge income, the amount of friend pledge income is almost totally due to the top 3 friend pledgers.

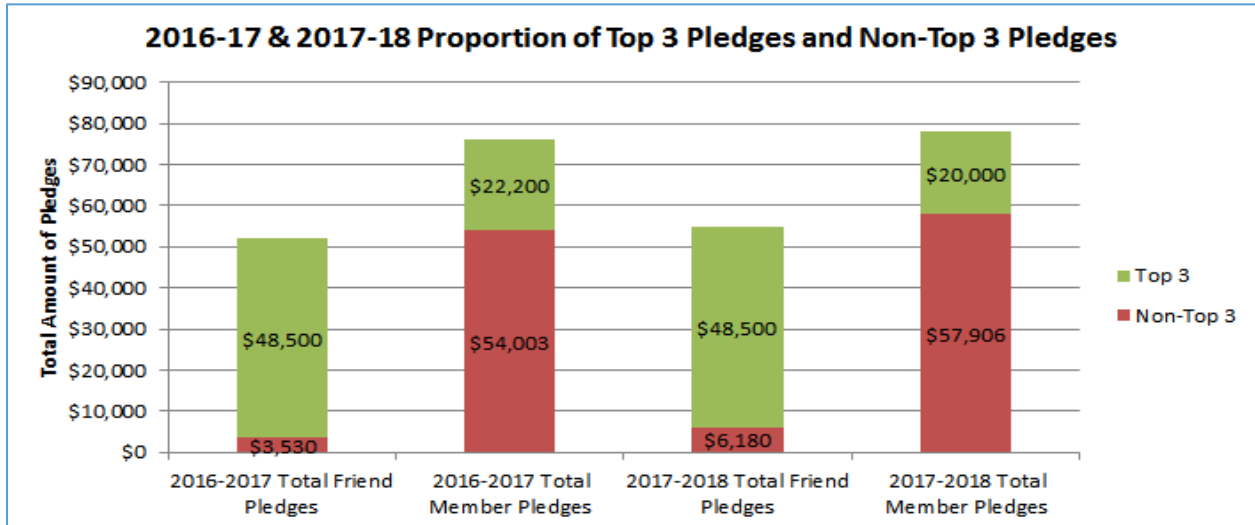


Figure 23 Proportion of Top 3 & Non Top 3 Pledges 2017 - 2018

Distribution of 2017-2018 Pledge Amounts

The next chart (Figure 24) shows the number of pledges by pledge amount. The counts are collected in “bins” which increase by \$100 for each step. So any pledge between \$1 and \$100 would be counted in the \$100 bin. For example, there are 14 pledges ranging from \$0 to \$100. There are 8 pledges ranging from \$101 to \$200, etc. The top 3 pledge amounts of \$45,000, \$8,500, and \$7,500 are not shown on this chart because of their large disparity in amount, compared with all other pledges. While these Top-3 pledges are very important as income for the church, for purposes of analysis and planning, the Top 3 pledges are disregarded in some of the following analysis since they are atypical and unlikely of the pledges we would expect when adding new members.

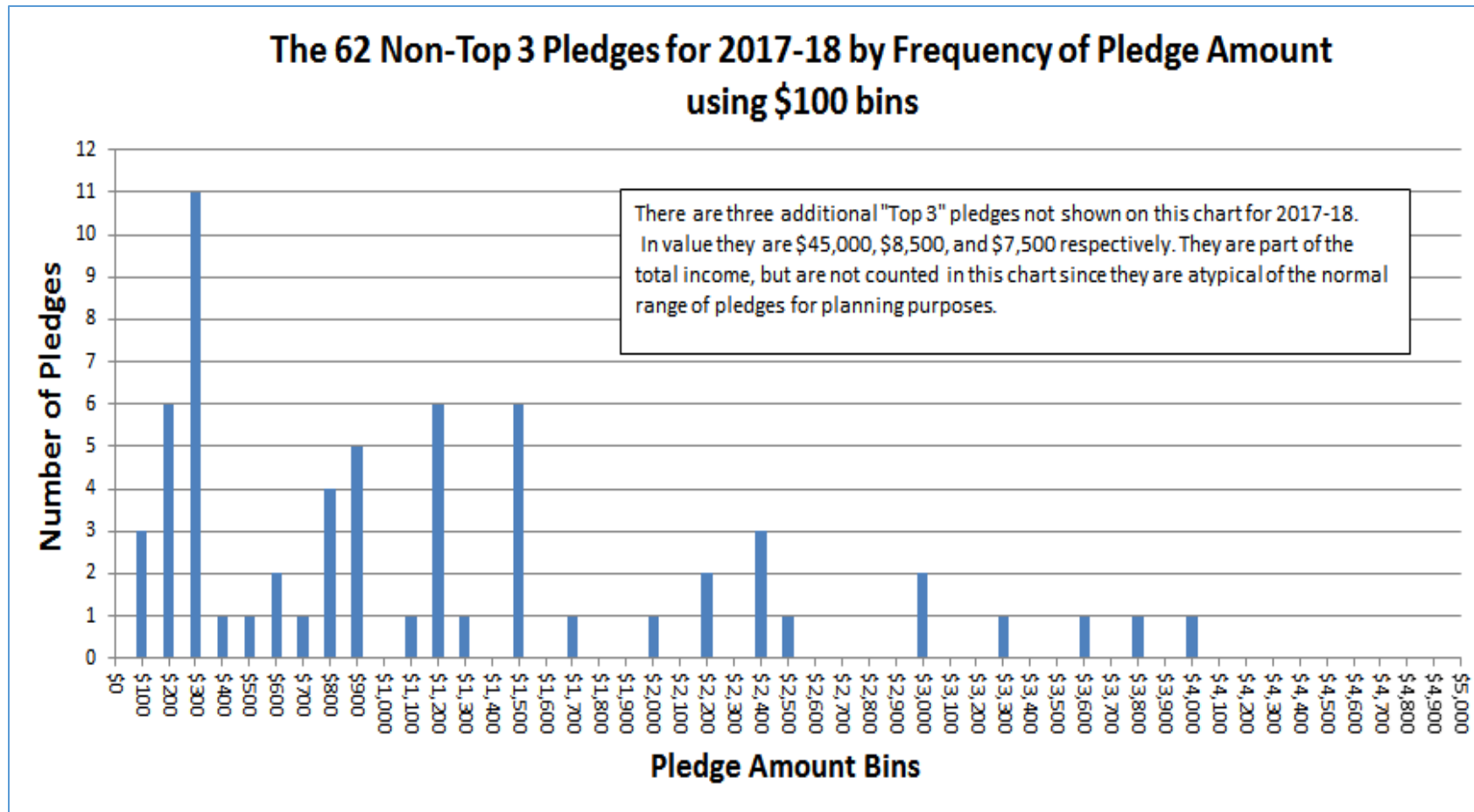


Figure 24 Non-Top 3 Pledges by Frequency of Amount 2018

The following chart (Figure 25) shows the contribution to the overall 2017-18 income of the church by the various pledge amounts as percentages of total pledge income for the current fiscal year, July 1, 2017 thru June 30, 2018). The top single pledge (\$45,000) makes up 34% of the total

income of the church. The top 3 pledges make up 46% of the \$132,586 in pledge income for the year. The top 5 pledges make up 52% of the total income. The top 30 pledges make up 89% of total income, while the remaining 35 pledges make up 11% of total income.

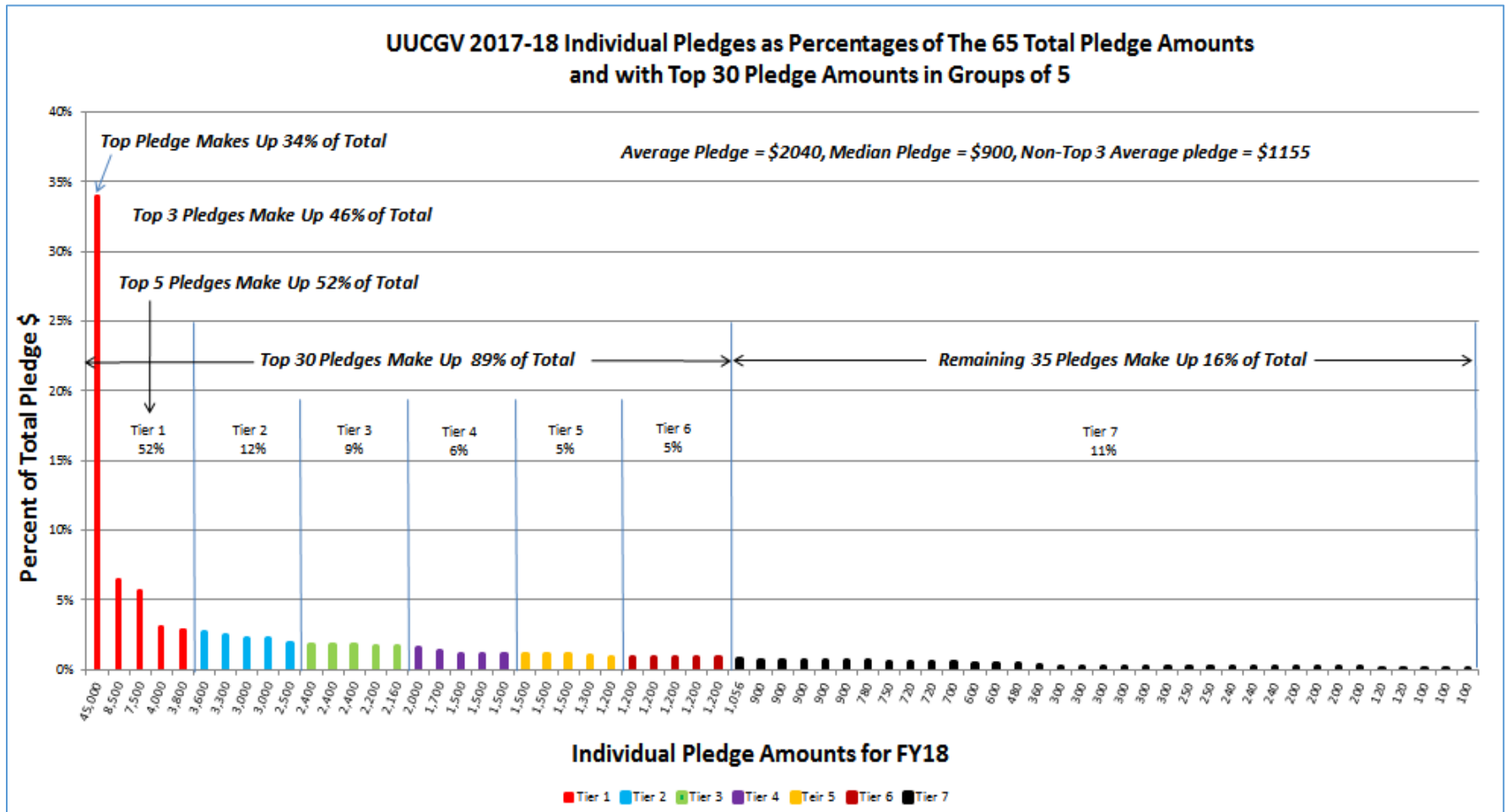


Figure 25 Individual Pledges as Percentages of Total for 2017-18

**Number of Pledges Required to Make up Budget Shortfalls**

Based on the income and expense projections discussed above there will be a need for additional pledges to cover the projected budget shortfalls projected for 2020-21 and beyond. It is misleading to simply take an average pledge amount and divide that into the shortfall amount to get the number of pledges required. Pledges fall along a scale of annual amounts, starting at \$100 a year, going up to \$45,000 a year. If you look at the 2017-18 pledge amounts, you can see the total contribution of each category of pledges in the next chart. For example, pledges of \$900 a year contributed about \$4500 in total income for the 2017-18 church year.

The previous pie charts (figures 16 & 17) showing projected income and expense for church 2020-21 shows a projected budget shortfall of \$34,331. Figure 26 below shows the pledge income distribution for 2017-18. The x-axis is the categories of pledge amounts that people make. They x-axis values are really “bins” that contain a certain range of pledge amounts. For example, the \$900 category contains all the actual pledges that people made from \$801 to \$900. The y-axis is the total amount of money that each category of pledge contributed to the 2017-18 income. So if 2020-21 has the same distribution of pledges as 2017-18, then the total amount of pledges in red (which number 29 total pledges) on the chart would be close to adding up to the \$32,126 income shortfall in 2020-21. In other words, it would take the 29 pledges to make up the budget shortfall of \$32,126. If you just divide the shortfall by the average pledge, you get a required number of pledges of 26. Since the ratio of pledges to members is 82%, to get 26 new pledges you need to add 32 new members.

Using the distribution of typical pledges is more realistic for planning how many new pledges we really need.

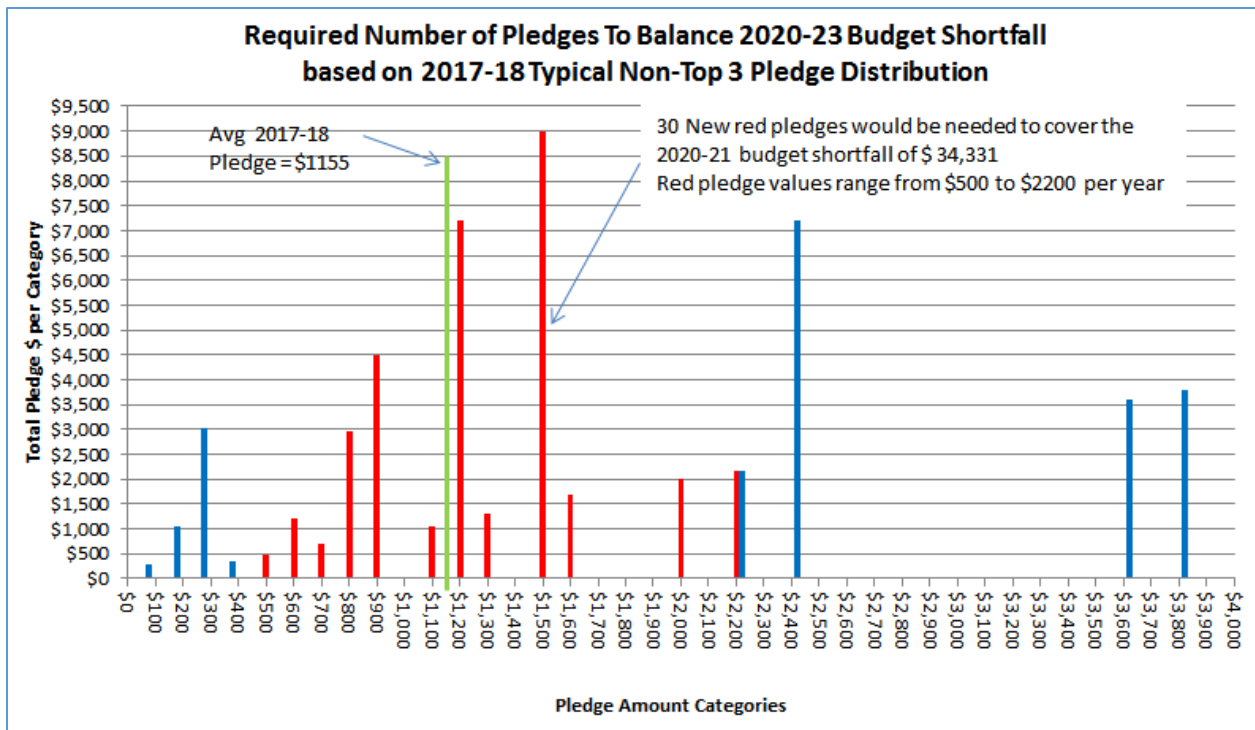


Figure 26 Pledge Distribution to Balance Budget Shortfalls

Number of Additional Members Needed to Balance Budgets

Figure 27 shows the historic membership from church year 2001-02 to 2017-18. The Trend projected membership numbers are based on the trend in membership growth from 2013-14 to 2017-18 numbers. The additional members needed to balance future budgets (2018 through 2023) are calculated using the same pledge distribution technique as shown in the chart above for each future year. This value excludes the top 3 pledge values. The values and assumptions for these charts are given in the summary table in Appendix 4 at the end of this report.

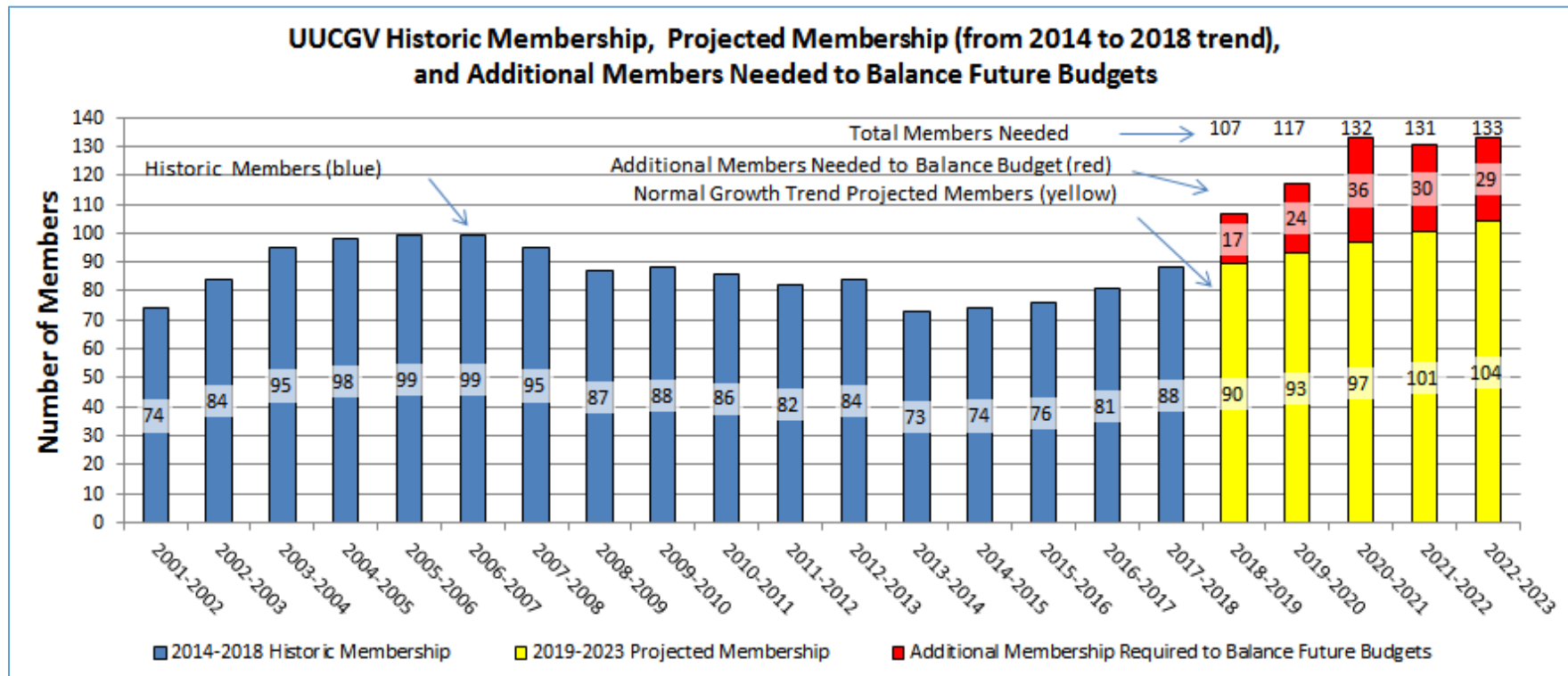


Figure 27 Projected Membership to Balance Budget Shortfalls 2019-23

*Table 1. Summary Table of additional pledge units and member numbers required to balance budget shortfalls for church years 2019 – 2023.*

Church Year	Projected Income Shortfall	Projected Growth of Members based on Historic Membership	# of Additional Pledges Needed to Balance Income Shortfalls	# of Additional Members Needed to Balance Income shortfall	Total # of Members
2018-19	\$ 14,696	90	14	17	107
2019-20	\$ 22,015	93	20	24	117
2020-21	\$ 34,331	97	30	36	132
2021-22	\$ 30,643	101	25	30	131
2022-23	\$ 26,947	104	24	29	133

#### Attendance Implications of Adding Members to Balance the Budget

The next chart (Figure 28) shows actual average adult and RE attendance on Sundays from 2014-15 to 2017-18, along with projections of Sunday Service attendance and RE attendance for the next 5 years. The adult and RE attendance trends for 2014-18 were not followed in creating this chart, since the Team is recommending that the membership levels be significantly increased over the next 5 years to balance budget shortfalls.

The projected adult attendance numbers shown in Figure 28 are based on the number of pledges required to balance the budgets over the next 5 years (discussed above), and the average ratio of attendance to members during the last 4 years (79%). That ratio ranges from a low of 72% in 2017-18-15 to a high of 83% in 2016-17.

The projections of children's and youth RE attendance in Figure 28 is derived by the average ratio of RE Sunday attendance to Adult Sunday attendance over the last 4 years (20%). That ratio ranges from a low of 14% in 2016-17 to 29% in 2014-15.

It can be seen that Adult Sunday average attendance starting in 2020-21 potentially exceeds the fire code occupancy limits for the sanctuary, depending on the occupancy numbers on the chancel (32 persons maximum) and on the main sanctuary area (93 persons maximum). This creates the possibility of needing to have 2 worship services starting in 2020-21. See Appendix 2 for a discussion of various scenarios of how 2 worship services could be accomplished. The Team is recommending that the Worship Team start to make separate counts of people in the chancel area, the main sanctuary floor, and the kitchen area, which is allowed to hold 13 seated persons maximum in a overload situation (with no tables set up).

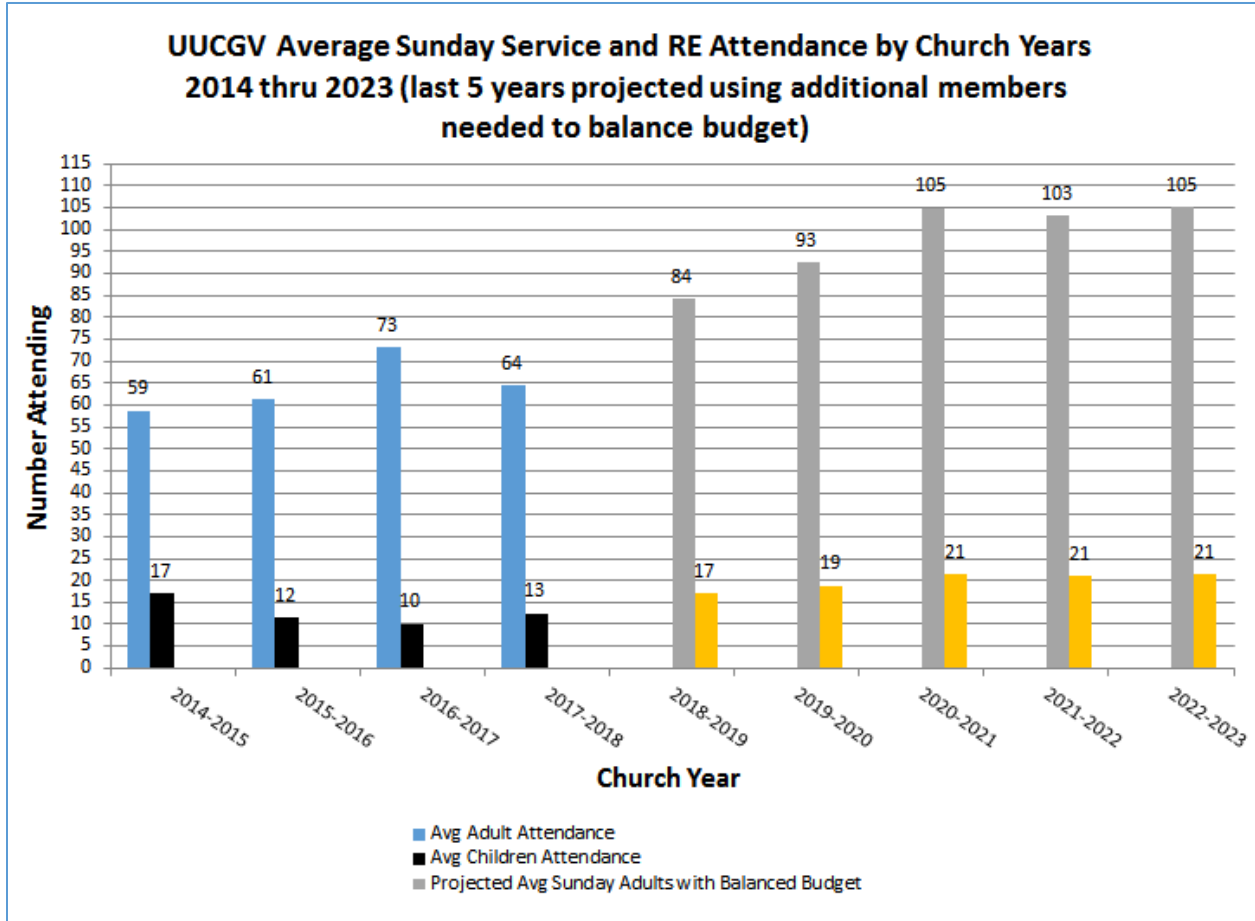


Figure 28 Projected Adult & Children's Attendance 2019-2023

## Non-Pledge Income

### Auction

Figure 29 below shows auction net income as budgeted, and actual results through 2016. The auction results for 2017 Two things can be noted in this chart – first, planning for a budgeted amount of income often does not match the actual income yielded by the auction; and second, the net income from auctions has not been as good since FY10. It is not known exactly when the use of professional auctioneers was stopped, but this could explain some of the reduced income experienced since FY10. The lower income could also be due to reduced enthusiasm of the congregation to contribute through auctions. The third possible cause for reduced income might be that FY10 (July 2009 to June 2010) coincides with the financial recession, so people may have felt they had less money to spend on contributions to the church.

Auction net income is an important component of total income for the church, representing \$11,000 (6%) of the budgeted income for 2017-2018. There are two differing opinions about using the auction to fund the operating budget of the church. One opinion is that the auction should be part of the operating budget income, but others feel that the auction should not be relied on as part of the operating budget.

Their argument appears to be that we could do more for community causes if we could donate all the auction money to the community. But with a projected income shortfall in the next 5 years, it is likely that including auction income in the operating budget will continue to be necessary.



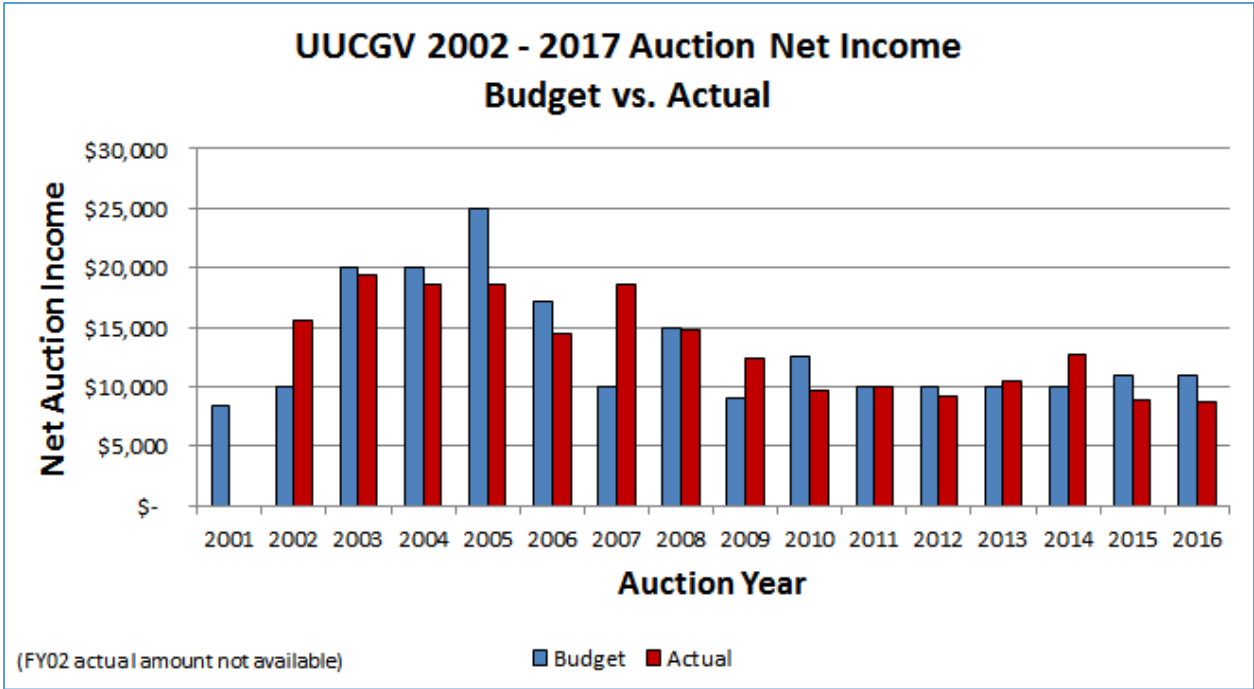


Figure 29 Auction Net Income Budget vs. Actual 2002-17

Yard Sale

Figure 30 below shows yard sale income from 2009 thru 2017. Yard sales are not held every year. The average income from these yard sales is \$2909. The years 2014-2015 and 2015-2016 were sales where congregants were moving and we had a lot of household items to sell, resulting in above average income for those 2 years.

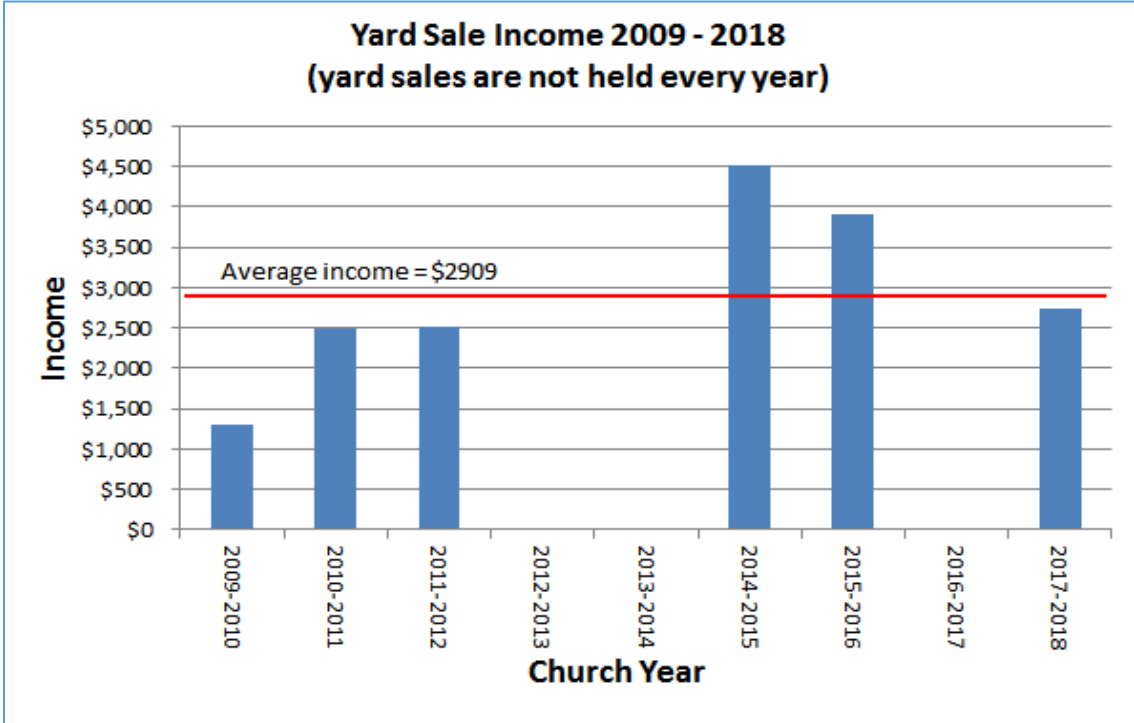


Figure 30 Yard Sale Income 2009-17

**Building Rentals**

Rental use of our building has been growing. By renting our space, we gain added income, and bring in guests who may not be familiar with our congregation. This can be a source of new members, and should be encouraged, to the extent that rental activities do not interfere with the regular church program. A significant amount of time is required from the Church Administrator (Mallory) to manage these rentals. At least an hour per week, for example, is required by Mallory just to support the use of the Audio/Visual system by the renters. Also, rental setup and takedown activities require significant time and effort by Sterling, the Facilities Manager.

Figure 31 shows budgeted and actual rental income for the last 3 years, since we have been in the new building. The projected income assumes that rental income can be increased 5% each year over the 2017-2018 budgeted number.

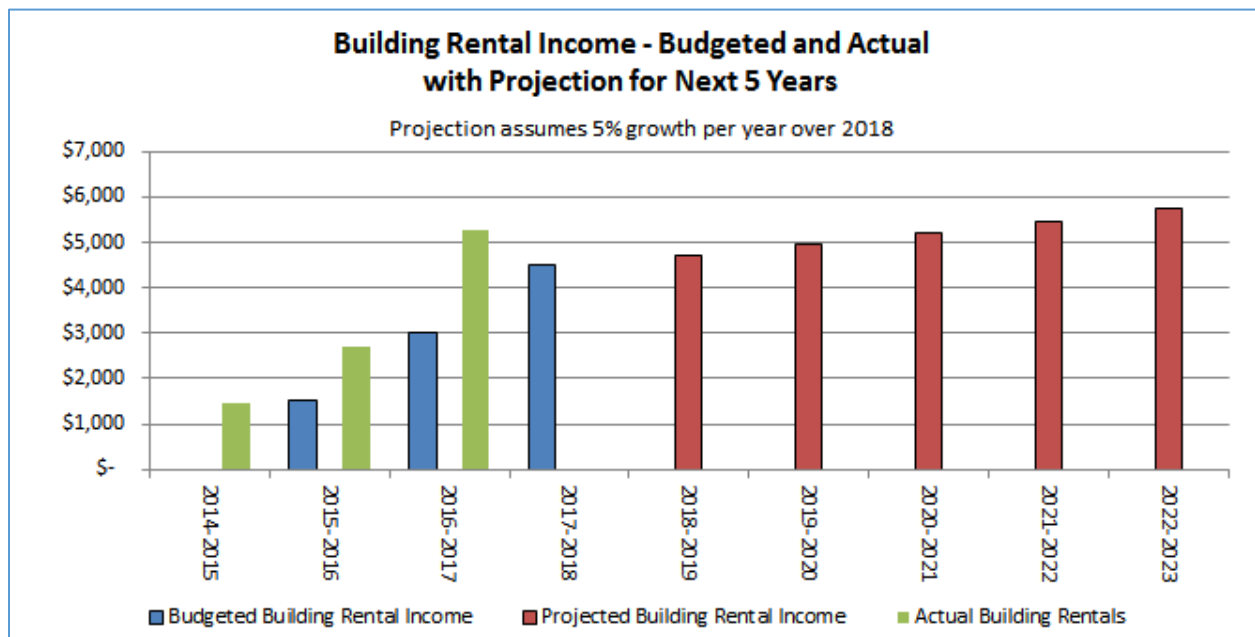


Figure 31 Building Rental Income Actual & Projected

This is what Mallory had to say about rentals on 10/19/17:

*This Fiscal Year, I would say will be our cap for building rentals, unless we change our prices dramatically. It's not a number that will keep getting bigger and bigger and bigger, because there are only so many hours in the day and so much space to be used. I've had to turn renters away this year - our calendar didn't accommodate the groups.*

*And I know it is a revenue stream, but keep in mind that it's not the most efficient one due to the amount of staff time it takes to have renters in our building all the time. Application process with me, logistics of who/when to get in the building, cleaning or set up time for Sterling...*

One option the Team has considered would be to set up a Building Rental Team and/or a volunteer to assist with the building rentals. This would take some of the load off the staff. But this would require a

well-trained team/volunteer, and close coordination with the Administrator and Facilities Manager to make sure the rentals were executed correctly.

One obvious way to get more income from building rentals would be to raise our rates, but we make many special arrangements on rental prices with groups that can't afford to pay much. The idea of increasing our rates should be explored, but there may not be much flexibility there. The net profit of building rentals needs to be examined to make sure we are covering the labor of setup and teardown, with something left over for profit.

#### Building Rental Recommendations:

4. Establish a Building Rental Team or a volunteer position to assist the Administrator and Facilities Manager in planning and executing the arrangements needed for building rentals.
5. Review our rental rates to make sure we are actually making a profit after the labor of setup and teardown is included.

#### Special Events – Music, Guest Speakers, Other Events

In the past the church has sponsored music concert series (Spirituality Through Music), single music concerts, speakers, and drama performances that have been popular. These events draw in both members and guests who may be visiting our church for the first time. This is a valuable presence in the larger community, and a potential source of new members. In addition, if these events are managed correctly they can be a source of income for the church, as well as for the performers.

We have several people in the church who know how to manage music concerts and other performance events, and it is recommended that a Special Event Team should be formed to manage these types of events. These special events should be managed by a volunteer team, rather than relying solely on the church staff. The Administrator will have to be involved as part of the building rental process, but volunteers should do as much of the management of the event as possible, especially the financial and advertising arrangements. Some expertise is required to work with performers, and the Special Event Team would have that expertise.

#### Summary Tables of Projected Income and Expense for Church Years 2019 – 2023

The two tables below summarize the projected income and expense by categories for church years 2019 to 2023. Projected income (table 2) the annual increases in Auction, Building Rentals, Equal Exchange, Matching Grant, Yard Sale, assume a 5% increase year over year from 2017-18 levels. Since Special Events is a new category, projections assume \$1000 in special event income will be gained in 2018-19, with a 5% increase year over year for the next 4 years after that.

Table 2. Summary Table of Projected Incomes by Category for Church Years 2019 - 2023

Year	Pledges	Offerings	Auction	Building Rentals	Equal Exchange	Matching Grant	Yard Sale	Special Events	Annual Totals
<b>2018-2019</b>	\$ 133,761	\$ 14,862	\$ 11,550	\$ 4,725	\$ 630	\$ 10,500	\$ 4,200	\$ 1,000	\$181,228
<b>2019-2020</b>	\$ 138,953	\$ 15,439	\$ 12,128	\$ 4,961	\$ 662	\$ 11,025	\$ 4,410	\$ 1,050	\$188,628
<b>2020-2021</b>	\$ 144,144	\$ 16,016	\$ 12,734	\$ 5,209	\$ 695	\$ 11,576	\$ 4,631	\$ 1,103	\$196,108
<b>2021-2022</b>	\$ 149,335	\$ 16,593	\$ 13,371	\$ 5,470	\$ 729	\$ 12,155	\$ 4,862	\$ 1,158	\$203,673
<b>2022-2023</b>	\$ 154,526	\$ 17,170	\$ 14,039	\$ 5,743	\$ 766	\$ 12,763	\$ 5,105	\$ 1,216	\$211,328

Projected expenses (table 3) assume that non-salary expenses increase at the 2014 – 2018 budget trend. Salary expenses are assumed to increase at 2.5% annually, with a \$10,000 additional salary added in 2018-19 for a Student Intern Minister. The UUA/MDD fees are lower than will actually occur, because the recommended additional members needed to balance the budget are not included in these numbers. The actual fees are set by UUA and MDD each year, so they are not available at this time. In most likelihood, the fees will result in several thousand dollars more than shown here.

Table 3. Summary Table of Projected Expenses by Category for Church Years 2019 - 2023

Year	General	Program	Property	Utilities	UUA / MDD Fees (*see note)	Mortgage	Minister Salary	Staff Salary	Annual Totals
<b>2018-2019</b>	\$12,557	\$14,022	\$24,276	\$10,882	\$8,022	\$0	\$42,889	\$83,277	\$195,925
<b>2019-2020</b>	\$12,658	\$14,135	\$24,472	\$10,970	\$8,087	\$11,000	\$43,961	\$85,359	\$210,642
<b>2020-2021</b>	\$12,759	\$14,248	\$24,668	\$11,058	\$8,152	\$27,000	\$45,060	\$87,493	\$230,438
<b>2021-2022</b>	\$12,861	\$14,361	\$24,864	\$11,146	\$8,216	\$27,000	\$46,187	\$89,680	\$234,315
<b>2022-2023</b>	\$12,962	\$14,474	\$25,060	\$11,234	\$8,281	\$27,000	\$47,342	\$91,923	\$238,276

\*Note: UUA and MD Fees will be higher than the values shown here by several thousand dollars due to any additional pledges and members added to balance budget shortfalls. These fees are set by the UUA and MDD each year, and are not known for future years. Therefore these additional expenses are not included above.

### Capital Improvement Projects

The funding of capital improvement projects is not budgeted by the Finance Team. The Board has established a Capital Fund that is available to receive donations for capital improvement projects. The projects must be approved by the Board based on available funds and priorities. The Property Team maintains a list of potential capital projects with a priority rating of 1 to 4.

Recent examples of successful capital improvement projects are the construction of the patio and garden, insulating and adding stucco to the window panels and columns outside, construction of cabinets in the two kitchens, and replacement of the basement carpet. Future projects on the Property Team list include replacement of the front entry canopy, upgrading the parking lot lighting, and replacement of the parking lot paving. There currently is very little money in the capital improvement fund to cover any of these projects, so a fundraising campaign will be necessary.

Rev. Wendy suggested that we could use internet crowd-funding to raise money for projects like the playground. She also suggested that the Stewardship Team should explore setting up an endowment fund for the church.

There are several members of the congregation who have experience with other churches in selling investment bonds to the congregants as a way to raise money for capital projects. This approach can be used for large expenses, such as mortgages, or smaller projects. There may be some interest in proposing this method of fundraising should a large amount of money be needed in the future. It has been casually suggested by these members that the current mortgage on 536 Ouray could be converted to congregant-held bonds, but to the knowledge of the Team, no serious discussions have been held on the subject. It is beyond the scope of this report to speculate on the advantages or disadvantages of changing the current mortgage arrangements.

#### Capital Improvement Recommendations:

1. Establish a capital project funding system by encouraging gifting through congregant estate planning. Create an endowment fund for the future of the church with a goal of \$500,000.

#### Expense Management

Salaries for the Minister and staff were increased in 2017, primarily by adding hours to the budget so that the Minister and staff can manage the increased activities of our programs and our new building. The financial projections above assume a 2.5% increase annual in salary expenses. There is some sentiment on the Board that hours and rates should not be further increased for the next few years, but inflation should be taken into account to some degree.

Careful management of operating expenses should be practiced by the church leadership and staff. Leadership training should be held for the staff to insure that they know their tasks and are working in an efficient manner. They should be focused on performing their necessary duties, and not be sidetracked into activities that are not necessary to their jobs. The structure of the staff versus volunteer duties should be examined by the Board and the Staff Congregation Relations Team. In particular, the use of volunteers to support staff functions should be encouraged to make staff time as productive as possible.

## Church Staff & Administration

#### Minister and Staff

We are transitioning from a Family type of congregation to a Pastoral type. This will require relying on Rev. Wendy and the staff to be at the center of multiple small networks of congregants. These networks are based on mutual friendships and common interests among subsets of the congregation. We are too big now for everyone to know everyone in the congregation. Rev. Wendy is happy to be a part-time minister so she can also be a mother to her children.

The staff is carrying a large load to keep up with the increased activities going on as our church gets busier. We need to make sure they have the support they need to be efficient and focused on their assigned tasks and not be pulled into tasks that volunteers should be handling.

#### Minister and Staff Recommendations:

1. We will have to trust the Minister and Staff to act in our best interests, while holding them accountable for their actions.
2. The Staff Congregation Relations Team (SCR) needs to become a highly functioning team to oversee staff operations and performance.
3. The Treasurer and the Administrator must work smoothly together to handle the financial operations of the church. The finances are more complex now, and require new systems of management between the Treasurer and the Administrator.
4. Explore ways in which volunteers can assist the staff in their functions. In particular, the church office (office angels?) and the building rentals could possibly use volunteer help. The turnaround after large church events often creates a heavy workload for the Facilities Manager. We should explore ways to assist in these turnarounds by use of volunteer help.

## Minister

Reverend Wendy Jones is our part-time salaried Minister. Prior to being the Minister, she served as our Children's RE Coordinator. In discussions with Rev. Wendy Jones, she stated that she is happy to be a part time minister (she is paid for 25 hours a week, and actually works more like 32 hours), so that she has time to be a mother as well. This seems to serve our church well at this time, given projected budget constraints.

Wendy says she will soon have a completed contract as our Minister, something that has been slow in coming. She and Bill Hilty are working on the details now.

All comments on Rev. Wendy to the Team indicated that the congregants and staff are very happy with her performance as our Minister, and feel that we are lucky to have her.

From our interview with Rev. Wendy:

1. We were a family size church until we moved to Ouray Ave.
2. Wendy can't meet every visitor now that we are having higher attendance.
3. We have added 28 new members since we moved to Ouray Ave.
4. We made 104% of our pledge goal in 2017
5. One of her main concerns: one big pledge makes us vulnerable
6. Wendy is helping Shari to step up her game as Children's RE Coordinator
7. Wendy has mentioned that it would be helpful if we could have an Intern Minister. These could be students from Iliff Theological School in Denver who come to Grand Junction for a year. An intern could take on a specific area of responsibility, such as community outreach. Informal estimates of what we would have to pay such a student intern are about \$10,000 for the year, but no research has been done by the Team to verify this.

## Children's & Youth Religious Education Coordinator

Shari Daly-Miller is our RE coordinator. She is salaried and works 18 hours per week (plus a little for gardening – she takes care of the flowers and plants outside and inside the building). Shari is working to attain her certification as a UUA Director of Religious Education. She has 5 courses to complete, which she estimates will take about 2 years.

Shari is one of the key people who got the church restarted in the 1990's when it was almost fading away. She has played an important role in the life of UUCGV since then. The RE program has been struggling during the last several years, but Shari has found new energy in her role, and the program is definitely showing improvement with a revitalized approach to children's RE. See the RE section below for more about the changes in the RE program.

Shari told the Team that her long term plan is to leave Grand Junction in 2 to 3 years from now, after she has her DRE certification and her youngest child graduates from High School. She wants to seek a DRE position in a larger church in a bigger city. She is also an artist and would like to be in a larger urban area where there would be more market and support for her art work. She has no definite plans to leave at this time, but stated in her interview that she is not necessarily expecting to be our long-term DRE.

### Administrator

Mallory Rice has been serving the church as Administrator part-time (she works 21 hours per week) for six and a half years. Originally she served ten hours a week, and in connection with her 30 hours at First Congregational Church for two years, she was busy! Now with three children (2, 13, and 16), her 25 hours work perfectly. Her sister Miranda also fills in about 5 additional hours a week.

All opinions heard by the Team said that Mallory is doing a good job as the Administrator in a position that is very demanding minute to minute.

Building rentals take a lot of time to coordinate (see the section above on building rentals for Mallory's comments). She feels that building rentals this year have reached the practical limit of how many we can accommodate, due to the needs of the congregation for building use, and the oversight and facilities setup and takedown needed to do that many rentals by the Facilities Manager (Sterling VanWagoner).

Comments about the Administrator to the Team during our interviews:

1. The Church Treasurer expressed to the Team a concern about the way the church finances are being handled in the office. In prior years, we had a professional bookkeeper who assisted the treasurer. The bookkeeper was very cost effective in the past (\$150 per month). Now, Mallory does the bookkeeping and bill paying, and the Treasurer feels that he should do more of the bill paying himself, with the bookkeeper back in the picture. This way Mallory would have more time to do other administrative tasks. There is concern on the part of the Administrator that expenditures need to be made on a timely basis and they can't always wait for the Treasurer to come to the office to sign checks. A debit card has been arranged for the staff to use for routine expenditures, and discussions around this issue have been held. The Team feels that the situation seems to be improving. As Rev. Wendy has pointed out, as we grow to a Pastoral Size church, more staff involvement in church operations is normal.
2. There has been expressed to the Team a concern that we have turned over too much of the running of the church to the paid staff, and that people aren't volunteering to help like they have in the past. For example, Mallory and Wendy have had to do membership and stewardship duties in the past year. As the Membership team is coming together and becoming active now, some of this concern should be alleviated. The stewardship work last year was due to a Board resignation, but the Board should have acted after that resignation to keep the Stewardship position filled.
3. A suggestion of having volunteer "office angels" was made. Mallory has expressed a concern that this actually takes a lot of her time to supervise office volunteers. This idea should be explored further to see if it could help Mallory be more effective without taking too much of her time. Obviously the volunteers would have to be well trained to operate somewhat independently.
4. A Building Rental Team/volunteer is being proposed by the Team to assist the Administrator and Facilities Manager in this time consuming task.
5. The website has pdf files of the monthly newsletter, but these are not up to date.

### Facilities Manager

Sterling VanWagoner, the Facilities Manager, works 15 hours per week. His main duties involve keeping the building clean and handling the setup/takedown for church events, meetings and building rentals. He has to be very flexible to keep ahead of the busy schedule of building use we have. Often he has to come back to the church late at night after an evening meeting to arrange things for a meeting that is happening early the next morning.



Sterling also has carpentry and other skills that he uses to do minor construction and repair projects for the church. He constructed and installed the very nice name tag holders in the foyer.

All comments about Sterling's performance have been that he does a great job and is a valuable member of the church staff. We are lucky to have him with his experience and work ethic.

#### Music Director

Marcia Kuhlman is the part-time (8 hours per week salaried) Music Director. She has brought a high level of professionalism to the job, and everyone has good comments about the music program she has established.

Some concern has been expressed that it is going to be a big loss that Marcia will be working mostly in Carbondale and not having as many hours available for our church. But members of the choir say that the music program is still being well supported by Marcia. Finding and keeping good Music Directors has been a challenge for years, probably due to our ability to only pay a very limited part-time salary for a Music Director.

A comment was made to the Team that our music concerts have dwindled in the past year. The Team would like to have the music concert program restarted (see the Special Events section above). If we begin our music concerts again, we need to make sure they are well advertised in the community and other churches.

#### Church Member Database

It has been brought to the attention of the Team that there is a need for a single database of information for the church, that would contain different directories and support several kinds of queries.

Comments to the Team in our interviews:

1. We need a robust source of information, a place where we can store information.
2. Who will have access to different parts of the data? Each type of user should have selective, controlled access.
3. Can the database hold archived historical documents like old budgets, spreadsheets, auction records, sermons, photos, etc. that have information that will not be re-entered into the database as data?
4. Mallory has engaged a church member who has experience with Access to work on developing a database that would assist the Administrator by storing member data. This is needed for church mailings, directories, etc. The skills and interests forms that members fill out is being entered in this database.
5. Is there pre-existing software available that could fit our needs? Jan and Richard Hyland have volunteered to research whether commercially developed church databases that would serve our needs are available at a reasonable cost.

Database Recommendations:

1. Develop a robust database where many types of information are stored and retrieved by various groups and individuals who have responsibility for the administration of church business, operations, and programs. This database should have the following:
  - a. All church information including:
    - i. Names, addresses, telephone numbers, skills, and interests of members and friends



- ii. Board and Teams information including mission statement and meeting minutes
    - iii. Rental information
    - iv. Current and historic computer files and documents archived
  - b. Rights assigned to each person with access to the database.
    - i. Administrator (s)
    - ii. Minister
    - iii. Board and Team members
    - iv. Members and Friends
  - c. Ability to create reports including a church directory
  - d. Ability to handle queries.
2. An investigation needs to be done whether there exists database software to do this either within UUA or commercially, or whether we need to create our own system.

## Church Operations Teams

### Church Organization & Structure

On a basic level, we need to view the operation of the church as a business that delivers spiritual services to our members. If a business operates in a haphazard way, not managing expenses and income, its survival is in doubt. This is also true for our church.

However, the church is much more than just a business, as it ministers to the spiritual and personal needs of the congregation, as well as the community at large. If the church is seen as just a business, it will fail in its mission.

The Team discussed whether the organizational structure of the church was appropriate for our mission. While there are some areas where the organizational structure has been weak, such as the TLC, the Team feels that these problems are being slowly addressed and resolved. The Team believes that a good organization chart, combined with training for the Teams, TLC, the Board of Trustees, and for the congregation in general, will help to insure that everyone has a clearer picture of how the various parts of the church function, how those parts interact, and the roles of the individual volunteers.

To undertake another reorganization of the church structure, similar to that which happened before we moved to the Ouray building, would be very time consuming, distracting, and not the best use of the attention and time of the church leadership. The last reorganization took the better part of 2 years to accomplish, and we are still making adjustments to that plan. Should the Board decide to go through a reorganization again, the Team recommends that a consultant who is versed in church structure and organization should be retained to help guide and streamline the process.

The Team does not see a church reorganization as necessary at the present time. Training for the Teams, TLC, the Board of Trustees, and for the congregation is recommended, as well as the development of a church organization chart.

### Board of Trustees (Board)

The Board consists of the President, Past President, Vice President, Treasurer, Stewardship Trustee, and two Members-at-Large. These positions serve for 1 year, and are term limited to two consecutive terms. At least one year must elapse before a Board member can be re-elected to the same position on the board.

The church Administrator functions as the Board Secretary, although in the past there was an elected Secretary to the Board.

Comments on the Board of Trustees to the Team in our interviews:

1. How does the Board insure that they are in touch with the needs and pulse of the church? Good communications from the TLC, the ad-hoc teams, and the congregation are essential to the Board doing a good job.
2. One comment to the Team is that we never see the Board minutes. (They are posted on the church website, but are currently several months behind). We used to have a summary of Board minutes in the newsletter, and this should be reinstated.
3. There is no volunteer Board secretary. Mallory writes the agenda for the Board, and serves as the Board secretary. Is this the best use of the Administrator's time? IS THIS PART OF HER DUTIES? (JH)
4. We used to have a youth member of the Board, but haven't had one in recent years. The Team feels that this is something that should be reinstated if possible. It is another way to insure that the youth are recognized and integrated into the church.
5. When a resignation occurred last year in the Stewardship and Auction Board position, why was that position not filled? This led to the pledge campaign being run by the Minister and the Administrator, which is not part of their job description. The Bylaws state that the Board will "fill vacancies between Annual Meetings as recommended by the Leadership Development Team".

Board of Trustee Recommendations:

1. Publish a summary of the minutes of the Board meetings in the newsletter and on the website the week following the meeting.
2. Revisit the decision not to have a Board Secretary. The Board Secretary, rather than the Administrator, would distribute the agenda and record and distribute the meeting notes following the meeting. This would eliminate the labor cost of having the Administrator function as Board Secretary.
3. Consider having a youth member as a Board member again. This would create a strong tie to the RE program, as well as developing future leaders.
4. When positions on the Board become vacant during a term, the Board must fill those positions in a timely fashion, especially when they occur in an important position such as Stewardship.
5. Add a provision to the ByLaws which establishes a method to replace a TLC member who resigns from the TLC during the church year.
6. Establish a ByLaws provision for the LDT to serve as the liaison between the TLC and the Board.
7. Formalize the mission, scope, and responsibilities of the SCR in the ByLaws.

#### Staff Congregation Relations Team (SCR)

The SCR has been created to provide oversight of the church staff, which insulates the Minister from having to perform the conflicting roles of ministering to a staff member, while simultaneously supervising that staff member.

The Committee on Ministry handles relations with the minister, while the SCR handles relationships with the staff. The SCR is responsible for determining church staffing and conducting staff performance evaluations. The SCR is reviewing the staff job descriptions and will interview the staff members about their jobs.

The Personnel Policy Manual is being reviewed by SCR. It was written by Mallory, but needs some additions.

Some comments to the Team about the SCR:

1. There is an overlap of supervisory responsibility between the Minister and the SCR. Wendy worries about being the minister and the supervisor for someone at the same time.
2. A clear definition of staff duties and tasks is needed.
3. When staff members find themselves doing jobs that should be handled by volunteers, they should alert the SCR. The SCR team should then contact the Volunteer Team to find a suitable volunteer.

SCR Recommendations:

1. Formalize the mission, scope and responsibilities of the SRC in UUCGV By-laws and Policies.
2. Revise and complete the Personnel Policy Manual, and review the job descriptions for staff.
3. Set up a performance evaluation procedure for the staff.
4. Handle job performance issues arising with individual staff members, between staff members, between staff members and the Minister, and between staff and the congregation. It is difficult for the Minister to be the minister for a staff member and also be that person's job supervisor who judges the performance of the staff member.

#### Team Leadership Circle (TLC)

The TLC is charged with administering and managing the Programs of the church and its Calendar. Programs are defined as those Calendar-based activities which put forward the ideals of the Mission, Vision, and Principles which are the guide posts of UUCGV.

The old Council structure (circa 2003) was made up of all the committee chairpersons, with the Vice-President of the Board as the permanent Council Moderator and liaison back to the Board. For some reason this structure fell out of favor and was abandoned. At this point, a very large number of teams were created, possibly more than there were volunteers to staff.

So when the Board established the TLC several years ago, the TLC Team was told that the Board wanted to create a leadership for the Program Areas that grew organically from the needs of the congregation, so a number of the historic teams were disbanded. That idea didn't work out as intended because it took the TLC several years until they realized how important the traditional teams were to the operation of the church. One weakness of the original design of the TLC was that the TLC didn't have to be composed of the team leaders. The TLC was only supposed to coordinate what the teams were doing. So there was no inherent buy-in from the TLC members in the operation of the teams.

This has been partially remedied by a recent change to the Bylaws. Now the Worship, Membership, RE, and Celebrations teams all "are to be led by a designated member of the TLC Leadership".

Originally the Leadership Development Team (LDT) was to provide a chairperson for the TLC meetings each month on a rotating basis. This requirement has since been dropped, so now there is no permanent person to chair the TLC meetings. Rather, the chair person is assigned for each meeting. This leads to inefficiency in the way the meetings are chaired. An agenda is usually prepared, but is not necessarily available to the TLC members prior to the meeting. Time management of discussions at the meetings is often a problem, and it is sometimes difficult to complete the agenda in the time allotted.

Comments on the TLC to the Team in our interviews:

1. The TLC is still evolving in its role of coordinating the Programs of the church, and more work is needed to insure that it is functioning well.
2. The chaotic nature of the TLC may be driving away good volunteers who don't want to put up with the meetings.
3. The members of the TLC don't always have understanding of the activities of the other teams for coordination purposes.
4. The duties of the teams are not always clearly defined, so confusion exists between teams as to who is in charge of a particular task. A clear definition of TLC member responsibilities is needed.
5. The TLC has difficulty deciding on program requests by outside groups wanting UUCGV sponsorship. The request process is not clear. There are problems with deciding on rental fees, donation of space, legal liability, and public relations.

TLC Recommendations:

1. Follow a prepared agenda to insure that an orderly discussion is held in a timely fashion.
2. Establish some method for having continuity in the meetings by creating the position of meeting chairperson or facilitator. The job should be given to a member of the TLC on an annual (or other) basis who can conduct an efficient meeting.
3. Develop a clearly written definition of each TLC member's duties and responsibilities.
4. Define in writing the duties of each team, and the interactions between the teams.
5. Develop a clear procedure for responding to requests from outside groups seeking UUCGV sponsorship.
6. Publish a summary of the minutes of the TLC meetings in the newsletter and on the website.

#### Committee on Ministry (COM)

The Committee on Ministry has these assigned duties in the Bylaws:

1. Facilitate the Beloved Community process to promote our Covenant of Right Relations.
2. Nurture the needs of the minister and maintain a channel of communication between the minister and the congregation
3. Recommend a salary and benefit package for the minister to the Finance Team
4. Create a safe place for members to resolve conflicts

There are no recommendations for the COM.

#### Leadership Development Team (LDT) and Volunteer Activities

How do we recruit new members into volunteer positions that match their talents and provide enjoyment to them? The Leadership Development Team is charged in the ByLaws with finding and recommending candidates for elected positions on the Board and the TLC, as well as "soliciting qualified candidates for all team leaders". They are also charged with assisting in recruiting non-elected team members and volunteers for the various teams, and making recommendations to the Board for training.

In the past several years there has not been formal leadership training at various levels of the church. The Team feels strongly that the smooth functioning of the church is dependent on a well-trained congregation, from the bottom to the top. In the past the MDD offered the Russell Lockwood training conference to our congregation, and we always sent several members to this very intense and valuable training. Now for whatever reason the Russell Lockwood Conference has been discontinued by the PWR. We need to replace this with some other resource for leadership training.

In past years, the LDT was active in recruiting non-elected volunteers for the various teams, but this has not been functioning in the past year or more. This breakdown was very concerning to the Team due to the very important function that volunteers play in integrating new and existing members into the church community. The Team believes that when members become active as volunteers, they develop a deeper commitment to the church in both personal ties and financial commitment.

The Team discussed at length how to strengthen the recruiting and training of volunteers to serve in the many volunteer positions around the church. We were frustrated that the LDT has not functioned well in recruiting volunteers, much less in training them. Also, there is a lack of job descriptions for volunteers, which deters new volunteers from committing to a position about which they know very little. The LDT should be responsible for creating and maintaining these job descriptions.

One option discussed was to create a separate Volunteer Coordination Team which would focus on non-elected volunteer positions. The LDT would then be focused only on recruiting candidates for elected volunteer positions. But this would create another team for which members would have to be found. In the end, the Team decided that the LDT should be revitalized, with new membership added where needed, and possibly expanding the LDT by one or more additional members. This would allow the LDT to return to their historic role in recruiting volunteers for teams, and add the responsibility for volunteer job descriptions and volunteer training.

Another area of concern on the part of the Team is the lack of liaison between the TLC and the Board. When the LDT was first constituted 3 or 4 years ago, one of their duties was to facilitate the TLC meetings, and report TLC activities back to the Board. Several years ago it was decided that the LDT would no longer facilitate the TLC meetings, which had the consequence that there is no longer a liaison link between the TLC and the Board. The Team feels that the LDT should be required in the ByLaws to attend all TLC meetings, not as the facilitator for the meeting, but to take notes on TLC activities and decisions as the liaison between TLC and the Board.

Finally, a formal Organization Chart needs to be created and maintained for the church, showing all the various elected bodies and teams, and the relationship between those groups. The LDT is the logical team to create the Organization Chart and keep it up to date.

The LDT is comprised of Dave Miller, Bill Hilty, and Duane Carr. The team is in transition with Dave Miller moving next spring, and Duane being new. Duane has been visiting lots of team meetings to see what their needs are. The Board should consider expanding the LDT by one or more members to insure that all the duties of this important team are fulfilled.

#### LDT Recommendations:

1. The LDT should resume their role in assisting the teams in identifying and recruiting non-elected volunteers for positions on teams.
2. The LDT will define in writing the jobs for all volunteers, including their relationship with the duties of other teams. The LDT should create job descriptions for all volunteer positions, both elected and non-elected. These will be provided to all volunteers when they are recruited and trained.
3. The LDT should arrange for formal leadership development for all levels of the church – the Board, Staff, Teams and Team leaders, volunteers, and the congregation in general. The LDT needs to find a replacement for the loss of the Russell Lockwood training where we previously sent our leaders for training.

4. A representative from the LDT should be required in the ByLaws to attend all TLC and Board meetings, not as the facilitator for the TLC meeting, but to take notes on TLC activities and decisions and serve as the liaison between TLC and the Board.
5. The LDT should be responsible for creating and maintaining a church-wide organization chart.
6. The LDT membership should be revitalized and possibly expanded by one or more members to insure their duties can be fulfilled.

Comments to the Team about Volunteers:

1. Tim talked about how tasks that have been handled in the past by volunteers are now being done by staff. An example is the stewardship campaign which had a lot involvement by Mallory and Wendy. Another example is the provision of food for coffee hour on Sundays. Now the staff is purchasing food for the coffee hours. Tim feels that this is a known trend in non-profit organizations where the staff grows and grows, and becomes the justification for the existence of the organization. He feels we need to get back to more volunteer involvement. This gets people linked into the people and activities of the church and gives them buy-in. Otherwise they are just consumers of our services. Serving as a volunteer is one of the most satisfying things about being involved in UUCGV.

Comments to the Team about Leadership Development:

Penny Youngren is a recent addition to our congregation who has done leadership training professionally for UU churches in Virginia. She was interviewed by the Team about leadership development. The following comments are from the Team's interview with Penny.

1. The Leadership Development team is charged in the Bylaws with "Identifying areas of skills development, making recommendations for trainings, and making leadership aware of learning opportunities provided by the UUA, PWR, MDD, and other resources." Recently the LDT has not been handling its responsibility to provide leadership development training.
2. Leadership training should be provided for the Board, the staff, the Team Leaders, plus anybody in the congregation who is interested.
3. The modern church does not have enough "housewives" to volunteer, so the church has to depend on more paid staff. All the women are out working now, unlike in the old days.
4. We need to know what everyone's role is in the church. We never see the Board minutes, there is no Board secretary anymore.
5. Leadership development is a key component of keeping people engaged. People join a church to change their lives.
6. We need to teach people how to be members. They may not have prior experience as a church member. Our job as a church is to build community.
7. People pay for what they value. What do young people value from a church today?
8. Tim mentioned that he does not plan to continue as Treasurer after this year. Penny Youngren suggested he write job description and put it in the newsletter to help recruit his replacement in time for him to provide training for that person.
9. The Team asked Penny if she would be available to provide leadership training for our church. Her answer was that she could do it if she had help. She isn't up to doing it by herself anymore.
10. Penny closed by saying "Church gives people chances to have their lives changed. Leadership development guides this process."

## Safety Team

The recent church attack in Texas has reminded the Team that the church should have a proactive plan implemented for safety and security. The concept of safety includes how to respond to an attacker, how to respond to someone creating a disturbance during the service, how to respond to a fire, how to respond to a heart attack, and other such emergencies. At present it is not clear whether the church has planning or training for handling these situations. Several members of the congregation (Rev. Wendy, Robert McDonald, others?) attended a training session last year about active shooter threats, but has this information been passed on to the congregation? The church has a Safety Team, but it is not clear whether this team is currently active.

The Team discussed the overall issue of safety and security, and has some recommendations.

In the past there were several ideas presented to the Board by the previous safety team. The Team discussed these ideas in our interview with Bill Hilty. They are:

1. The Safety Team should become active again to assess these proposals. If the Safety Team needs new members, they should be added.
2. Construct a door at the bottom of the back stairs to enable a lockdown of the basement should this be necessary during an attack. The Property Team has discussed a design for such a door, but funding was never approved to do this construction. The door would have a break bar to allow persons to exit the building from the basement up the stairs, but could be locked to prevent entry from the stairwell side into the basement. The lock should be easily and quickly applied during an emergency, and not require an Allen wrench like the upstairs doors use to be locked and unlocked. Finding and using an Allen wrench would be too cumbersome in the few seconds available to respond to an emergency.
3. Create a team of trained Safety Ushers, at least one of whom would be scheduled to be present at every Sunday service, as well as major congregational social events (auction, Thanksgiving, etc.). This team would unobtrusively monitor the foyer and the people entering for the service, and would be vigilant during and after the service for unusual activities and disturbances. Should a disturbance occur, this team would have a predetermined plan of action for how to respond. At one time there was an understanding that spontaneously singing the hymn "Spirit of Life" would be a signal for action. The question of whether guns should be part of the Safety Team response capabilities needs to be discussed. The proposal to create a Safety Usher Team has not been acted on.
4. Install a system of security cameras to monitor the building. This could be as simple or elaborate as desired. A single D-Link brand Wi-Fi connected camera costs under \$100, and a matching recorder as little as \$200, including a USB hard drive to store the data. Such a recorder can continuously store the video from 4 cameras simultaneously. This proposal was never acted on. The property team has the expertise to install these security cameras. The Safety Ushers would be able to monitor this camera system when on duty (it can be done from smart phones), and the office would be able to monitor this system as well from the monitor computer, which needs to be located in the church office.
5. Purchase an automatic defibrillator for the church. These units are computer controlled, and only require that someone apply paddles to a person's chest. The computer determines whether a



defibrillation is required. Bill Hilty, an emergency room doctor, told the Team that a defibrillator is something that definitely could save a life, and that we should have one in the building. The cost for a Phillips Heartstart unit is \$1199 on Amazon, and includes a complete bundle of equipment, wall cabinet, instructions, signs, etc. for installation.

6. We do not have a fire response plan, particularly for the children and youth in the basement. There needs to be a fire response plan developed, and a fire drill should be conducted at least once a year as part of the Sunday service.
7. The Property Team currently is considering a plan to upgrade the lighting in the parking lot. The Property Team feels that the current level of parking lot lighting is not sufficient at night, especially toward the west side of the front parking lot. Also, there is insufficient lighting on the rear parking lot. An upgrade to the parking lot lighting is being planned in 2 phases. The first phase would install brighter LED lights on west and north sides of the building to better light the front and rear parking areas, replace the back door light with LED lighting, and add an LED light near the shed to discourage homeless people from camping there. Hopefully this project can proceed this church year.

The second phase, if needed, would install solar LED lights on poles on the west side of the front parking lot. This phase is expensive, so the Property Team will assess whether this is needed after phase 1 is completed.

#### Safety Team Recommendations:

1. The existing Safety Team should become active again and new members added if necessary.
2. The Property Team should construct a door at the bottom of the back stairs to enable a lockdown of the basement should this be necessary during an attack
3. The Board should create a team of trained Safety Ushers, at least one of whom would be scheduled to be present at every Sunday service, as well as major congregational social events (auction, Thanksgiving, etc.).
4. The Property Team should develop a proposal for a minimum security camera system which would allow for real time monitoring as well as continuous recording capabilities.
5. The Board and the Safety Team should solicit capital project donations for purchasing a defibrillator for the church.
6. The Safety Team should develop a fire response plan for the church, and a fire drill conducted at least once a year at a Sunday service for the entire building.
7. The Property Team should proceed with phase 1 of the parking lot lighting upgrade project when capital funds become available.

#### Advertising & Marketing

Advertising and marketing of the church is important for both building the membership of the church, and as part of our community outreach to the Grand Valley.

#### Recommendations:

1. At one time we had a team that was responsible for advertising, publicity, and marketing of the church. There been no such team in recent years. We need to revitalize this function to make sure the church is known to the outside community. Methods of advertising and publicity in the



past have focused on the newspaper, but this may not be the most cost effective way to get our message out.

2. The use of social media and our web site are now being used by the Administrator to advertise the church to the wider community. A Media Outreach Team, which would include the Administrator, should be created to investigate new and better ways to advertise who we are and what programs we offer and manage our media outreach.

### Property Team

The Property Team is responsible for maintenance of the building and grounds, as well as planning and overseeing capital projects such as major upgrades and remodeling of the building. The Property Team also coordinates building and grounds maintenance with the Groundskeeper (Jay Martinez) and the Facilities Manager (Sterling VanWagoner).

In the recent past the Property Team has completed the building remodeling, repaired the parking lot paving, replaced the basement carpeting, upgraded the sound and video system, and is currently working on upgrading the lighting for the parking lot, designing a playground, and replacing the front entrance canopy.

Recommendations:

3. The Property Team is working on plans for a playground in the rear of the church, as well as replacement of the front entry canopy. Input from the congregation will be needed and welcome to insure that these projects meet the needs of the church.
4. Financial support of capital improvement projects will be essential to achieving these ambitious plans for the church building and property. Capital funds for current projects either do not exist or are quite limited, so additional fundraising will be necessary to carry out the playground and entry canopy projects.

### Building Rentals

Building rentals are both an important outreach activity to the outside community, and a revenue source for the church. The Administrator says that we are probably at the maximum level of building rentals this year, considering the administrative time it takes, and the capacity of our schedule. One way to ease the administrative and facilities management burden would be to establish a volunteer Building Rental Team to assist in this important process.

Building Rental Recommendations:

1. Establish a Building Rental Team or a volunteer position to assist the Administrator and Facilities Manager in planning and executing the arrangements needed for building rentals.
2. Review our rental rates to make sure we are actually making a profit after the labor of setup and teardown is included.
3. Develop a detailed Rental Setup Form for use by the Facility Manager. This form would list exactly what setup is required for each event, including a sketch of the meeting room layout, as well as the detailed audio & video requirements for the meeting.

### MDD, PWR, and UUA

Our church is part of a pyramid of higher UU organizations: We are in the Mountain Desert District (MDD), which is part of the Pacific Western Region (PWR), which is part of the Unitarian Universalist Association (UUA). Our involvement with the PWR is relative new. In the past we worked only with

MDD, and the District Director visited us at least once a year. In recent years we seem to have no personal relationship with the MDD or now with the PWR. Now that everything is centered in California rather than Denver, training and conferences are further away and hence more expensive for church leaders and members to attend. We need to find a way to bring the resources of the UUA, PWR, and MDD back to Grand Junction. Is there someone in the PWR, who can provide the resources we enjoyed in the MDD? The churches in the MDD tend to be smaller and could use support from PWR.

We also used to participate in training through the MDD, but the PWR has ended the Russell – Lockwood Leadership Conference, which was once our best place to train our leaders.

Recommendations:

1. Contact PWR to find out what resources are available to us and how to request them.
2. Request information from MDD, PWR, and UUA on resources for leadership training for volunteers which could be held at our church.
3. Replace the Russell-Lockwood Training with another resource for our church leadership.

## Church Program Areas

### Sunday Services and Attendance

According to Rev. Wendy, a number of changes are being implemented for the Sunday services. One of the goals is to better integrate the children into the start of the service. An opening song "Enter, Rejoice, and Come In" will be started at 10:25 to bring people in from the foyer. The children will be in the sanctuary from the start of the service through the chalice lighting. The "You Are Welcome Here" ceremony will be interactive, with the congregation saying "You Are Welcome Here" each time to different people near them. Either Miranda or Mallory will be paid to be at the church on Sunday morning to handle administrative duties.

Attendance at Sunday services has been increasing since we moved to our new building (see figures 2 through 6 above). While most services were lower in attendance, there were 3 services last year that counted over 100 in attendance. Since we are allowed 92 on the main sanctuary floor, 32 in the chancel, and 13 in the kitchen area (seated), we are beginning to reach our limit. At present the Worship team does not differentiate between these three seating areas. The Team requests that the Worship Team start counting and reporting these three areas separately for future planning purposes.

Figure 28 above showed that the projected attendance will most likely exceed our sanctuary capacity starting in 2020-21, if the additional members needed to balance the budget are added to the rolls. The Board asked the Team to research how we could accommodate a second service. See Worship Team on pages 14 - 17:

Questions that were asked of the Team on Sunday Services:

1. Has the average age of the congregation gotten older? Answer: The Team does not have age data to research this question. Is this why RE attendance is dropping? Answer: It could be part of the problem, but not necessarily all of it.
2. Would it save money to effectively shut down worship during the summer? Answer: Probably not, as we would lose a lot of momentum and possibly members.

3. What does it cost for a Sunday service? Answer: Good question that the Team didn't attempt to answer.

### Worship Team

Laurel Carpenter is the new head of the Worship Team, with members Laurel, Joanie Leinbach, and Steve Watson.

#### Worship Team Recommendations:

1. The Team requests that Worship Team start counting and reporting the attendance on the main floor of the sanctuary separately from those seated on the chancel, and if the kitchen area is being used for seating. This is to be sure we are complying with the fire limits of 92 main floor persons, 32 chancel persons, and 13 kitchen persons (seated). Currently all attendees are lumped together, so we cannot tell if we are routinely exceeding our limits or not.
2. In the past the Worship team has not wanted to be responsible for operating the sound and video equipment in the sanctuary. If the Worship team would take responsibility for scheduling a worship associate to be in charge of the basic operation of this system, it would provide more assurance that everything was working and covered during every service. There is an informal group of people who know how to run the equipment, but there is no guarantee that they will be at church each Sunday. These worship associates would receive training for how to do the basic requirements of the Sunday service.
3. The Worship Team should start planning now for how to provide two worship services in future years. Once the membership grows to the point where we exceed the facility's limits, there are a number of ways in which two worship services could be provided at UUCGV. If the financial recommendations are achieved for growing the church membership, the need for two services should occur sometime within the next 2 to 3 years.

### Religious Education Program (RE)

UUCGV provides religious programs for 3 age groups: children's, youth, and adult. The Team views the RE programs as vital to building a successful church. Without RE, we will become like the First Congregational Church, which has a dwindling number of seniors as members. Children's and youth RE meets the desire of young parents to provide their kids with an alternative to the fundamentalist offerings which are most prevalent in the Grand Valley. These young families are important to keep the congregation revitalized and balanced as to age groups.

We have had successful RE programs for many years, yet success is not guaranteed. It takes hard work and a commitment on the part of everyone: the Minister, the RE Coordinator, the Administrator, the Board of Trustees, the RE Team, and the congregation members who volunteer to help with the RE programs, the congregation, and the parents of the children.

#### Children's & Youth RE

Attendance at Children's and Youth RE programs have struggled in the past. (see figures 3, 4 & 6). While we were at Grand Ave.(2009-11), there was not sufficient classroom space to accommodate the programs. For a while, RE was held Sunday mornings, before church due to limited capacity for RE classes at that building. Attendance and registration numbers declined while we were located at the FCC church (2012-13), probably due to the necessity of holding services on Sunday afternoon. That was not a good time for school children and their parents who were preparing for the coming school week on Monday. When we

moved to the new building on Ouray Ave., Children's and Youth RE attendance improved immediately for 2014-15. Then the numbers began declining again for the next two years.

Now there is an uptick again in attendance for the current church year (2017-18). Figure 7 shows the combined children's and youth attendance every Sunday for the past year. Attendance varies seasonally, with low attendance around Christmas and early summer. So how do we stabilize Children's and RE registration and attendance?

To revitalize the programs, we are changing the Children's and Youth RE paradigm this fall to move away from the 1950's Sunday School model, which the kids don't like. Mothers don't want to teach RE, but want instead a respite from the kids to be able to attend church. So the program is moving to a Project model, where each month, one UU principle will be taught through the creation of a multi-age project. The leadership of the project will be by volunteers who commit to a 5 or 6 week time frame. The projects will utilize technology which the kids are interested in. The first project will be a geo-tracking project that the kids will create and lead the adults on at the end. Mallory is the project leader. Other ideas are to use Facebook and YouTube in the projects.

Initially it was thought that we need to hire a UU certified Director of Religious Education. But it has been decided instead to strengthen the skills and support of the existing RE Coordinator, Shari Daly-Miller. Rev. Wendy has taken a role to help make this happen. Shari reports that she is working to complete the training required for UU DRE certification, which she expects to require about 2 years. In addition, a new RE Team has been formed, consisting of Shari, Rev. Wendy, Mallory, Maya Corbin, Kathleen Hedlund, and Robert McDonald, with floating project leaders and a team for each month's project.

Attendance and registration for Children's and Youth RE has increased this past summer and fall, and the reception of the new approach is positive. The high school age group is small at present, but there is a good 8<sup>th</sup> grade group that hopefully will remain to become high school participants. While continued and sustained effort is still needed, the RE program appears to be on track to improve.

Leadership for the Youth program is a challenge. For the past 2 years, a dedicated group of the same 4 volunteers has led the Youth program. This year, different volunteers are being sought monthly, which leads to a lack of continuity. Shari states that the ideal solution for the Youth program would be to hire a part time youth leader for 5 hours a week to just focus on the youth, while Shari focuses on the children. Presently there is no budget to do this.

In the Team's interview with Shari, she stated that she expects to move from Grand Junction in the next 2 to 3 years, after her youngest son graduates from high school, and after she completes her DRE certification. She said that we should not consider her as the long term DRE for the church. So a transition should be expected and planned for a new person to head the RE program in 2 to 3 years.

Children's RE Recommendations:

1. The entire RE program – Children, Youth, and Adult – is of vital importance to the future of this congregation. There need to be performance measurements put in place by the Board that will determine if we are making progress toward our goal of a highly successful RE program.
2. Is our current project based approach supported by the UUA? Are we taking advantage of UUA curricula and support?
3. The Youth RE program is not relying on the same set of volunteers every Sunday this year as was the practice for the previous 2 years. The RE team and the RE Coordinator need to insure that the

Youth program does not fall behind because of inadequate planning and support for the project activities for that age group. The Youth project activities are intended to be tightly integrated into the projects that the Children are working on.

4. Shari Daly-Miller has indicated to the Team that she does not plan to remain as the UUCGV RE Coordinator for longer than 2 to 3 more years. Planning needs to begin as to how we will want to replace Shari when she plans to leave Grand Junction. The next RE staff person should be a UUA certified DRE with a track record of performance.

#### *Adult RE*

Rev. Wendy currently leads the Adult RE program. The cornerstone of that program is the Build Your Own Theology series. This is held once a week in the Fall and Spring, with typical participation of 12 adults. Other volunteers may teach an Adult RE course from time to time to give Rev. Wendy a break. Informal Adult RE sessions include the Who Are UU? Groups after church once a month, and the Continue the Conversation groups that meet after church each Sunday. The Continue the Conversation idea is new, and attendance is quite variable. The Black Canyon Discussion Group still meets in Delta. Currently there is no Book Discussion Group, but this has been a mainstay in past years.

#### Adult RE Recommendations:

1. Provide more Adult RE programs. The Book Discussion Group could be started again, along with other types of groups to meet the interest of Adult members. Of course, this is highly dependent on volunteers who want to be in charge of these series.
2. Does the current RE Team do any work on Adult RE? If not, create an Adult RE team and/or volunteer position to work with Rev. Wendy to expand the Adult program.

#### Some RE observations and comments to the Team:

1. At present, Religious Education teachers cannot attend church services since the children's RE classes are concurrent. Can this be changed? Sunday morning RE classes for adults were mentioned as a possibility if we had RE at 9:30.
2. Chris Coolidge gave a presentation regarding religious education (RE) from her perspective as a member of both UUCGV and FCC. Since FCC does not currently have much if any RE activity, I thought it would be helpful to hear her perspective. FCC is struggling with how to revive their RE program, which was very strong in the 50's. There is still an FCC member who grew up in the church and participated in the RE programs as children. Chris also gave examples of RE programs from Mormon churches and the UU churches in Los Alamos and Littleton Colorado. All of these churches have successful RE programs.
3. Chris also suggested that we need to have the whole family involved in the RE process to insure that kids will want to be part of our RE program. To get teens interested we need to have programs that attract their friends. Kids want to have fun with their friends at what they are doing. We concluded that our RE program may not be compelling in attracting kids. The Mormon church has something going every Wed night for kids at the church. The most successful period of RE at UUCGV was when John & Julie Bradley ran the program. Both of them were teachers who were very dynamic, and who loved working with kids. The issue of kids only being interested in their electronic devices made us wonder if somehow that could be built into the RE program somehow?
4. The Team also discussed the question of including kids in church services or not. There were mixed feelings about that. Some thought that kids were a distraction to the parents who were

trying to appreciate the service. John Mayo said in the old days at his Methodist Church, RE (Sunday School) started at 9:30 on Sunday morning, so the kids were in their classes, and the adults were in their own adult classes. Then the whole family went to church together at 11, except for babies who were in the nursery. It isn't clear why the UU's abandoned this model – perhaps we want to streamline the time we are in church on Sunday, and 3 hours is too much? Going back to an early RE model might make RE stronger since the whole family could participate at the same time.

5. The relationship between membership and RE was discussed. We need to move visitors into friends, and friends into members. We can get the kids into RE through their young parents. We recognize the continuing weakness of member recruiting and retention at our church.
6. Mallory Rice sees an adult volunteering for a whole church year as leading to burnout. We have passed the day when stay-at-home Moms had time and energy for this type of commitment. Jan Hyland asked if a parent would be interested in a project. Mallory said that anyone can help, and named Mike Youngren, a creator of documentaries, and Robintix Perryman in music as two possible assistants for this year.
7. Gary Poush asked if there might be another time during the week than on Sunday morning for the RE program. Mallory said thought is being given to re-implementing the Wednesday night potluck model which includes a variety of class options for all ages.
8. The Team discussed various models of teaching, from the straight teaching model (grownup talks, kids listen) through the project-based model, including a combination of each of these two. This had been implemented previously, Tim O'Brien said -- using a curriculum from Boston - and was well received by the children.
9. John Mayo asked Peg Oswald about the time at Grand Avenue (about 2012?) when we didn't have enough RE classrooms, so RE met early from 9:30 to 10:30. This is of interest in case we ever need to have 2 Sunday services. Peg said that she liked being able to attend the worship service, but there is the question of what do you provide for the kids during the service? The solution was to have crafts available for them. Julie Bradley was the RE director at the time, and everyone remembers her as being the best RE director we have had. She was a professional teacher, as was her husband John. Some people during this time period only attended RE and not church. Peg said she was glad to go back to concurrent RE and worship, but didn't state why.

### Membership Team

UUCGV needs effective membership recruiting and retention by asking “what needs can we meet for visitors so that they will become invested members?” The Membership Team has been practically non-existent since we moved to the Ouray Ave. building due to the structural problems created when setting up the TLC (see TLC section above). The Team feels that having an effective Membership Team to recruit new members is absolutely essential to maintaining the spiritual and financial health of the church. The Team is encourage that the Membership Team has been re-formed and seems energized to take on this task.

The Membership team is headed by Robert McDonald, and consists of Robert McDonald, Peg Oswald, Barb & Laird Milburn, Penny Youngren, Leslie Shiller, and Laurie & Sara Shaffer. Peg is taking over the Team Lead of the Membership Team while Robert McDonald is out of town until approximately November. She may offer to retain the leadership position when Robert returns. The Membership Team had their first meeting several months ago, and heard from Ernie Stech, a new member who reported having a bad experience when he and his wife first visited. They felt

that no one made them feel welcome. He has also written the Board about his feelings.

Some Comments and Discussion about Membership:

1. The Membership Team is building their approach around asking the new visitors “What can we do for you?”. The feeling is that people visit us out of some need, and if we can identify that need and meet it, we have a good chance of that new visitor becoming a member. New members get a booklet about the church.
2. The idea of how to grow the membership was discussed. Advertising used to be done in the Daily Sentinel, but it is expensive and we are not certain it makes a difference. Many people find us by our website. We also have a Facebook page, but no one on the Team was aware of what is on it. The Membership team has been asked to organize the Wednesday night social events that will be held regularly this fall.
3. Jan remarked on the MDD statistic that shows we have 300 friends, way more than any other MDD congregation. She wondered if those friends could be persuaded to be members, and volunteers in some part of the church organization? Tim pointed out that some of the friends make pledges. (See the section above which analyzes friend pledging).
4. Penny Youngren talked about how to grow the membership of the church to provide more income. She stated that you can’t run after more members to solve your money problems. Profit can’t be the mission of the church. You have to determine what the mission and delivery of the church is. You have to define Roles and Goals, and teach these to the congregation.
5. How do we measure the success of the church? We must serve people first, get them involved, and then the money will come. Engagement of the members should be the measure of success. We have to ask “who is this new visitor, how can we serve them?”. We don’t want to brag about who we are and what we do as a church to the new visitor. People will donate to the degree that they are engaged.
6. The Team talked about age differences in the church. A family church starts out with young families. The kids grow up and leave, and then there are no more young families. Young people today are not looking for Sunday morning services primarily. You have to get them engaged by interests. The age differences can be a great divide in the congregation.
7. Penny is encouraged about the new Membership Team. In addition to the Membership Team, all the members of the Board should consider themselves part of the membership effort as well.
8. Robert McDonald said he is focused on how to get new members by trying to understand their needs for visiting the church, and how we can meet those needs. He identified these needs as spiritual, political, and community. Robert gave an example of a new member who felt unwelcome when he and his wife first attended our services. There was no one who seemed to be interested in them, but rather existing members just visited with each other.
9. Robert felt that the age of our congregation is a problem, when younger visitors just see a "sea of grey heads". How do we cater to young people? He originally felt we needed a day care operation at the church, but Koinonia people told him that their day care operation did not seem to benefit their church growth in membership. So he has given up on the idea of day care at UUCGV.
10. To help draw in new people, a regular Wednesday night social gathering has been started which will provide food, child care, and a homework table. This will be a relaxed time for people to join together and get to know one another. The Wednesday nights will be managed by the Membership Team. Herb Feinzig asked if the Wednesday night gatherings might replace Sunday service for some people, and Wendy replied that it would supplement, not replace Sunday mornings. The food will be prepared for free on 3 Wednesdays each month by My Green



Junction as a gift to the church. Wendy is hoping someone will take the organizing of Wednesday gatherings on as their ministry. There is hope that by starting up a Wednesday night program again that we can attract new members by giving them a social setting to get to know the church.

11. There will be a focus on more social events through the year to build membership.
12. Chris Coolidge suggested that we should state the church mission at each Sunday service, as they do at FCC. She reports that FCC members all can state the church mission.
13. Someone from the membership team should contact visitors after their visit, and offer to send them a packet of information. Tim wondered if we should wait until several visits to contact visitors so as to not put them on the spot.
14. What happened to the idea of taking attendance by passing a pad down the rows, where visitors can be identified if they want to be?. Having visitors stand up to be identified was discussed, with some in favor of this and some opposed because it puts visitors in an uncomfortable position.
15. Robert feels that creating a social opportunity should be the first thing to do for visitors. Make them feel welcome, make them feel like they are part of something. When people sign the membership book, they should be contacted immediately by the stewardship team to talk about pledging. By the time someone signs the Membership Book, they are committed to the Church and should be familiar with pledging. Signing is a major step.
16. Rev. Wendy stated that for the past 2 years the church has been focused on reaching out to the outside community. That has worked well. We have not done such a good job of bringing people into our inside community. We have been transitioning in congregation size from a family church to a pastoral church, and it is hard for newcomers to break into a close knit family style congregation. . Wendy said that in a family size church, everybody knows how things run, but now that we are in the pastoral size range, Wendy and Mallory have been catching the things that fall through the cracks. We need to improve our structure to be able to use volunteers more effectively.
17. Jan Hyland suggested we could place cards in the pockets on the backs of the sanctuary chairs for people to express their interests. She said coffee hour is not always welcoming to visitors, and that maybe the congregation needs training for how to greet new visitors. There could be special greeters with designated colored name tags.
18. Chris Coolidge shared the newsletter from the First Congregational Church, and pointed out the section “How To Join Our Church”. She suggested that UUCGV needs a similar feature somewhere – our website, our newsletter, a brochure?

#### Membership Team Recommendations:

1. Identify visitors, discuss their needs and desires with them, and explain how the church can meet their needs. The ultimate success with a new visitor is to gain a new pledging member who is volunteering in an area that they are excited to be part of.
2. Continue the Wednesday evening get-togethers. These evenings are one way for visitors to get to know members of the congregation in a relaxed atmosphere.

#### Stewardship Team

The Pledge drive, run by the Stewardship Team, is vital to the financial security of the congregation. There has been a lack of continuity in the leadership of this team during the last several years. Last year the Minister and staff had to manage the pledge campaign due to an unfilled Board position.



This year we have a new team leader (Andrea Tanner) who has a lot of energy but has not done a pledge campaign before. She will need good support from those who have previously led stewardship campaigns.

Stewardship Team Recommendations:

1. Develop continuity of leadership in the Stewardship Team. This is essential from year to year to insure that pledge income is optimized. Provide formal training for Stewardship Team members so there is always a group of people who know how the pledge drives work, and how the Stewardship Team functions.
3. Develop expertise in persuading members to make optimal pledge amounts, based on their financial resources. This includes communicating to existing members the necessity of increases in their pledges whenever possible. This is a fine line to walk, but will be important in meeting our financial goals in future years.

### Special Events

Special events bring enjoyment to the church members, and make visitors feel welcome to our congregation. They are an important part of the life of the church. Music events in particular are well liked.

The Team feels that the congregation would be well served if a Special Events Team were formed to create and manage music performances, music series, guest speakers, and other types of events. There are several members and friends of the congregation who have the necessary skills and experience to do this. It takes finesse to work with performers and make them feel comfortable and appreciated. If done correctly, some of these special events could contribute financially to the budget. Successful events will take publicity and careful drafting of contracts.

Rev. Wendy expressed that we need to develop new sources of revenue which could include one-time community events such as dinners with a speaker, wine tasting, and music events.

### *Spirituality Through Music Series*

Peg Oswald and Kathleen Ruhleder (former UUCGV Music Director) were the coordinators for 3 years of this music series. Kathleen had lots of Mesa College contacts for talent. There were 4 performances each year, held every other month. Peg thought this was the correct number of performances for a year. The events were advertised in the Sentinel, which required a 1 month lead time. Peg also put posters on Main St. Financing was by a suggested \$10 donation. We paid the performers a fixed amount – Peg thought it was \$300. For various reasons, the third year wasn't a success.

Peg says there is a new member, Miriam Deming, who is a singer and friend of Pegs. She teaches music, and Peg thought if there were Miriam, Peg, and with additional help, she would like to try to revive the music series. The additional help would be the Special Events Team.

### *Potential Special Event Team Members*

In addition to Peg Oswald, our new member Mike Youngren has experience in managing music events in West Virginia, including a bluegrass music show which was televised. Also, Sterling VanWagoner (our Facilities Manager) says that he used to own a company that did rock music promotion and concerts. He said he would love to be part of a Special Events team for our church. Also, our long time members Walter and Janet Cummings have lots of experience in the music world.

Special Events

#### Special Events Recommendations:

1. Form a Special Events Team that would know how to create music series, music specials, and other events such as guest speakers. The Celebrations Team is responsible for the traditional events of the church like Thanksgiving Dinner, Easter Potluck, etc. A Special Events Team would have members who are experienced in planning music and other events, including financial arrangements with artists and performers, and advertising and publicity of these events to the outside community. We have at least 5 members and friends who already have these skills.

#### Social Events & Celebrations Team

Traditional or long-standing social events are the responsibility of the Celebrations Team. That team is charged in the Bylaws with coordinating the Annual Open House, Thanksgiving Dinner, and Easter Potluck. Any other potlucks or events shall be coordinated by the team holding that event.

The Membership Team has initiated the Wednesday night social times as a way to help introduce new visitors and members to the church. See the Membership Team section for detail. In general, the Team feels that social events are important to building church cohesiveness and long term growth for the church.

#### Social Events Recommendations:

1. Continue and enhance the Wednesday evening social events as a vehicle to build ties between current members, new members, and visitors.

#### Community Outreach

Being a liberal oasis in the conservative sea of Western Colorado requires that the church reach out to other like-minded churches and organizations. One way this is done is through participation in interfaith groups such as the Grand Valley Interfaith Council. Also, we need to get the message out to interest people that we exist and what we believe in and stand for.

One way we reach the larger community is through the use of our building by outside groups. For example, the New Dimensions Program makes extensive use of our facilities for its senior education classes.

#### Comments on community outreach to the Team:

1. What is the mission of the church regarding the community outside the walls of the church?
2. What is the financial future for Grand Junction?
3. Are the good manufacturing jobs going to return that we have lost?
4. What is our target demographic for members?
5. What relationship can we have with CMU that would be mutually beneficial?

#### Community Outreach Recommendations:

1. Advertise. Create an Advertising and Marketing Team or Volunteer position. We need help identifying our audience and how to go about this.
2. Participate in interfaith groups.
3. Make our facilities available for other organizations who share our values.
4. Create a Building Rental Team or Volunteer position to assist the staff in delivering quality experiences to the organizations who rent our facilities. This would save staff time and cost, and could allow us to continue and possibly expand our income from building rentals.

## Social Action

Our identity is to be a liberal oasis in a sea of conservatism. But you can't have a UU church without social action.

There are two parts to social action:

- a. Social Outreach – traditional charity – establish relations with other community organizations. This is not controversial, and the church is already doing this – e.g. soup kitchen, blessing box.
- b. Social Justice – trying to change the status quo. Is this defined as carrying signs and protesting? Confronting power? Social justice requires a long term commitment to changing the structure and economy of the Grand Valley. How do you effect systemic change? It is hard to change the status quo.

There are 4 other churches in the Grand Valley who have similar goals – the Episcopal Church of the Nativity, FCC, Two Rivers Center for Spiritual Living, Koinonia. They have formed an interfaith social justice group.

Comments on Social Action to the Team:

1. Social action programs at UUCGV have a negative history of making part of the congregation mad.
2. We need more focus in the church on social action. This has lagged in recent years.

Social Action Recommendations:

1. Social action can originate at multiple levels of the church – the Board, the various teams, and individual congregants.
2. Social action programs should have prior approval by the TLC and the Board, and have congregational buy-in before they are undertaken. .

## Appendix 1

### Board of Trustees Request to the Long Term Planning Team

Request from the UUCGV Board of Trustees to the UUCGV Planning Team

The Board's request to the Planning Team is based upon the current trends in Sunday services and the need to know what challenges and opportunities will be realized if these trends continue.

Our request is as follows:

Using 2014-2016 statistics in Sunday service attendance, membership levels and financial support (pledge levels, fundraising activities, and annual budgets), please project growth for the next 5 years and assess the impact in the following:

#### 1. Facility Use

The Board asked two questions:

Question 1: What is our total capacity for the sanctuary, and what options are available if we outgrow the capacity of the sanctuary?

Answer:

*Occupancy of certain areas are as follows:*

*Main floor – Sanctuary: 92; Upstairs kitchen: 13; Chancel: 32; Offices & Meditation Room: 4 each*

*Downstairs Areas – Basement main room: 110; Classrooms: 4 each*

Also see [Maximum Occupancy Limits for Building, Appendix 3, Discussion with Grand Junction Fire Marshall, Seven Possible Options for Two Worship Services](#), and the section [Attendance Implications of Adding Members to Balance Budget](#)

Question 2: How will growth affect the weekday use and multiple same day events/programs and potential rentals?

Answer:

See the section [Building Rentals](#)

#### 2. Programming

The Board asked two questions:

Question 1: How will growth affect current programming, in particular our RE programs?

Answer: See the section [Religious Education Program \(RE\)](#), and [Sunday Services and Attendance](#)

Question 2: Will growth place more strain on our many volunteers and their capacity to manage programs?

Answer: See the section [\*Leadership Development\*](#)

### 3. Staffing

The Board asked one question:

Question: If we assume greater levels of participation from attendees and members, what stresses will this place on the staff and our Minister? What options are available to help with this?

Answer: See the sections [\*Minister and Staff\*](#) and [\*Leadership Development\*](#)

### 4. Finances

The Board asked 2 questions:

Question 1: Managing growth in advance of increases in financial resources is often one of the greatest challenges for small organizations. How will we meet our financial obligations?

Answer: See the section [\*Financial Analysis & Projections\*](#)

Question 2: What are some opportunities for meeting our financial obligations that we have not identified?

Answer: See the section [\*Non-Pledge Income\*](#)

### 5. Congregational Cohesion

The Board asked two questions:

Question 2: How will growth affect member's relationships with each other as they see more unfamiliar faces around them?

Answer: See the section [\*Church Size & Growth\*](#)

Question 2: How will we bring new members into roles of participation?

Answer: See the sections [\*Membership Team\*](#), and [\*Appendix 4 - Nine Surprising Patterns in Growing Churches\*](#)

## Appendix 2

### Discussion with Grand Junction Fire Marshall Concerning Building Occupancy

Tue, May 23, 2017

Last week I met with Chuck Mathis, the Grand Junction Fire Marshall, about how many people they consider a safe load in the sanctuary and basement. He explained that both the Fire Department and the Mesa County Building Dept. use the same calculations based on the International Fire Code books, but that he could give us an informal number, whereas the Building Dept. requires numbers prepared by an architect and shown on a blueprint of the building. He graciously offered to save us the expense of hiring an architect to arrive at the same numbers.

After describing and sketching our setup for him, he determined that we fit into the International Fire Code category of "assembly un-concentrated tables and chairs". This means we don't have pews, which would put us in a different category. Also, if we hooked chairs together, this would change things, since people would not be able to move between rows as easily. I don't think our chairs hook together anyway now.

The rule for our category stipulates 15 square feet per person, which allows for space between rows and space for aisles.

I did a careful measurement of the usable spaces in the sanctuary and basement, and came up with these figures:

Sanctuary: 1381 square feet, allowing 92 people.

Upstairs Kitchen: 195 square feet, allowing 13 people.

Chancel: 480 square feet, allowing 32 people

Basement: 1644 square feet, allowing 110 people.

The chancel is treated as a separate space, since the congregation doesn't have seating there. We do appear to have plenty of capacity for the choir and those conducting the service.

The kitchen could be used as overflow space, assuming there are no tables set up there. That would give us a total occupancy limit of 105 people. The library room would have to be treated as an office, allowing 3 to 4 people only, because there is only 1 exit from it. The foyer doesn't count, since it is assumed that people in the foyer will be coming into the sanctuary for whatever the event is.

The Fire Marshall said he assumed that no drugs or alcohol would be involved in our events. He said that is what gives him the most concerns about other venues. He also said that overall our setup is very satisfactory, with our sprinkler system on both floors, 2 double exit doors for the sanctuary, and 2 sets of stairs to the basement.

The Team discussed the implications of these numbers, and had several concerns.

1. Our rental agreements need to stipulate these occupancy limits, and somehow try to insure that renters will agree to honor them. We wondered if a lawyer should review any language in the rental agreement to that effect?

2. What is our liability concerning the behavior of renters if they disregard the occupancy limits?

We are publishing these numbers because of their immediate relevance to church operations. The team has not had time yet to discuss the long term implications on Sunday services of bumping up against these limits on a regular basis.

One other note from the Fire Marshall - we are not required to post any signs stating the occupancy limits of the various areas.

John Mayo

Appendix 3

Data and assumptions for financial projections

Table 4. Summary Table of Historic and Projected Incomes, Expenses, and Membership for Church Years 2002-2023

The table below shows the historic budgeted income, expense, and membership from 2001-02 through 2017-18, and projected income, expense, and membership numbers for 2018-19 through 2022-23.

Church Year (July 1 thru June 30)	Total Income (2002-2018 uses Historic Budget values, 2019-2023 uses Projected values)	Total Historic Budgeted Expenses	Income less Expense Historic	Income Less Expense Projected	Membership Historic	Membership Projected	Annual Pledge + Offering Income per member	Additional Members needed to cover projected budget shortfall	Total Projected Members to Balance Budgets
	2019-2023 Projected using 5% annual growth in non-pledge income (from 2018 number), 2014-2018 trend for Pledge + offering income with 2.5% inflation, no building loan interest gift, no releases from reserves	Projected using 2.5% Salary increase, New DRE or Intern Salary, and Mortgage Pmts starting in 2018-19	Income less Expense Actual	Income Less Expense Projected	Based on Historic Membership Records	Projected Membership using 2014-18 Trend	Projected using 2014-18 Trend	Projected using 2014-18 non-top 3 avg pledge amount of \$1334	Total Projected Members to Balance the Projected 2019-23 Budgets
2001-2002	\$89,104	\$91,200	-\$2,096		74		\$993		
2002-2003	\$134,105	\$113,113	\$20,992		84		\$1,412		
2003-2004	\$131,402	\$137,422	-\$6,020		95		\$1,021		
2004-2005	\$137,229	\$143,522	-\$6,293		98		\$1,057		
2005-2006	\$162,632	\$169,850	-\$7,218		99		\$1,273		
2006-2007	\$155,896	\$158,715	-\$2,819		99		\$1,240		
2007-2008	\$151,885	\$154,906	-\$3,021		95		\$1,368		
2008-2009	\$162,189	\$162,500	-\$311		87		\$1,667		



<b>Church Year (July 1 thru June 30)</b>	<b>Total Income (2002-2018 uses Historic Budget values, 2019-2023 uses Projected values)</b>	<b>Total Historic Budgeted Expenses</b>	<b>Income less Expense Historic</b>	<b>Income Less Expense Projected</b>	<b>Membership Historic</b>	<b>Membership Projected</b>	<b>Annual Pledge + Offering Income per member</b>	<b>Additional Members needed to cover projected budget shortfall</b>	<b>Total Projected Members to Balance Budgets</b>
	2019-2023 Projected using 5% annual growth in non-pledge income (from 2018 number), 2014-2018 trend for Pledge + offering income with 2.5% inflation, no building loan interest gift, no releases from reserves	Projected using 2.5% Salary increase, New DRE or Intern Salary, and Mortgage Pmts starting in 2018-19	Income less Expense Actual	Income Less Expense Projected	Based on Historic Membership Records	Projected Membership using 2014-18 Trend	Projected using 2014-18 Trend	Projected using 2014-18 non-top 3 avg pledge amount of \$1334	Total Projected Members to Balance the Projected 2019-23 Budgets
2009-2010	\$135,656	\$132,350	\$3,306		88		\$1,375		
2010-2011	\$134,846	\$136,734	-\$1,888		86		\$1,442		
2011-2012	\$153,006	\$152,950	\$56		82		\$1,713		
2012-2013	\$145,024	\$133,693	\$11,331		84		\$1,583		
2013-2014	\$142,699	\$119,910	\$22,789		73		\$1,712		
2014-2015	\$146,242	\$132,575	\$13,667		74		\$1,557		
2015-2016	\$145,379	\$146,657	-\$1,278		76		\$1,611		
2016-2017	\$146,764	\$165,149	-\$18,385		81		\$1,660		
2017-2018	\$173,600	\$179,236	-\$5,636		88		\$1,631		
2018-2019	\$181,229	\$195,925		-\$14,696		90	\$1,661	17	107
2019-2020	\$188,627	\$210,642		-\$22,015		93	\$1,657	24	117
2020-2021	\$196,107	\$230,438		-\$34,331		97	\$1,653	36	132
2021-2022	\$203,672	\$234,315		-\$30,643		101	\$1,649	30	131
2022-2023	\$211,327	\$238,274		-\$26,947		104	\$1,646	29	133

### Budget Projection Assumptions:

1. Minister & Staff Salaries increase 2.5% per year over 2017-18 salaries as a base with \$10,000 extra for new Student Intern Minister
2. 536 Ouray mortgage payments start in 2018-19, but \$27,000 already saved for the first year, and \$16,000 saved for the second year. Full payments start in 2020-21
3. Non-salary projected expenses grow at 2002 - 2018 long term trend rate of \$563 per year
4. Projected pledge + offering income grows at 2014 - 2018 trend rate plus a 2.5% inflation factor per year
5. Additional members to cover shortfall assumes 5% growth per year in additional non-pledge income
6. Projected non-pledge income grows at 5% rate year over year from 2017-2018 base amount
7. No Building Loan Interest Gifts in future, and no releases from Reserves in future for non-pledge income projection
8. 2019-2023 (red numbers) are projected values
9. New DRE hired in 2018-19 at salary of \$25,000 (\$10,000 increase over FY18); or Student Intern Minister hired at \$10,000 per year in 2018-19
10. Minister continues at 25 hours per week thru FY23
11. 2013-14 to 2017-18 average pledges without top 3 pledges (\$1334) used to project membership to balance the budget shortfall.

## Appendix 4

### Nine Surprising Patterns in Growing Churches

#### Nine Surprising (Or not so Surprising) Patterns in Growing Churches (from the Internet)

CmWD Conference on Church Growth  
(Presenter Dr. Charles Arn)

1. The single most important factor in determining whether visitors return to a church is how "friendly" they find the congregation. (If the congregation is not friendly the uplifting sermon and the excellent music might inspire them to come a second time, hoping folks will be friendlier when they return.)
2. "Friendliness" is determined in the 10 minutes after the worship service ends, and is measured in how many people reach out to say hello, not in the depth of the contact.
3. In the average numerically stable church, 1 in 10 visitors return a second time. A higher percentage of return indicates a propensity to grow.
4. On average, members who have joined in the last 2 years are enthusiastic, eager to help, and forward looking.
5. When new members are contacted by staff or ministers regarding an opportunity for involvement, they tend to judge it as less sincere or appealing as when that contact is made by a member of the church.
6. The single most important factor in determining whether new members continue to stay involved is the number of friendships they make in the congregation.
7. Old members view new members as either assets or liabilities. The default perception is liability.
8. Growing congregations have a ratio of 60 roles or tasks for every 100 members and active affiliates.
9. Growing congregations have 1 in 5 of those roles/task filled by new members.

## 10 Characteristics of an Assimilated Member

1. 6-7 friends in congregation
2. Role/task consistent with gifts, interests, skills, personality
3. Involved in a small group
4. Regular worship attendance
5. Gives financially
6. Understands and identifies congregational goals
7. Feels a sense of spiritual growth
8. Taken a public step of affiliation
9. Engaging spiritual practices
10. Sharing faith with friends and family