



Strategic Plan

Submitted January 2012

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Introduction

In August 2011, we welcomed two UUA Consultants into our congregation: David Rickard and Bill Clontz. They recommended that we update the strategic plan, prioritize our goals and implement a membership development plan. Our team studied church (worship) attendance, religious education participation (children and adults) and financial data from the last 10 years. We met with several team leaders to establish priorities for future programming; we met with members of the worship team, children's religious education, and adult education teams to determine our accomplishments in the last several years, our current situation, and our future goals.

One of the challenges we faced was determining what our contribution would be to the space needs discussion. Our purpose was clearly to determine programming priorities. The Building Needs Assessment Team will be responsible for determining the facility needs that will support our future programming goals. However, it was impossible for the Team to avoid the discussion of space as it is so pressing at this time. For this reason, the Team has included some general recommendations for the next 1-2 years and placed the Long Term Space Recommendations that resulted from many of our conversations as an appendix. In addition, a map showing the location of residences of members and friends has been created and is available.

This Strategic Plan contains the following elements

- 1) Worship Recommendations
- 2) Lifespan Religious Education Recommendations
- 3) Staffing Recommendations
- 4) Space Needs Recommendations (for the next 1-2 years)
- 5) Financial Recommendations

The appendix contains several documents:

Appendix A – Worship Trends--average adult worship attendance history and projected worship attendance

Appendix B - Children's Religious Education Attendance history. We hoped to include average adult RE attendance but the record keeping was not as detailed as it was for children.

Appendix C - Voting Membership.

Appendix D - Historical and Projected Pledging Patterns.

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Worship Recommendations

Recent Accomplishments

There is a strong consensus that the worship experience at Emerson Chapel has transformed in many strong and dynamic ways in the last several years. Following are some of the accomplishments.

- 1) Hearing Assistance Devices purchased
- 2) Increased strong Youth participation in worship
- 3) A varied and growing music program
- 4) A strong consistent pianist
- 5) Established Song Leader Team
- 6) Established Liturgist Team
- 7) Intergenerational worship every Sunday
- 8) Consistent liturgy
- 9) Year-round worship
- 10) Increased diversity of theologies expressed in worship
- 11) Full time ministry
- 12) Sermon-writing classes
- 13) Expanded seating using temporary metal chairs
- 14) Adult attendance has grown an average of 5.2% a year since 2001, 6.9% a year since the arrival of our current settled minister, and 9.1% a year since the implementation of intergenerational worship, children's chapel, and the dedicated RE hour.

Challenges

- 1) We are at 80% capacity in the desirable seating (non-metal chairs) most Sundays
- 2) Our sound system does not support our worship and our music programs
- 3) Attendance at Sunday worship has grown progressively for the last 10 years, but we seem to be moving towards a plateau, with worship attendance hovering at about 80% of capacity.

Goals

- 1) Move to 2 worship services in the next 1-2 years to expand worship capacity
- 2) Purchase additional hymnals
- 3) Invest in our sound system and lighting system
- 4) Continue to invest in hearing assistance devices
- 5) Restore funding for guest speakers
- 6) Budget for choral music and pianist rehearsal time
- 7) Continue to invest time in the sermon-writing program to strengthen lay involvement in worship
- 8) Develop a worship associates program to strengthen our worship ministry
- 9) Continue to integrate all ages in worship programming

Life-Span Religious Education (RE) Recommendations

Adult Education

Until 2007, adult education consisted of monthly forum sessions held before worship and the occasional weeknight class. When we implemented the Dedicated Religious Education Hour in 2007/08, new possibilities opened up for us.

Recent Accomplishments

- 1) Two adult programming offerings every Sunday with total attendance ranging from 15 to 45
- 2) Our Unitarian Universalist Roots now held on Sundays during the Education Hour instead of weeknights, with a strong increase in attendance, especially among young families who found weeknights prohibitive
- 3) The development of an Adult Education Facilitator Team this year
- 4) Multiple opportunities for members and friends of the congregation to offer adult education sessions
- 5) Strong partnerships built between worship and children's education to ensure a strong consistent door-to-door experience
- 6) Covenant Group Program established and then restructured
- 7) One month of Adult RE added to church year (August)

Challenges

- 1) Space is an issue. We current have four spaces at our disposal – the sanctuary, the hearth room, the administration area, and the small classroom off the hearth room. The hearth room and administration area are high traffic areas not conducive to creating a learning environment. The administration area and the small classroom each can only hold a maximum of 7-8 people.
- 2) Sound. Only the sanctuary can accommodate those with hearing issues as we can use the handheld mikes for discussion.
- 3) Adult education is largely confined to Sunday morning.
- 4) Our programming is rarely comprehensive and rarely focused on consistent spiritual deepening. We tend to do what is working in the moment. It can focus more on the head than on the heart.

Goals

- 1) Continue to deepen the partnership with Worship and Children's RE
- 2) Expand adult education offerings beyond Sunday morning
- 3) Add additional Sunday morning programming a worship attendance grows
- 4) Develop programming that will support the movement to two Sunday services
- 5) Offer more multi-session classes that provide opportunities for intentional spiritual deepening
- 6) Continue to strengthen the Covenant Group Program

Children and Youth Education

Accomplishments

- 1) Director of Religious Education position grown from 16 hrs/wk to 23 hrs/wk
- 2) Establishment of the pillar model of education
- 3) Several RE rooms added through two summers of renovations
- 4) The hiring of a second nursery care worker
- 5) Intergenerational worship hour which has required a more dynamic children's chapel
- 6) A trained Children's Chapel Ministry Team (CCMT)
- 7) A volunteer dedicated to RE Assistant scheduling (previously scheduled by the DRE)
- 8) A longer RE year (classes begin in August now)
- 9) A more diverse RE Teachers pool
- 10) A dynamic Youth fellowship with dedicated Youth leaders.

Challenges

- 1) Our current programming space is inadequate. There is no room to grow. Our classes are overcrowded and there is little ability to incorporate curriculum elements that require movement
- 2) Children and Youth program has the largest volunteer team in the congregation. We are consistently challenged in the areas of recruitment and leadership development
- 3) We are witnessing a plateau in RE attendance which is highly likely attributable to our space restrictions. We have reached capacity.

Goals

- 1) Continue implementing cost-effective creative solutions to maximize the use of our small space
- 2) Immediately increase the square footage available for children's and youth RE
- 3) Adjust the program as needed to support the move to two worship services
- 4) Explore and if possible implement 2 Children's Chapel groups – one for older children and one for younger
- 5) Funding for a paid Youth Coordinator
- 6) Make the children and youth program user friendly from an ADA perspective
- 7) Increase our OWL programs to include the K-1st, 4th-6th, and 10th-12th grade curriculums. This would include facilitator recruitment and training
- 8) Add more social-justice/service-project work for children and youth. This could include Sunday morning RE curriculum, intergenerational work with the entire congregation, and service trips for junior and senior high youth
- 9) Recruit and train an expanded Children's Chapel ministry team, especially vital if/when we move to 2 services and/or two Children's Chapel groups

Staffing Recommendations

We recommend that the congregation be continually mindful that we should be staffing for growth. We need to intentionally grow our current part time staff positions and add additional positions as needed. We also need to ensure that we are following the fair compensation guidelines established by the Unitarian Universalist Association.

The following staffing and compensation goals were developed by Barb Brown, a member of our congregation, who is trained as a Fair Compensation Consultant by the UUA. We include her recommendations for ongoing consideration by the Board of Trustees.

Moving to Fair Compensation

This is a moving target on several fronts:

- 1) Each member of our staff annually has more experience and moves up in the levels within their own individual brackets. So, our minister is just over mid-range now (about 7 years is about mid-range) and in five years will be at max. These figures are VERY ROUGH.
- 2) Each year we have a cost-of-living factor to consider.
- 3) At some point, possibly within these five years, we may change from a small church to a medium sized church for these grids. We will not change from the Geo-index where we are placed. The two which will be added this year are for cost of living cities beyond what St. Louis can imagine. I did not factor our own growth to a small to medium church into this functionality.

	FY13	FY14	FY15	FY16	FY17
Minister	61840	66114	68264	74851	78320
DRE	Shown here as Full-time Annual amount				
	33,500	36,180	37265	38383	40185
Admin	----- PER HOUR -----				
	15	16	17	19	19.5

Professional Staff					
SiCS*	Dying FTE= < this	Overwkg Volunteers	Healthy FTE ~ this	Energetic	Growth FTE >= this
50	0.25	0.3 - 0.4	0.50	0.6 - 0.7	0.75+
100	0.75	0.8 - 0.9	1.00	1.1 - 1.2	1.25+
150	1.25	1.3 - 1.4	1.50	1.6 - 1.7	1.75+
200	1.75	1.8 - 1.9	2.00	2.1 - 2.4	2.5+
250	2.25	2.3 - 2.4	2.50	2.6 - 2.9	3+
300	2.50	2.5 - 2.9	3.00	3.1 - 3.4	3.5+

SiCS=souls in church on Sunday; difficult word to wrap UU heads around; but it includes those for whom we service unable to attend SUN (think of home bound), college, etc.

Emerson has 202 SoS

FTE = Full time equivalent (UUA this means 12 Units for professional staff); *professional staff* includes ONLY exempt employees, examples: ministers and religious education professionals, communications/web, volunteer coordinator, music director (not pianist/organist, unless they wear this hat), fundraising). Support staff are hourly and usually not monthly/exempt, 1FTE professional requires 0.5 support staff

Position / SOS	Minister	DRE	Musician#	Office Admin~	Grounds and Building
200 - 249	1	0.5	0.10	0.75	By Contractors until building and grounds usage is so great that a full time "sexton" is needed
	1	0.75	0.15	0.80	
	1	1	0.20	1.00	
250 - 299	1	1	0.25	1.00	
	1*	1^	0.40	1^A	
300 - 349	1*	1^	0.50	1^A	
	1.5	1.5^	0.50	1.5^A	
	1.5**	1.5^A	0.50	1.5^A	
	1.6**	1.6^A	0.60	1.6**	

* Strong other lay support services are needed, or consider a part-time ministerial student for volunteer or membership management, or both.

** In addition to above, at this point, a part-time student minister, or part-time asst minister may be needed.

^ In additional to a full time equivalent (either one person, or two part time), congregation will begin to need an Asst DRE

^A A half-time Assistant DRE will be needed to sustain RE growth at this point

Office Admin will need to be at about 1/2 the time of all Minister and DRE professional staff. At some point additional help will be needed: ^consider adding very part-time staff for projects as "gifts" of current admin are assessed: book-keeper, or simply an assistant to help with materials, or data entry. While these may easily be volunteers who help fill-in while part-time staff are hired, in order to keep things current and up-to-date, paid staff will be needed as congregational needs grow.

Space Recommendations for the next 1-2 years

This strategic plan is itself a result of our space issues. We know that we have outgrown our current facility and that our congregation will make the decision in the next year as to whether we can address our space needs at our current location or should consider relocating.

Regardless, we will likely be in our current location for at least the next 1-2 years and thus it is important that we continue to be extremely mindful of how we use our current building.

As the UUA Consultants did in August, we recommend that our leadership work as creatively as it can to increase the square footage that is available for the Children's Religious Education Programming as soon as possible. This is the highest priority and the area that is most affected by our inadequate facilities. This could mean renting trailers or renting a nearby house for office space and using the current offices as classrooms. This could mean holding all adult education in the sanctuary and freeing the rest of the building for children's RE. All of these solutions have less than favorable elements, but we must continue exploring all our options so as to accommodate the ongoing stream of visitors, many with young children, that seek us out for their spiritual growth. We must be able to continually provide the room we need to grow.

Financial Recommendations

As is made quite clear in Appendix D, while our annual budget has increased substantially in the past ten years, it is our highest donors that continue to provide the bulk of the financial resources needed to grow our programming. Our average pledge has not kept pace with the growth of our operating budget. The growing gap between the average pledge and the median pledge is troubling because it leaves us quite vulnerable. If we were to lose one or two of our top donors, that would leave us in a very difficult financial place.

These trends are not unusual in a congregation that has experienced strong membership growth. The percentage of new members in our congregation, many of whom came relatively "unchurched," is high and this indicates the need for ongoing education regarding stewardship and what it takes to support a growing thriving congregation.

We support the UUA Consultant's recommendation that our congregation develop an Annual Stewardship Campaign that is centered on achieving a greater percentage of Fair Share Givers in our congregation. If we are to fund the goals set forth in our recommendations, and if we are to have a successful Capital Campaign, this is extremely important.

Appendix A – Worship Trends

Adult Worship Attendance/Sunday during regular worship months

Note: children's attendance not included as we did not begin accurately recording children's attendance until September 2010

Year		
01/02	46	
02/03	47	
03/04	49	
04/05	49	
05/06	52	
06/07	51	
07/08	52	
08/09	56	
09/10	66	
10/11	72	
Av. Annual Incr. since 01/02		5.2%
Av. Annual Incr. since arrival of settled minister (5/6)		6.9%
Av. Annual Incr. since implementation of dedicated RE Hour (7/8)		9.1%

Projected Adult Attendance/Sunday 2011/12 – 2016/17 using:

	5.2%	6.9%	9.1%
11/12	75.7	85.5	78.6
12/13	80	85.5	85.7
13/14	83.8	91.4	93.5
14/15	88	97.7	102
15/16	93	104.4	111.3
16/17	97.8	111.6	121.5

Significant Changes

2005/06 – arrival of current settled minister

2006/07 – begin holding regular worship in August instead of September

2007/08 – begin dedicated RE Hour

2009/10 – begin offering Children's Chapel year round

2010/11 – begin Adult RE in August

2011/12 – begin year round worship

2011/12 – begin All Ages RE in August

Appendix B – Children’s Religious Education Attendance Trends

	Enrollment	Av. Sunday Attendance
1997- 1998	60	32
98/99	41	not available
99/00	30	20
00/01	40	26
02/03	60+	30
03/04	51	26
05/06	39	26
06/07	45	28
07/08	59	22.5 (first year of Dedicated RE hour)
08/09	40	20
09/10	35	20
10/11	60	31
11/12 to date	60	28

Significant factors

98/99 – congregational tension over a significant issue led to several families departing from the congregation with consequent decrease in registration and attendance.

05/06 – new DRE mid-year

06/07 – DRE increased from 16 to 20 hrs.

07/08 – DRE increased from 20 – 24 hrs. (first year of Dedicated RE hour)

09/10 – DRE decreased from 24 hrs to 16 hrs,

10/11 - new DRE

11/12 – new DRE, increased from 16 to 23 hrs.

Appendix C – Voting Membership* Growth Trends

- Although we have a growing number of youth who have become voting members, they were not included in these numbers as this affected only the most recent year. In order to provide consistency we have included only adult voting members in our calculations. This will likely change in future years and for future strategic plans.

These are the voting members registered with the UUA on January 31st of the year. Thus 2001 numbers reflect our membership on January 31, 2001, etc.

2001 – 71		
2002 – 70	-1.4%	8 joined, 9 left
2003 – 63	-10%	17 joined, 24 left – dedication of new sanctuary
2004 – 68	8%	14 joined, 9 left
2005 – 74	8%	6 joined, 0 left – arrival of current settled minister
2006 – 84	13.5%	22 joined, 10 left
2007 – 96	14.3%	12 joined, 0 left – first year of Dedicated RE hour
2008 – 98	2%	10 joined, 8 left
2009 – 89	-9.2%	5 joined, 14 left
2010 – 96	7.9%	17 joined, 10 left
2011 – 117	21.9%	22 joined, 1 left

Average growth rate in the last 10 years: 5.5% annually

Average growth rate since arrival of current minister: 8.4% annually

133 signed the membership book from 2001-2011

85 (64%) left the membership rolls from 2001-2011

Since 2005, with the current minister

88 signed the membership book

43 (49%) were removed from the membership rolls

Reasons for removal:

- 1) death
- 2) moved
- 3) withdrew from congregation

Appendix D – Pledging: Historical Trends and Future Projections

APPENDIX D Emerson UU Chapel 5-Year Projections

	2013	2014	2015	2016	2017	
INCOME	23.6%	5.0%	10.0%	7.5%	10.0%	% above previous year
Operating Pledges	\$ 205,000	\$ 215,250	\$ 236,775	\$ 254,533	\$ 279,986	
Profit from Previous Year Fundraising	\$ 5,000	\$ 10,000	\$ 7,500	\$ 7,500	\$ 10,000	
	\$ 210,000	\$ 225,250	\$ 244,275	\$ 262,033	\$ 289,986	
EXPENSES						
Salaries	\$ 107,713	\$ 121,030	\$ 133,859	\$ 149,401	\$ 167,465	
Insurance/Retirement	\$ 12,793	\$ 11,411	\$ 11,626	\$ 12,285	\$ 20,245	
Employer Payroll Taxes	\$ 8,240	\$ 9,222	\$ 10,200	\$ 11,384	\$ 12,761	
Professional Expenses	\$ 8,239	\$ 8,782	\$ 9,435	\$ 10,172	\$ 10,645	
Benefit & Payroll Admin	\$ 300	\$ 300	\$ 325	\$ 325	\$ 325	
Total Salaries & Benefits	\$ 137,285	\$ 150,746	\$ 165,445	\$ 183,567	\$ 211,441	
Mortgage Expense	\$ 27,000	\$ 27,000	\$ 30,000	\$ 30,000	\$ 30,000	
Building & Grounds	\$ 15,950	\$ 12,425	\$ 11,925	\$ 10,925	\$ 10,925	
Aesthetics	\$ 150	\$ 150	\$ 200	\$ 250	\$ 300	
Utilities	\$ 10,800	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000	
Business Insurance	\$ 3,600	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,000	
Office Supplies & Equipment	\$ 2,500	\$ 3,000	\$ 3,250	\$ 3,500	\$ 3,750	
Professional Services Fees	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	\$ 1,200	
Marketing & PR	\$ 320	\$ 500	\$ 1,000	\$ 1,000	\$ 1,000	
Professional Dues	\$ 520	\$ 600	\$ 600	\$ 600	\$ 600	
Bank Charges	\$ 300	\$ 300	\$ 300	\$ 300	\$ 300	
Total Operations & Administration	\$ 62,340	\$ 61,175	\$ 64,475	\$ 63,775	\$ 64,075	
Worship	\$ 2,380	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	
Welcoming Committee	\$ 205	\$ 500	\$ 500	\$ 500	\$ 500	
Love First	\$ 200	\$ 300	\$ 300	\$ 300	\$ 300	
Diversity Alliance	\$ 650	\$ 700	\$ 700	\$ 700	\$ 700	
Adult Education & Programming	\$ 100	\$ 150	\$ 150	\$ 150	\$ 150	
Hospitality	\$ 260	\$ 500	\$ 500	\$ 500	\$ 500	
Sustaining Membership	\$ 230	\$ 500	\$ 500	\$ 500	\$ 500	
Children's Religious Education	\$ 6,000	\$ 7,000	\$ 7,250	\$ 7,500	\$ 8,000	
Senior High Youth	\$ 150	\$ 300	\$ 450	\$ 600	\$ 750	
Total Chapel Life	\$ 10,175	\$ 12,950	\$ 13,350	\$ 13,750	\$ 14,400	
TOTAL BUDGET	\$ 209,800	\$ 224,871	\$ 243,270	\$ 261,092	\$ 289,916	

Historical Pledging Information

Year	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012
Total Pledges	70522	81940	92690	118475	128522	142037	138114	153539	161039
Average Pledge	1640	1781	1685.27	1910.89	2072.94	2029	2301.9	2132.49	2147
Median Pledge	1200	1200	1000	1200	1200	1200	1500	1440	1320
Pledging Units	43	46	55	62	62	67	60	72	75
# of Pledgers	63	68	74	84	88	89	85	105	110
Av/Med Dif.	440	581	685.27	710	875	829	800	693	827
% change in average		8.50%	-5.31%	13.40%	8.48%	-2.12%	13.40%	-7.34%	0.70%
%change in avg/med diff		32%	18.00%	4%	23%	-5.25%	-4%	-13.4%	19.30%
% change in total		16.10%	13.12%	27.80%	8.48%	10.52%	-2.76%	11.16%	4.88%
% change in pl. units		7.90%	8.82%	12.70%	0.00%	8.10%	-10.4%	20%	4.20%

Annual Incr. in Total Pledges	11.16%
Annual Incr. in Av. Pledge	3.71%
Annual Incr. in Pledge Units	5.89%
Change in Av/Median Diff.	9.20%

Appendix E

The following long term space needs recommendations are the result of our conversations with Staff, Worship, Adult Education and Children's Education. We offer these to the Building Needs Assessment Team for their consideration.

- We need classrooms that allow our children to be able to move around. After sitting in the service and then Children's Chapel, they need to move a bit and they need to be able to learn through activities that allow physical movement.
- Nine classrooms: a nursery, Pre-K, Grades K-1, Grades 2-3, Grades 4-5, Grades 6-8, Coming of Age Room, Youth Lounge, and a Flex room.
- Three classrooms for Adult Religious Education to be used for Adult RE Session 1, Adult RE Session 2, and "Roots" Class. These could double as weekday meeting space
- Two rooms for Children's Chapel due to a large group and age differences.
- Sound-proof offices for the Minister and Religious Education Director. Larger offices for the Office Administrator and an additional staff person. They should be considerably larger than the current offices used by our staff.
- Storage rooms for all aspects of congregational functioning: Fellowship Resources, Religious Education , Worship and Music Resource, Building and Grounds, etc.
- A kitchen that is large enough to hold several people working together and the equipment to handle larger events and social functions. Storage area on the same floor.
- Hospitality Area – space to be able to comfortably meet and greet people, talk/mingle and have refreshments.

Appendix F
January 2012

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Membership Development Plan
Fiscal 2012 – 2017



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Summary

Introduction

This report is submitted as part of, and in support of, the FY 2012-2017 Long Range Plan. It is designed to ensure that the Church's goals of growth and community are met. The plan reflects the responsibilities and work regularly accomplished by the Welcome Team, the Sustaining Team, and the Minister throughout the church year.

Jeff Gidday and Emily Covert (Co-Leaders, Welcome Team), Mark Fish and Lezza Baker (Co-Leaders, Sustaining Team), and Rev. Krista Taves created this plan. Special Thanks to the UU Sterling Church and the UU Fredericksburg Church for providing the template for this document.

Welcome and Sustaining Teams - Purpose

The purpose of the Welcome Team is to attract, welcome, mentor, and assimilate newcomers. By doing this, we provide opportunities for visitors and friends to become members, and a structure for informed, active membership that supports the mission and programs of Emerson UU Chapel.

The purpose of the Sustaining Team is to ensure the nurture, growth, and belonging of existing members, including the continued mentoring and assimilating of newer members. This team also provides a structure for informed, active, engaged membership that supports the mission and programs of Emerson UU Chapel.

This plan also acknowledges Welcome's and Sustaining's interdependency with other Emerson Chapel teams and the Board of Trustees, as well as each individual member, to enable our institutional growth. Our ability to attract and retain members is, ultimately, a function of the strength and vitality of our entire congregation.

Anticipated Membership Growth

Emerson UU Chapel is committed to growth, not just in numbers of members, but also in the development of a committed and engaged community. While adding new members is a valuable goal, our greater priority is to help members become full participants in the life of Unitarian Universalism and Emerson UU Chapel, sharing their resources and talents, both in our congregation and in the broader community.

In the past ten years (2001-2011), the voting membership of our congregation has grown approximately 5.5% per year. In the past six years (2005-2011), and since calling our current settled minister, our membership has grown approximately 8.4% per year. Our growth from 2001-2003 was influenced by the building of our new sanctuary and the remodeling of our program facilities. Our growth from 2007-2009 was influenced by significant changes in our Sunday programming structure. In both cases, once these institutional changes were worked through, we experienced stronger membership growth. We anticipate that this pattern could repeat itself as we launch into the process of assessing and acting on our space needs.

We are currently experiencing space constraints at our existing facility, and are now at capacity. We anticipate that, until we are able to expand our facilities, our growth may stay at modest levels. With expansion of our facilities, we anticipate an increased rate of growth that modestly exceeds our growth for the past six years, when we had increased worship capacity but no concomitant increase in RE capacity.

The long-range plan anticipates membership growth in FY (starts in July 2012) 2012, 2013 and 2014 to be 5.5% a year. Once in a larger facility, and for the first three years thereafter, we anticipate growth to increase to 10% per year (FY 2015, 2016, and 2017). We anticipate that, at these growth rates, our voting membership will be 182 in 2017.

Welcome and Sustaining Initiatives

We have defined several core competencies we must maintain to fulfill our goals. We must:

- Attract visitors
- Welcome newcomers
- Actively integrate members, friends, and newcomers into the life of our fellowship
- Meet the ongoing needs of all: Intellectually, spiritually, and emotionally

Attracting Visitors

Our ability to attract visitors has been fairly consistent over the last few years. We developed a regular “Greeter Team” in 2010 and this group morphed into the Welcome Team shortly thereafter. We have averaged 2-3 new visitors per service. Most visitors are new to Unitarian Universalism. We attract a range of ages from younger adults with children to older individuals without children. Since we became a welcoming congregation, we are attracting more sexual minorities. Given our mid-west location, our growth relies on attracting people unfamiliar with Unitarian Universalism.

Today’s situation

We attract visitors in several ways:

- By our web site, www.emersonuuchapel.org, our most productive outreach tool
- Through word-of-mouth with current members and friends
- By participating in the annual Pride Parade and distributing information about Emerson and UUism
- By being UUA-certified as a “Welcoming Congregation”

Challenges

- Our space is inadequate. Our sanctuary is near 80% capacity for the single Sunday morning service we currently hold, our classroom space (recently maximized by removing closets and other expansions), remains insufficient for the number of children regularly attending, and our parking lot fills most Sundays. In addition, because of its age and its origins as bedrooms of a former residential home, our interior RE space is aesthetically unappealing.
- Our budget for advertising is limited, of necessity, and precludes most kinds of “paid” advertising.
- Our members are not uniformly confident about their ability to represent their religion to others, or, it would appear, to invite their friends and neighbors to services.
- We do not have an outside marketing strategy or team to implement one, and at least at the present time, may not have the financial resources to support a significant marketing push either.

Short Term/Long Term goals related to Marketing/PR that will benefit The Welcome Team

- Continue to explore creative means of marketing and promoting our church, our fellowship, and our programs to the community.
- Continue to emphasize and enhance our website. Investigate expanding our web presence through the use of links, web banners, etc.
- Explore alternative advertising outlets for increasing exposure in our

community. Based on historical feedback from our visitor logs, we attract few visitors through weekly advertising in the Post-Dispatch, so we discontinued this several years ago. Continued investigations of the visitor-promoting effects of direct mail, ads in other newspapers, the posting of flyers, sponsoring of events, etc., is encouraged.

- Look for appropriate public places where Emerson Chapel literature can be posted and/or maintained.
- Operate booths at and/or encourage participation in community events.
- Identify and sponsor public forums on issues that will be important to the UU demographic.
- Use our facility in ways that will support and attract like-minded community.
- Join with others in the wider St. Louis area UU network to more successfully “brand” Unitarian Universalism, so that it approaches the level of meaning that other major religions carry in the public consciousness.
- Strengthen our public witness on social justice issues that reflect our mission and vision so as to be a recognizable voice for progressive religion.
- Link Emerson to various websites pertaining to liberal religious thought – including Beliefnet.com

Visitor to Friendship

Welcoming, Mentoring, Assimilating

This is the phase in which people get to know UU and Emerson. We know that people will draw conclusions from our curb appeal, our parking lot, how well we upkeep our property and buildings, how welcoming our entranceways are, the first person/people they meet, our minister, the sermon, the music, our RE staff/teachers, and our religious education space. To a large extent, every person attending a service (or activity/forum) also has the ability to influence a visitor's impression of our community. Our job as a congregation is to make sure that visitors are able to get a complete picture of us in a relatively short amount of time, and come to know our mission/vision and values, so that their decision to return is informed and their memories of us are enduring.

Today's situation

Our congregation is friendly and inclusive by nature, and is receptive to contributions of newcomers. Our Minister is strongly attentive to welcoming, mentoring, and assimilating our newcomers. Our visitors generally report that they were greeted warmly and made to feel welcome and valued. We could probably do a better job of articulating our beliefs and operations, getting to know the visitors and their history and interests, and, early on, introducing them to others with whom they likely have something in common. Moreover, although we follow up by having the greeter send first-time visitors a handwritten note, and the minister does the same for returning visitors, improvements in connecting returning visitors with people and events that define Emerson Chapel Life, and in helping them match their talents and passions with appropriate teams and/or service opportunities, would likely make the visitor-to-friend, and visitor-to-member, transition more assured.

Doing the above consistently will ensure that we more effectively engage new people in fellowship should they commit to Emerson, and more effectively support them through their life with the church. It promises to give us better-informed, more connected Members.

Current activities of The Welcome Team that relate to “welcoming, mentoring, and assimilating” include the following:

- At least two greeters are available to welcome guests at the door as they enter our vestibule on Sunday mornings. Visitors get a warm and personal welcome, a nametag, a guest packet, and are asked to fill out a visitor sheet so we can follow up with them.
- Greeters engage newcomers with the goal of explaining how our Sunday morning schedule is organized, give or guide them to an order of service, and invite them to coffee hour and RE. If they are visiting with children, they are introduced to one of the Children's Chapel team members who help guide them to the appropriate R.E. class, introduce them to our DRE, etc.
- The liturgist reads a welcoming message that speaks to our diversity and

inclusiveness.

- The liturgist extends a special welcome to our visitors and invites them to join us for coffee, conversation, and RE offerings after the service.
- We distribute an order of service each week that communicates weekly events, Adult RE offerings, Children's RE activities by class, and identifies key participants involved in creating the overall service. The order of service lists key leaders and contact information as well as our seven principles.
- Guest packets for visitors include a selection of UUA pamphlets, our monthly newsletter, an RE prospectus, and other information for visitors. We intend to include an "Activity Guide" which describes Emerson's various teams and social groups once editing and updating of this document is completed.
- Our minister tries to personally greet each visitor on Sundays.
- Returning visitors are encouraged to sign up for a printed nametag.
- In sermons, our minister explains UU jargon and acronyms as she uses them.
- Visitors who provide their name and address in our visitor log receive our weekly "This Week At Emerson" email, as well as our monthly newsletters, a card expressing our pleasure at their visit, and a follow up letter from the minister if they return for a second visit. They remain on this list for several years, unless of course they write back and ask to be removed.
- We invite people who want to learn more about Unitarian Universalism and Emerson to attend our "Roots" newcomer orientation. These three-part sessions cover UU history, theology, and information on Emerson. They are held about four times per year. Regularly returning newcomers are invited by email to attend. Newcomers are encouraged to take these classes before becoming members. A Welcome Team member attends.
- For months when the Roots class isn't available, we offer an orientation session to answer basic questions and get to know the visitors better.
- As a policy and practice, we make our classes and gatherings open to visitors - the only exception being our covenant groups that close after their initial sessions.
- The Welcome Team hosts a Newcomer's Potluck dinner each spring, in which regularly returning and new-that-year members are invited by letter. After the meal, we hold a question-and-answer session facilitated by our minister.
- A detailed visitor log is kept to document visitor information, including contact information, past invites and attendance to Roots, our Potluck Dinner, and New Member Ceremonies, as well as how they found us and whether they receive our weekly e-updates and our monthly newsletters.

Challenges

While our intentions are good, we often don't have the time or person-power to greet and welcome newcomers as thoroughly as we could, nor connect with them again as well as we could when they return. There are several things we can identify that will help in this regard:

- Put in place a Succession Plan to ensure a well-organized and well-staffed Welcome Team that is always in the process of learning/training; this requires identifying new team members each year.

- The need for all (or most) of our members to be knowledgeable, intentional greeters and ambassadors.
- The need for a more flexible, accessible, and interactive member database
- Board Members, Team Leaders, and all members of The Welcome Team in particular, need to be more responsible for taking the initiative to introduce themselves to visitors, to answer their questions, and to help them make connections with others and with Emerson events/activities.
- Keeping members aware of the need, when speaking in groups, to avoid conversational shortcuts that exclude newcomers, such as using first names only when identifying key contact people, using acronyms that have no meaning to newcomers, or telling inside jokes and the like.
- Expand to three greeters each Sunday, not just for expected, high-attendance services and/or explore the possibility of using ushers to help guide visitors to the appropriate places.
- Greeters could be more intentional about also ‘greeting’ visitors after the service, but before they leave the building, to answer any questions they might have, thank them for coming, invite them to return again, etc.

Short term/Long term goals

Our goals going forward are to continue to make welcoming newcomers a priority, and expand and improve on the procedures we are currently using with apparent success.

- Develop and implement a Liaison program, which assigns a member to each interested newcomer to serve as a link between the newcomer and the many opportunities that our Fellowship can provide.
- To better communicate Fellowship activities, and continually identify ways to make them more inviting and accessible to newcomers.
- Increase newsletter articles designed to orient newcomers to the congregation, and the congregation to new members, and provide descriptions of ongoing programs and upcoming events.
- Add a newcomer page to the website with welcome-related information.
- Create more leaders who can do what the Minister now does in welcoming and serving as spokespeople for our church.
- Continue to improve our visitor/friend/member database and our use of it.
- Host newcomer social activities to better assimilate newcomers into the life of the church.
- Streamline our record keeping and communication process with the minister for 2nd time visitors.
- Insure that entire worship service (sermon and service elements) are friendly and accessible to visitors.
- Connect friends to the Emerson Facebook page and Staff Facebook pages.
- Update guest book with cell phone, home phone and email contact info.
- Insure Guest packets for visitors include a selection of UUA pamphlets, our monthly newsletter, an “Activity Guide”, an RE prospectus, a welcome letter from the minister, and perhaps a list of upcoming events.

Friendship to Membership

This transition addresses the needs at all stages of a person's journey with our Fellowship. It speaks to our organizational ability to learn, share, and effectively engage people's gifts and interests. It requires us to be open to accommodating new leadership and participation. It requires us to effectively communicate all that is going on in our church. It requires us to ask for people's contributions effectively, and receive them gratefully. It requires us to be effective at cycling leadership, and helping people rest and refresh when they need. It requires us to effectively train, coach, celebrate, reward, and, when necessary, redirect our talent.

Today's situation

For the most part, people feel welcomed, but past the initial welcome, we tend to lack consistent follow-up and integration. We are relatively successful at attracting and recruiting, but fall short at the testing period. This is the stage of the journey when a new member is asking the question: "Is this congregation really what it says it is? Do I belong here?"

Today, our newsletter, Sunday order of service, word of mouth, website, weekly email, newsletter and Facebook page provide information about the goings on in the Fellowship community. As the church leadership, we ask people to lead and serve when we have needs, and host monthly social events. But we don't target people for other activities in an organized way, based on their interests.

Current activities of The Welcome Team that relate to the "Friendship to Membership" transition include the following:

- Newcomers and evolving friends who begin to attend Emerson regularly and participate in some of its activities are asked, by letter, to consider membership. In that letter, we remind them of the possibility of formalizing their membership and participating in an upcoming 'New Member Sunday' (NMS) recognition during one of the Sunday morning services.
- Prior to signing the book and participating in the above NMS, interested friends are asked to meet with the minister and one or more members of the Welcome and Sustaining Teams for a brief 'membership intake' meeting. A "membership application packet" is often provided to these individuals prior to this intake meeting, wherein some information related to their passions, talents, and skill sets, as well as pledging, can be obtained on paper and returned to the minister and the Sustaining Team at the time of the meeting. At present, this packet specifically includes: A welcome letter from our minister, our Mission and Vision Statement, our by-laws regarding membership, a membership application, a care and concern survey, a financial pledge form and related paperwork (suggested fair share giving guide), and a form for submitting a biography of themselves for our newsletter. At the actual meeting, the contents of this packet are reviewed, the aspiring members are asked how Emerson is meeting their needs, what led them to return and aspire to membership, and what we could do

going forward to serve their needs even better.

- At the actual New Member Sunday service, new members participate in a covenanting ritual, receive the book “A Chosen Faith” by Buehrens and Church, and a New Member Packet that includes the following: A copy of our constitution and by-laws, a copy of our Mission and Vision Statement, the “We Are” Unitarian Universalist brochure, a copy of our membership directory, and a hand-written note from Krista.

Challenges

- Improve the consistency of printing newsletter biographies on all new members.
- Obtain effective surveys of new members with respect to what they want to offer our fellowship and the community.
- Keeping aforementioned passion/skill list current, and identify how best to share that information.
- Keeping track of what we’ve asked people to do, so we don’t overburden individuals.
- Following up with friends after they’ve given their interests so they can be invited to participate in things they are passionate about.
- Saying no to initiatives for which we lack fresh, eager resources.
- Having an effective, useful child-care policy and program.
- Having an effective method of tracking member (and friend) Sunday morning attendance and following up with personal contacts for members whose attendance has become infrequent or lapsed.
- Inadequate facilities for some programs.

Short term/Long term goals

- Develop a feedback mechanism for members. Host a semi-annual forum to solicit feedback on Fellowship functions and our shared ministry.
- Develop a feedback mechanism for new friends to ask them how Emerson can better meet their needs (direct feedback).
- Conduct exit interviews with resigning members to improve member retention.
- Develop more special interest groups.
- Encourage the development of continuing education classes on topics of interest to the congregation.
- Reestablish New Member bulletin board with photos and profiles.
- Create membership directory with names and information for each family to be viewable at Emerson and possibly on the website (password-protected).
- Encourage more participation in regional and national denominational affairs.
- Consolidate and focus the way we ask people to volunteer.
- Improve our database of people’s profiles, talents, and interests, as well as current and past assignments.

Deepening Membership

Nurturing, Growing, Belonging

This is the “permanent” phase of life in the Fellowship in which we plan to meet the ongoing needs of members for nurture, growth, and belonging. We measure ourselves by our ability to keep our members committed and engaged, and by our ability to support and nurture them through joy and sorrow, sickness and health, good times and bad. We note that this phase depends on factors outside the work of the Sustaining Team.

It relies, in part, on good sermons, good pastoral care, good friends and intentional connections, good Religious Education for all ages, good behavior by other members, an institutional ability to solve problems in the open, and the daily renewal of our commitment to serve with love and tolerance.

Today’s situation

- Sunday mornings are well organized for worship and our services are diverse and strong.
- A member of Sustaining attends the new member intake meeting to help the new member make connections and discover their sharable interests.
- We have a great music program, with a great pianist, several choirs, a talented worship band which invites many members to participate, and a strong collection of internal musicians who enjoy performing such that special music is available almost every Sunday.
- Our minister is caring, involved, and available. Her sermons are well received and thought-provoking.
- Excellent group of internal speakers from the congregation are able to deliver diverse viewpoints and meaningful messages during non-minister Sundays.
- A strong worship team is in place to ensure high quality services every Sunday.
- We strive to address congregational conflicts directly.
- We have an active pastoral care team that helps to meet the emotional needs of members in crisis.
- We have a number of special interest groups, including social groups, covenant groups, and recurring social events.
- A diverse youth R.E. program and youth summer activities.
- Welcoming Congregation status.

Challenges

Few things are more complex than satisfying a growing and diverse group. People align with a church for a myriad of reasons that at times can even seem mutually exclusive. The services we want to provide to our members will always be more than our human resources will cover. We are a church in transition from pastoral to program, and no longer is it possible for everyone to know everyone else. Now we have to develop

institutional skills of asking, listening, and adapting.

Currently, we lack:

- Family-oriented programs
- Internal church programs for sexual minorities
- Singles community programs
- Couples-orientated programs

Short term/Long term goals

- Better manage our congregational talent and interest lists for the purposes of connecting the right people to the right needs of the church.
- Identify members at risk of leaving the congregation and find ways to re-engage back into life at Emerson.
- Increase social events for all ages, and target events for particular demographics, such as seniors, singles, LGBTQ, etc.
- Sponsor 'membership appreciation' social events
- Partner with the Adult Religious Education Team to intentionally expand religious education offerings aimed at deepening our spirituality and commitment to Unitarian Universalism.
- Increase more Fellowship-sponsored social action in the community. This will build community among members as well as increase our exposure in a positive way.
- Create small volunteer opportunities for new members to feel included.

Community Outreach Program

Description

Once the Sustaining Membership team is solidly in place and functioning, serious consideration should turn toward creating programs that support the community in which Emerson resides. Our church should offer outreach programs that are educational and/or supportive in nature and structured in such a way as to attract non-members to our facilities. A new 'Community Outreach Team' would be created expressly for leading and facilitating these efforts.

Today's situation

- As stated earlier within this document, Emerson attracts visitors primarily through our website.
- Our current physical facilities are not placed optimally in order to attract large numbers of curious passersby.
- Our current facilities do not lend themselves to building rental; however, our Hearth Room and Vestibule are suitable for intimate gatherings intent on learning or fellowship.
- Our church membership could benefit greatly by offering low-cost or free workshops, seminars, and/or educational classes to the whole St. Louis West County area regardless of religious background.

Challenges

- Parking would be the main concern for such venues; however, as long as the program's focus is on substance and learning and geared towards small, intimate groups, the impact of our relatively limited parking should be minimal.
- Advertising would need to be researched and maintained. The new team would need to use free online sources to get the word out, as well as limited paid advertising in local papers and possibly radio.
- Identifying leaders and/or teachers to facilitate each program may be a challenge; however, if the membership embraces this opportunity, there are many talents within our church community that lend themselves nicely for this type of effort.
- Creating a program curriculum will also be the challenge of the new team. Each church member or friend brings to Emerson one or more unique talents that, when offered to our community at large, might attract new visitors. Suggestions for programs include (but are not limited to):
 - Community Choir
 - Divorce Workshop
 - Relationship Workshop
 - Writing Group

- Fly-tying classes
- Arts & Crafts Hour
- Knitting/Crocheting course
- Beer/Wine Tasting
- BBQ classes
- Horticulture seminars
- History Discussions
- LGBTQ issues
- Dog Training
- We should recognize that, while some members may have a talent or interest that they want to share, not all will have the presentations skills or time to prepare formulized instructional plans. Thus, inviting outside experts to our facilities to give lectures or demonstrations, book reviews, etc., would be another excellent way of providing valuable community outreach programs with minimal effort on the part of our membership.

Short term/Long term goals

- Short Term Goals for Community Outreach Team:
 - Design a program architecture in which programs are to be delivered. For example, courses could be provided on a semester-type schedule, on a reoccurring schedule, once-in-a-while, yearly, etc.
 - Identify members that are willing to provide a program, and create curriculums and schedules for these programs that do not interfere with currently-scheduled church activities. This schedule should cover at least six months in advance – optimally a year in advance. Such planning would provide adequate opportunities for advertisement as well as set an expectation of permanency within our community.
 - Identify external groups that might want to hold their programs at our church, and include these within the curriculum.
 - Identify and implement advertising strategies for these programs.
- Long Term Goals for Community Outreach Team:
 - Maintain the best of the programs, and retire programs which are not attracting enough participation.
 - Continue to improve program content and delivery.
 - Continue fine-tuning of our advertisement strategies.
 - If new facilities are planned, appropriate space needs for these programs should be accommodated for, and possibly increased if so desired.

Summary

We believe we have many elements in place that support our continued growth. We are passionate about our Fellowship community and confident that we will find ways to sustain it. The population growth and turnover in our area and in the larger West St. Louis County and neighboring St Charles County puts us in touch with a diverse range of people. We are in a unique position to provide spiritual and personal growth for those seeking a liberal religion. The key to our future is an active and involved membership.