

**Humboldt Unitarian Universalist Fellowship**

**FUTURE FORUM REPORT**

**Exploring the Preferences of HUUF  
Members and Friends**

**Presented to the Fellowship Board and Members  
October 4, 2009**

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## Future Forum Report: 2009

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### **Introduction:**

Starting in 1953, at the founding of the Humboldt Unitarian Universalist Fellowship, our members have met to plan each stage of our development. We have completed every endeavor we undertook - together. Every time the latest goals were reached, we embarked on a new exploration of what we wanted to do next.

And so, in June of 2008, it became evident that our Congregation was at a new juncture. We had completed construction of the new RE building and were coming to the end of our commitment to trying out professional ministry.

We were also clearly in a generational change in leadership and a diversification of membership.

We began a process of finding out what our priorities were now and for the next five years focusing on four areas: ministry, programs, facilities, and our place in the community. At the same time we wanted to determine what commitments could be made in time, effort, and funding to see if we would be able to fulfill those desires.

### **Process:**

The Board established guidelines and the charge to the committee who were to take on creating the survey, forum, and follow-up contacts to gather the information from our members. The Board recruited four members who had been involved in past planning to form a Future Planning Committee. Lead by Maureen Lawlor, Co-President, the committee members were: Scott Allen, JoAnn Thomas, Barbara Madaras, and Connie Roser-Renouf.

The Board took on preparing the Congregation for the process through Sunday programs and a series of articles and special invitations, while the Committee developed the survey and did all the preparations for the Future Forum, which was held January 10, 2009. Forty-eight people filled out their surveys and participated in small group discussions that day.

From February through April every member and pledging friend who did not participate in the Forum was invited to small group gatherings or one-on-one opportunities for completing the surveys and providing additional comments. If people preferred to fill them out by themselves they were sent a survey.

Out of our membership of 160, we received 103 completed questionnaire surveys. The data from the questionnaires and all the comments put on them and collected from discussions were also collected and put into an excel document from which Connie Roser-Renouf produced bar graphs illustrating the results. These results were presented to the members at the June 7<sup>th</sup> Congregational Meeting.

The Board reviewed the results at their retreat in June and agreed to form an Ad Hoc Committee to analyze the data. The mission of the Ad Hoc group was to create a document that presented what could and could not be discerned about what the Congregation wanted and was willing to do. They then would help the Board develop plans to implement what could

be acted upon; and, a process for looking deeper in areas where it wasn't clear what actions to take.

An invitation was sent by Newsletter and email inviting people to join the Ad Hoc Committee. Then several additional people were recruited to make sure the expertise most appropriate to the task was on hand. The committee members were Bonnie MacGregor, Richard Kossow, Marianne Pennekamp, Jack Munsee, Barbara Maderas, Julie Neander, and Denise Foley. Connie Roser-Renouf provided ongoing data and support to insure the data was most accurately interpreted and presented.

Three members of the ad hoc committee each took a section of the main survey instrument. They carefully considered the tabulated responses as well as written free-form comments to arrive at an interpretation of "what the congregation said as a whole" in the various areas considered. The following report is the weaving of the interpretation and graphs.

**Since there were 103 total respondents to the survey, raw numbers are very close to percent numbers. For example, the statement that "75 agree" can be interpreted as "75% agree" with very small error.**

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## **Survey Data, Interpretation, and Recommendations**

### **Section One: Ministry**

This section addresses the topics of a professional minister and financing that ministry.

#### **Part 1. Professional Minister**

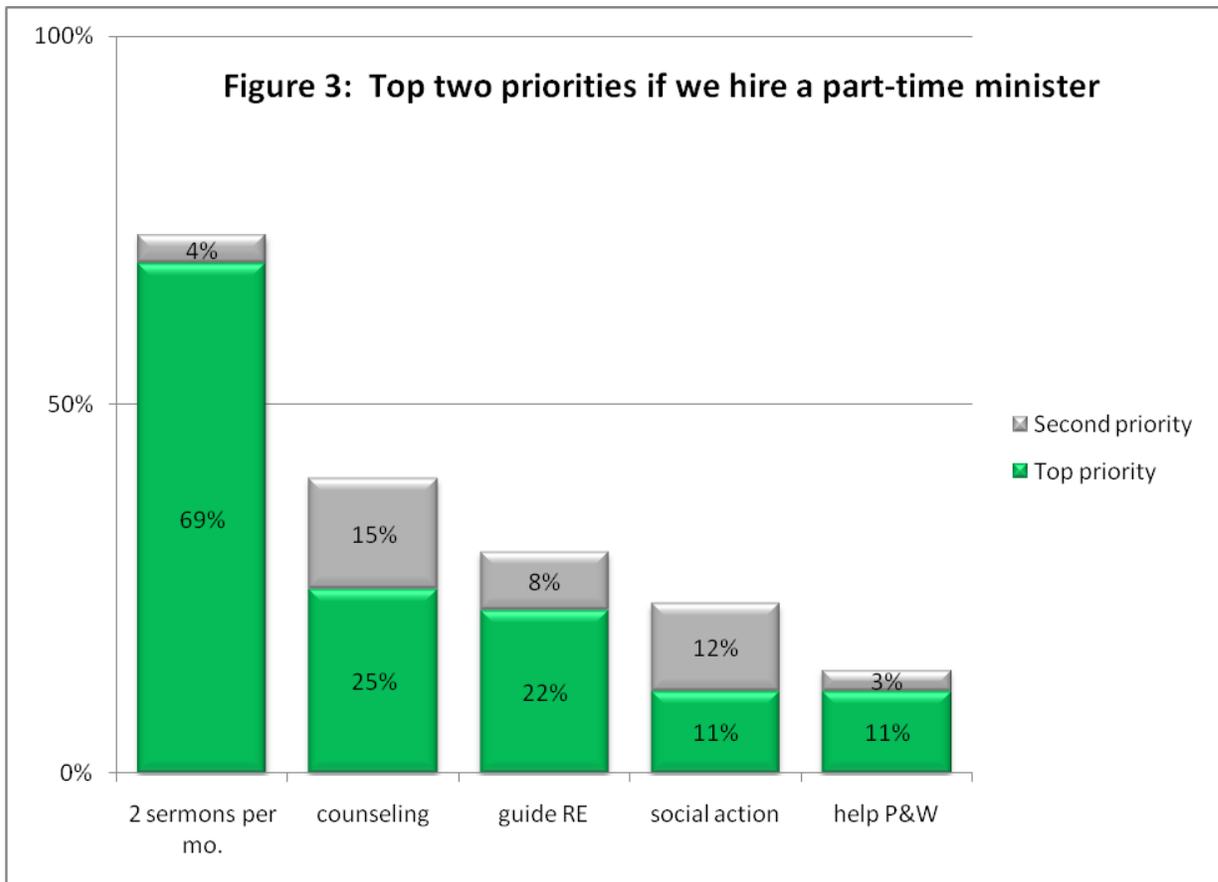
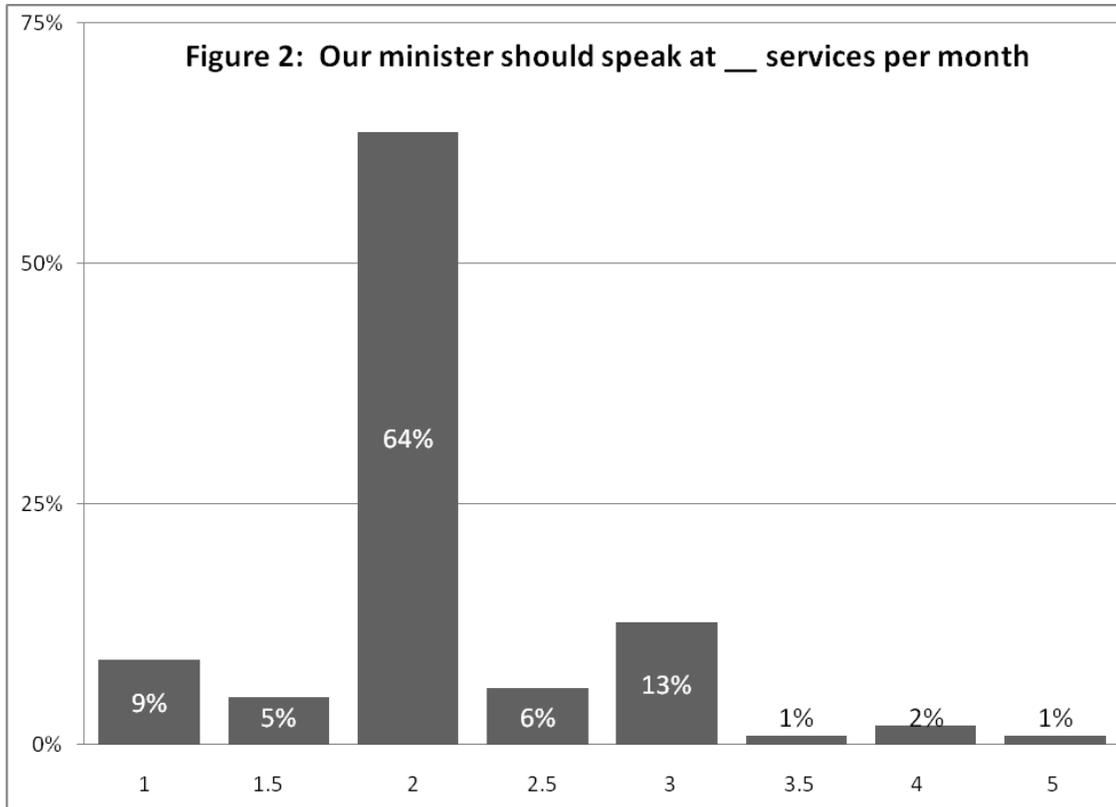
**The main message of the congregation's responses to having a minister is that almost all of us want to employ a professional minister.** 74 would like a minister to lead us in the community to share our covenant (mission) and feel that such ministerial involvement would help attract new members. 55 feel this community involvement would also re-vitalize the existing membership, but 38 had no opinion on this. Very few of us feel that having a minister at the core of the congregation is essential to attracting new people.

About half of us are content with a part time minister, but 43 are not. Two-thirds feel two sermons a month is ideal. And 73 feel that these two sermons are either the 1<sup>st</sup> or 2<sup>nd</sup> priority for any minister.

Other than bringing our covenant to the community, attracting new members and preaching at least twice a month, we are conflicted about what kind of service we want from a minister.

- 59 favor more time in pastoral care with our ill and elderly members.
- 47 favor more time for personal counseling, 43 are neutral and 10% opposed.
- 47 would like a minister to "participate " in committee work. Answers to another question indicated a high percentage would welcome ministerial encouragement to committee membership, but not to do actual committee work.
- 41 think a minister should be "involved" in all major decisions, and 39 think not.





## Part 2: Financing Ministry.

When we were asked to rank-order four means of increasing revenue to pay for a professional minister, the preferences were very evenly spread among: 1. increased pledges, 2. increased fund-raising activities and 3. membership growth. The least favorite choice was to decrease current expenditures.

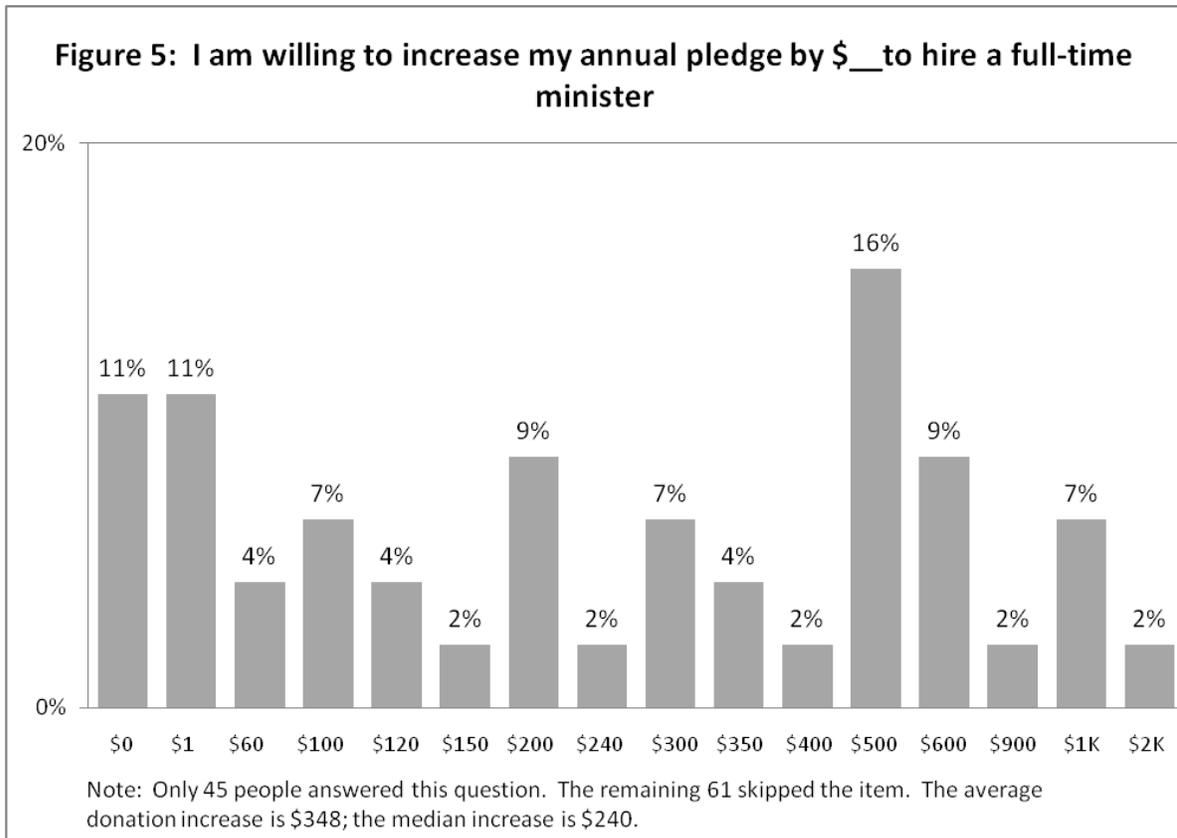
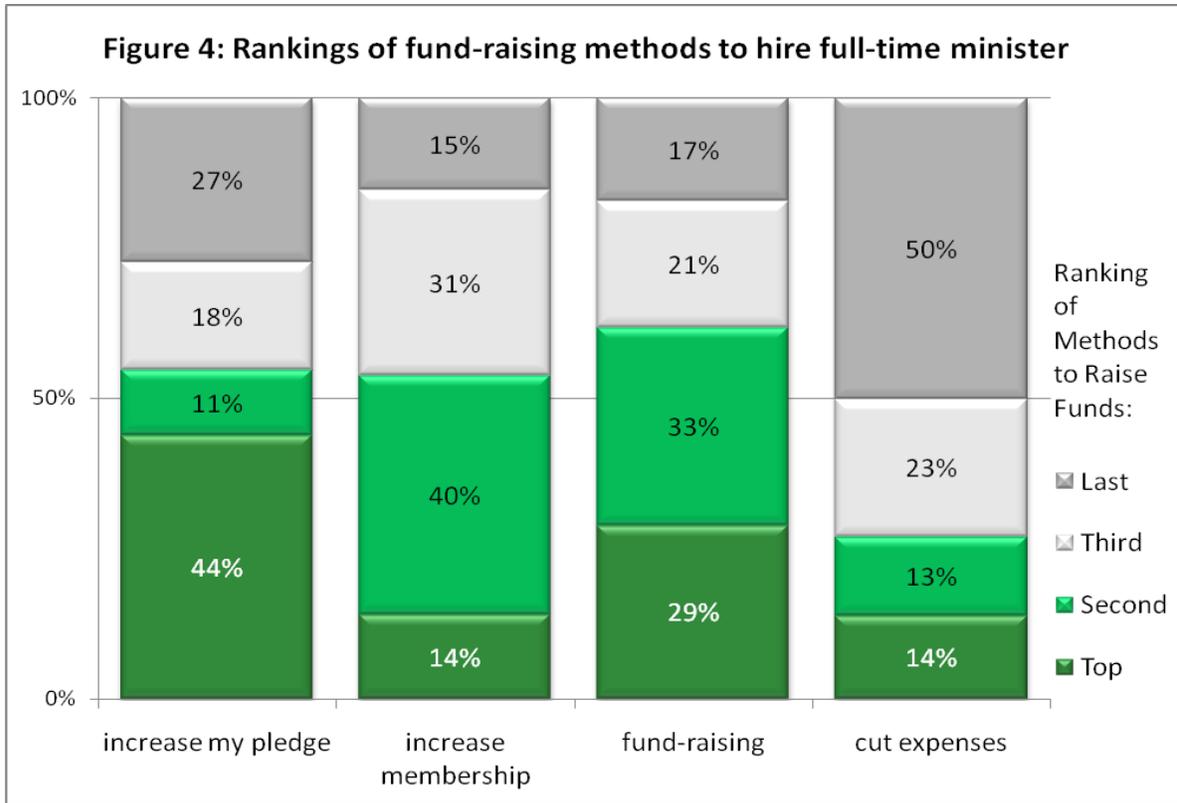
- 44 think increased pledging is the best way to finance ministry but 62 of us are not able or willing to increase our pledges, or just don't want to commit to an amount.
- Just 38 promised specific increases totaling \$15,655.

*Note: A half-time minister will require an additional \$21,00/year in salary and benefits; a full-time minister, \$56,000/year more.*

Questions as to the feasibility of *other* financial avenues to raise revenue to secure ministerial services:

- 40 want to increase pledge income through aggressive membership growth, and
- a goodly number (62) would rely on fund-raising events, noting that while fundraising may not be sufficient to depend on for program funding, it is an important community building effort.
- 47 chose cutting expenditures, but only as their third or fourth choice.

The seeming paradox of a congregation wanting professional ministry, but without a unified understanding of how to pay for it presents the clearest avenue for future efforts. **We must focus on studying our congregation's money raising behavior and potential; then devise strategies to bridge the paradox. The Futures Forum Survey data would seem to make such an effort the first priority.** There is a wealth of literature on congregational financial issues. Our denomination offers generally, and specifically by Cilla Rawley, Pacific Central District (PCD) executive, extensive experience with other congregations to help us examine our situation and devise means to make us financially able to seek professional ministerial leadership.



## Section Two: Community Strengthening Commitment

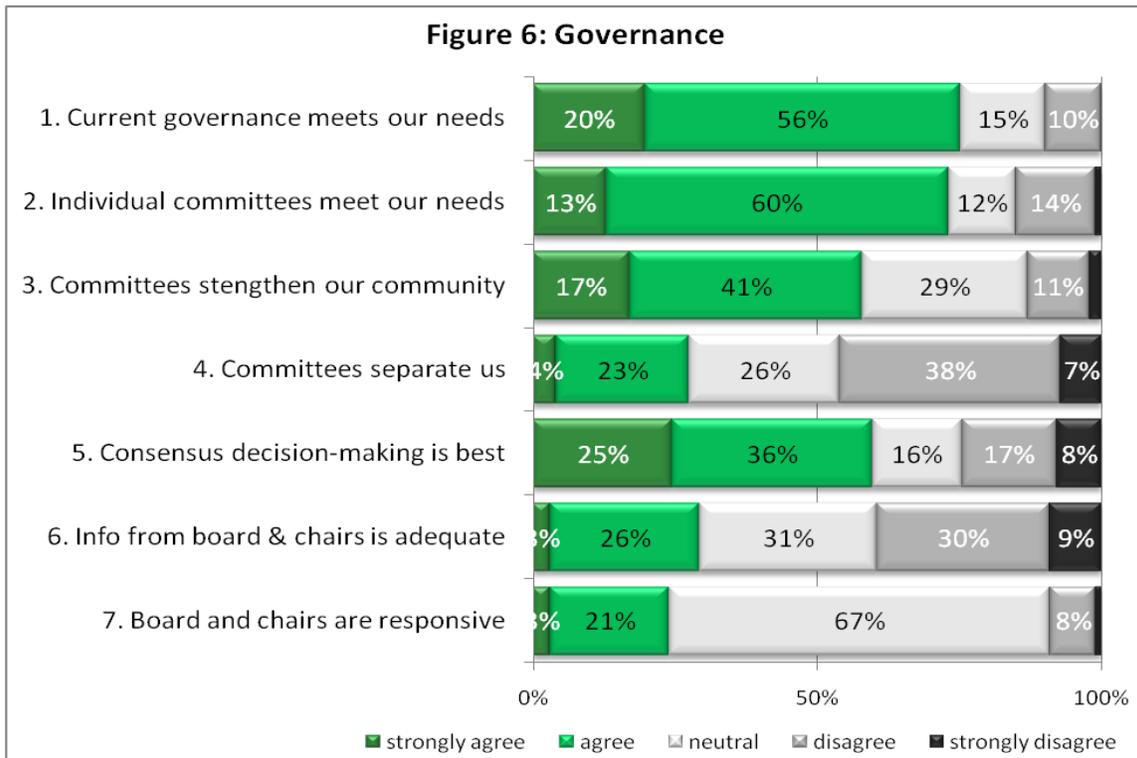
This section covers the topics of Governance, Participation, and Communications

### Part 1: Governance

Governance is defined as follows in this survey: Our Community has a congregational form of governance, giving the final authority to its members. The Board of Trustees and Committees are empowered by the Congregation to make necessary decisions to accomplish our congregational vision and to keep our Fellowship vital and running smoothly.

7 questions address this topic.

- 76 of us agree that the current governance meets our congregational needs.
- 73 agree that our Committees meet our needs while 27 feel that our committees separate us. This issue of being separated by our committee structure was also noted in several member comments and at one of the discussion tables.
- Decision making by consensus was endorsed by 61, with 16 neutral and 25 not in agreement. Consensus decision-making was also brought up, pro and con, at the discussion tables and in some individual statements. **Better training in the consensus process was advocated for the membership and better leadership training in leading and implementing the process was also advocated.**
- “Information from Board and Committees is adequate for me” was agreed to by 39, while 29 disagreed and 31 were neutral.
- Board and Committee Chairs' responsiveness to member issues was rated as neutral by 67, versus 9 positive and 24 negative responses. These two questions appear to need further attention.



## Part 2: Participation

Nine questions address this topic. They focus on the degree of participation by members and friends in the life and work of the Fellowship. **We seem to clearly want as many members as possible to participate in creating and maintaining our community and structures, and we want help to do that so we can participate as we feel we are able without pressure to do more than we feel we can.**

- 31 of us agree that not all of us need to participate actively. However, 57 disagree and 89 of us worry that the nonparticipation of some will lead to burnout for others.
- 51 believe that all need to participate to have a healthy Fellowship for all, while 34 disagree and 16 are neutral. Overall,
- 49 believe that participation by all maintains a high functioning community.
- Re Building and Grounds maintenance, total participation seems essential to 40, while 22 are neutral and 38 disagree.

Looking at these participation questions and answers, what appears to be missing is a definition of all the potential aspects of participation in our community. \*

A number of survey answers highlight how **informal networking first attracts and then involves newcomers and more recent members; and how the absence of such informal connecting makes it harder to feel a sense of belonging at the Fellowship.**

For some, the expectation that everyone should participate equally creates a sense of being pressured, which may turn them away. The message seems to be that every person/family may be best able to define how much participation is possible and right for them, and this is apt to change over time, as circumstances change.

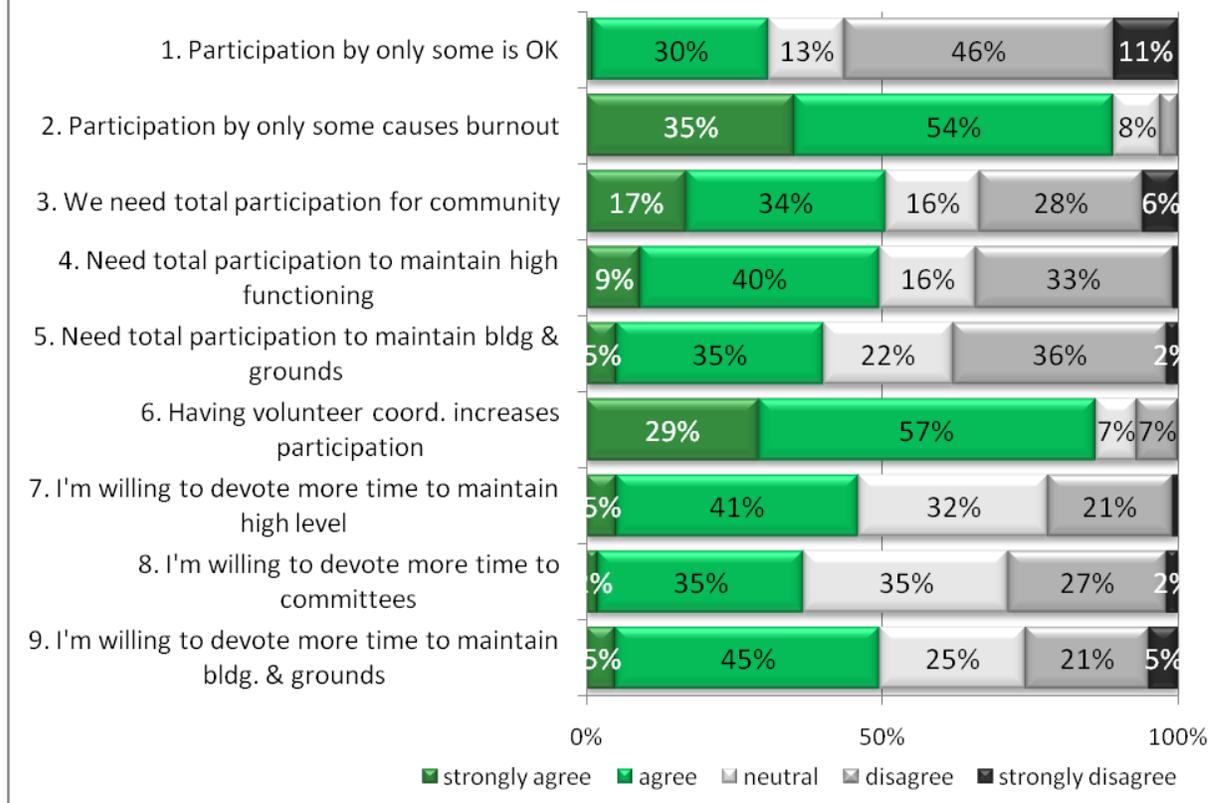
- **Eighty-six of us believe that a Volunteer Coordinator would improve participation**, with only 7 of us neutral, and 7 disagreeing.

Three questions follow up and ask if we are willing to devote more of our time to the Fellowship:

- 46 say yes, 32 are neutral and 22 say no.
- When asked about Committee participation, 37 say yes, 35 are neutral and 29 say no.
- When asked the same question about more time for buildings and grounds maintenance, 50 said yes, 25 are neutral and 26 say no.

\* Board and Committees, Fiscal and Fundraising, Building and Grounds, working in and sustaining RE and the Teen experience, as well as the formal and informal participation in the kitchen, the greeting, the Caring committees, outreach to newcomers, and the many other informal supports members provide to each other, etc.

**Figure 7: Participation**



### Part 3: Communication

Our diversity of comfort levels with email and internet (not even considering texting and twittering); as well as our unique lifestyles and personalities makes communication complex.

**Note: While the newsletter is seen as the primary vehicle of communication the survey was conducted before the newsletter went on-line.**

Fourteen questions survey members' satisfaction with and preferences for communications within the Fellowship.

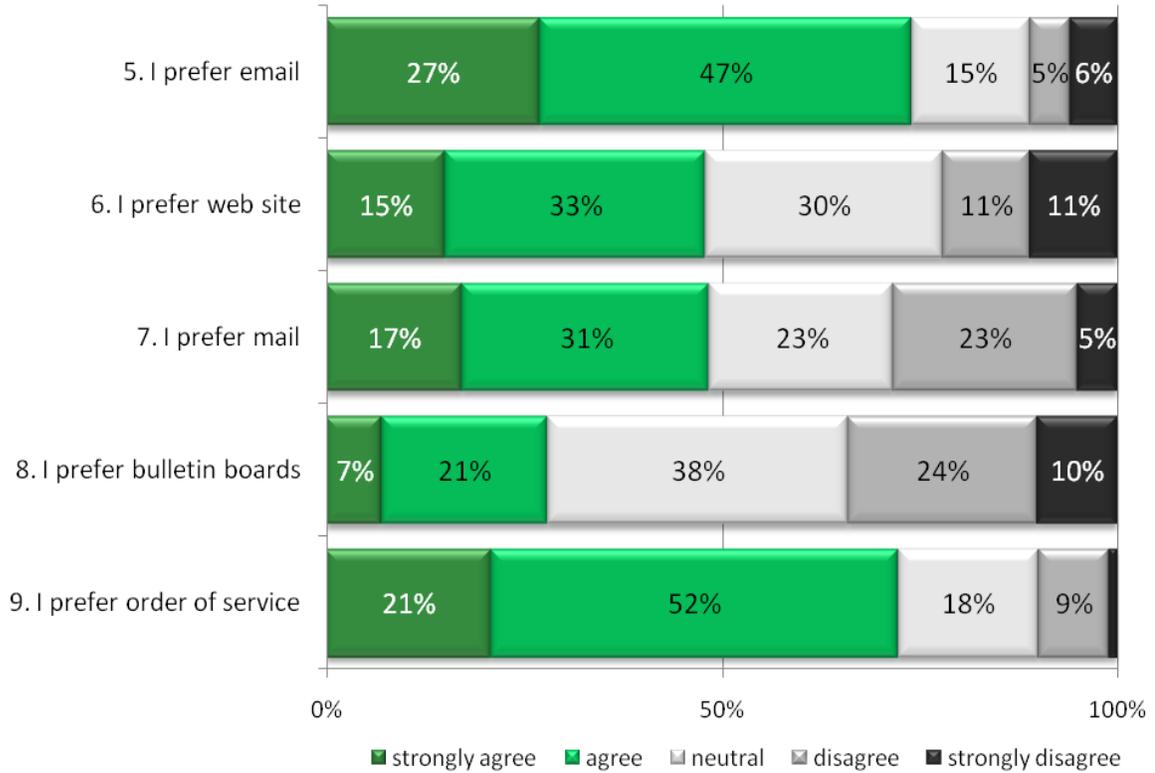
- 43 of us feel that current methods of communication are adequate, while 37 do not.
- 76 feel that increased communications would strengthen the community, while 24 do not.
- The HUUF Newsletter is seen as the key source of information/communication by 90 of us.
- The HUUF Web page is seen as excellent by 36 while 46 are neutral and 17 disagree.

These findings are amplified as follows:

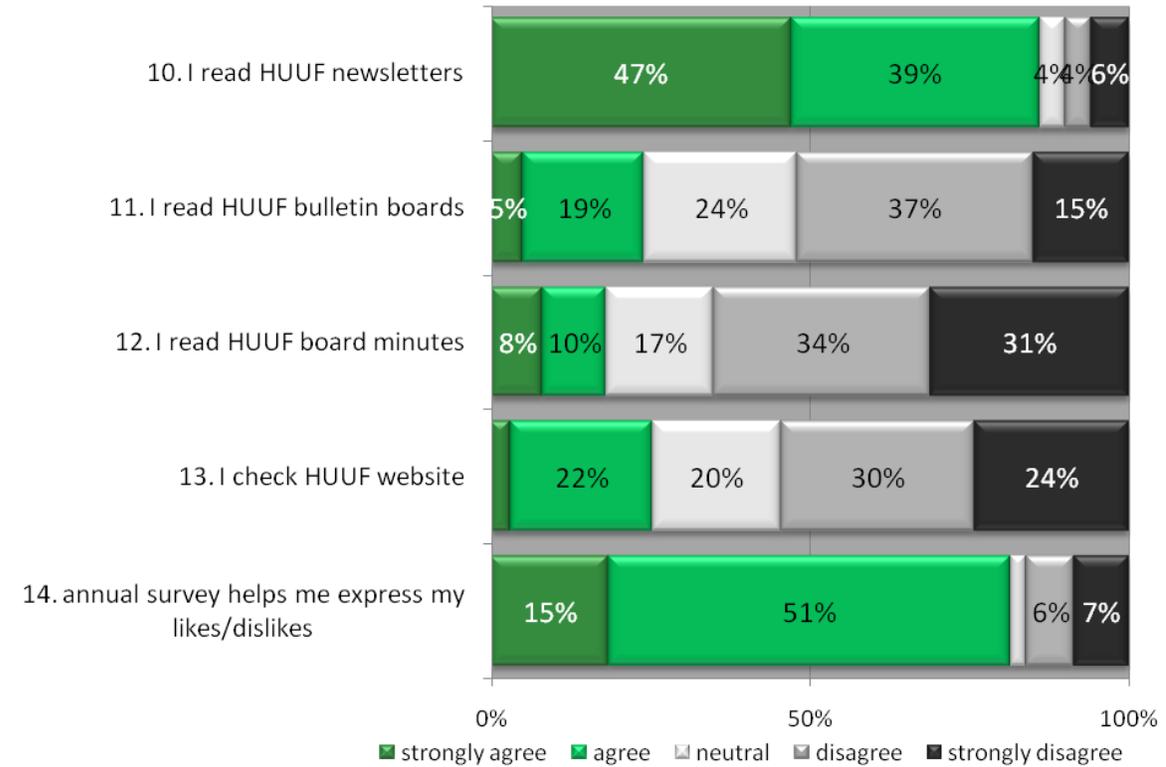
- 74 of us prefer contact by email.
- 48 prefer the web.
- 48 prefer regular mail, with 23 neutral and 28 disagreeing.
- 28 prefer Bulletin Boards, with 38 neutral and 28 disagreeing



**Figure 9: Preferred form of communication**



**Figure 10: Use of communication channels**



## **Underlying themes about Communication and Participation:**

We might ask what communication tools best meet the needs of both the Fellowship organization as well as individual members. Similarly, what could newcomers/visitors tell us about how they felt (welcomed or ignored), and what would they recommend to us

Our Fellowship represents a complex social network and getting connected personally is not immediately obvious, nor could it be. Obtaining newcomers' feedback and input into next steps could perhaps best approach this issue. Meeting informal social needs may be as important as formal participation in the Fellowship. Nor is it an either/or, according to a number of written comments.

Finally, an undercurrent seems to exist among a number of those surveyed who feel that their participation, either fiscally or through volunteer activities and participation in governance or committee work depends on what their lives are like and how much energy they have for the Fellowship. This is a matter that changes from time to time as life changes. Several indicate that they feel pressured, and when they do, they distance themselves. So it seems to be a matter of wishing that we, as a community, be sensitive to the contexts of our members' lives and act accordingly. **The desire seems to be to find a balance between what members give to and what they receive from the Fellowship. Assessing that balance is both an individual and an organizational ongoing process.**

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## **Section 3 Growth vs. Status Quo**

This section covers the topics Fellowship size and structure, financing and fundraising, organizational structures; and, administration and staffing.

### **Fellowship Size and Structure**

Five questions specifically addressed this topic, with two additional open-ended questions.

There was mild overall disagreement that we are "just the right size". **We seem to want more members, and we clearly want strengthened commitment and don't seem to think we need to change our structure. Significantly, on average, one third of us don't seem to know enough to have an opinion on these topics** suggesting that newer members need more information about our systems, leaders, and finances.

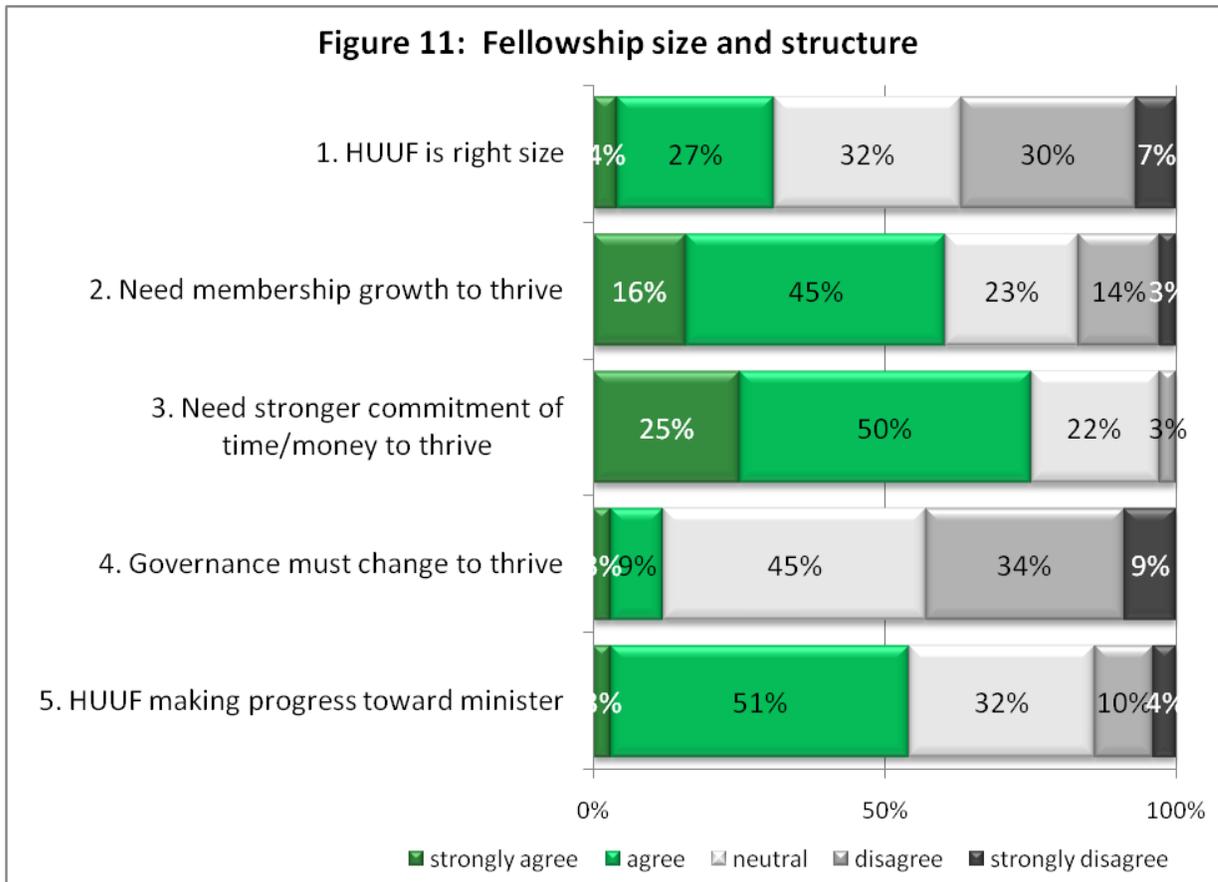
Specific suggestions were lacking in this section, but other sections also indicate that we want to be more visible in our community and that a minister might aid in community growth.

- 61 feel we need to grow membership to thrive, with only 17 disagreeing.
- 75 indicate we should strengthen the commitment of current members in time and money. Only 3 disagree.

There was only question directly related to "structure" and 43 disagreed that structure must change; and, even more (45) were neutral.

Since there was no explanation of what a change in structure might entail, nor any explanation of possible benefits or costs accruing to such a change, this question does not give us any direction. However, there were individual comments including: “we should have a less convoluted decision-making process”; and, “the current committee set-up should be reworked”.

- There were a 59 responses agreeing that we are making progress from a lay to minister served congregation, although “progress” was not defined.



### Fundraising Tools

There were three questions regarding this topic. Fewer than 25 feel our fundraising events and canvass techniques work well; while 67 believe our capital campaigns do work well. Over a third of us are “neutral” on all these questions. So, **apparently, we’d like more money, but we don’t seem to agree on how to obtain it nor seem to know enough to figure it out.**

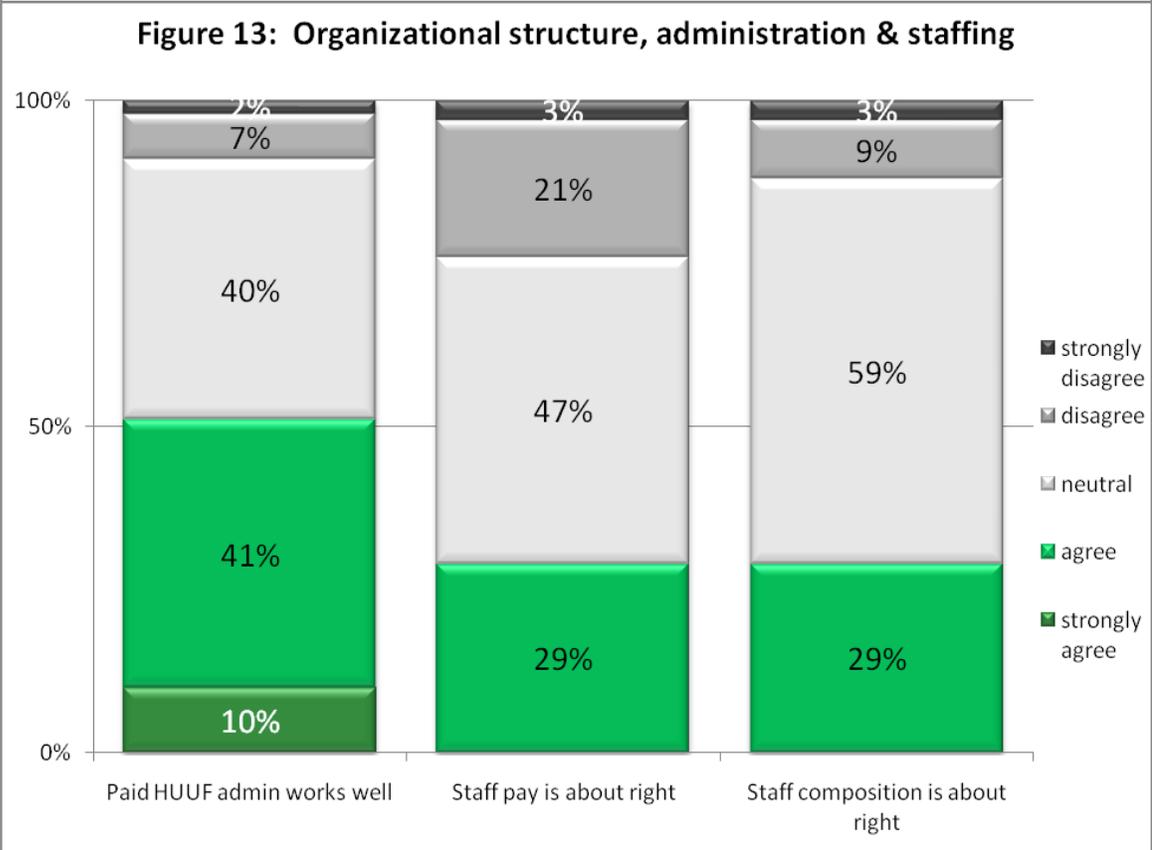
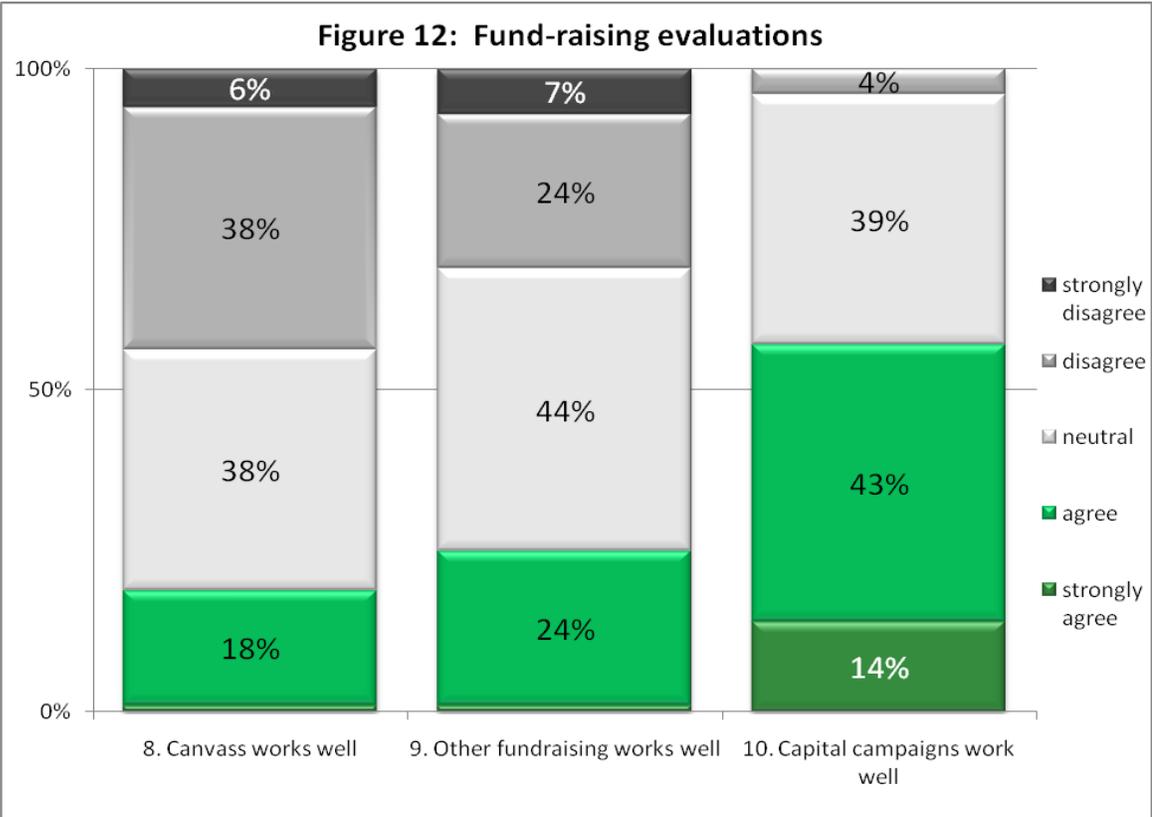
There were write-in suggestions including “NO fundraising”, “Increase pledging – no fundraising”, “Return survey and canvass to a personal process”, Have an “active fundraising committee”, “Increase revenue from building use”, “We need an adequate budget”, and “More money is needed to solve our problems”.

## **Structure and Staffing**

Again, there were just three questions regarding this topic. Among those with an opinion, we seem to agree that the current paid administration works very well, but there was no clear direction in answers about current composition of staffing or compensation practice. This time over 50% responded as “neutral”.

A few respondents suggested additions to staff, including a youth minister, gardener, custodian, and more admin and bookkeeping help.

This whole section had far too many “neutral” responses to provide any direction. That some questions were too vague contributed; however, it seems that many people either don’t feel they have enough information to contribute their opinion, or haven’t thought about / paid attention to the workings of the Fellowship to venture an opinion. This is clearly a situation that needs to be addressed before we can proceed with effective fundraising and involvement; and one that would indicate that assistance from PCD might be helpful.



## Section 4 Programs, Maintenance, and Place in the Wider Community

This section covers the topics of “Conflict Management”, “Sunday Services and Other Rituals”, “Connection with the Larger UU Community”, “HUUF in Our Community”, “Religious Education”, “Campus/Youth Programming”, and “Maintenance”.

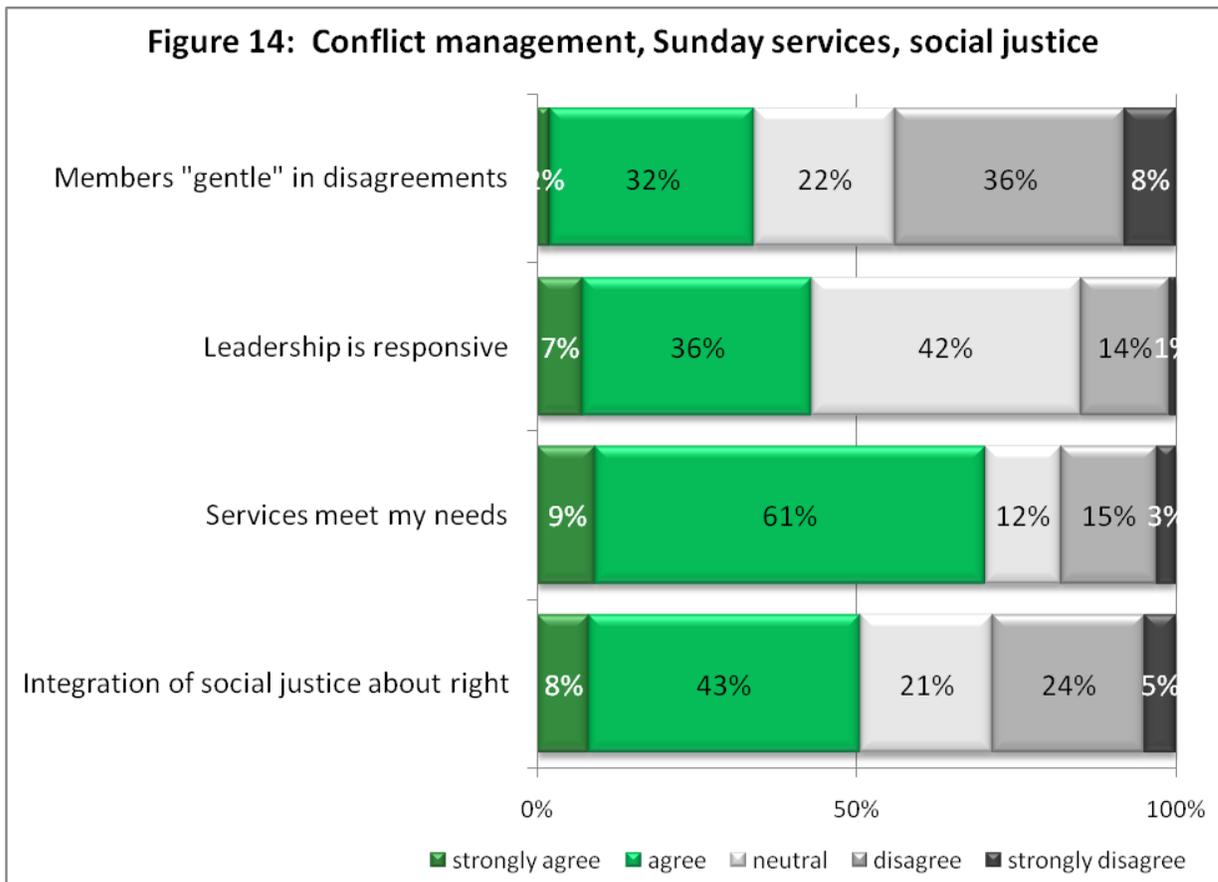
### Conflict Management (2 questions)

There was some disagreement with the statement that we are always gentle in disagreement, but a more agreed that our leadership is responsive to resolving conflicts.

### Sunday Services and Other Rituals (2 questions)

A majority (70) agrees that our services meet their needs. Over half agree that the social justice content is right; but a 29 disagree. One comment asked for more intellectual content in Sunday services and one for more spiritual content in sermons. Two comments asked for verbal announcements during the services.

Historically we seek a balance in our services between spiritual, intellectual, and social justice. It is not surprising to find, therefore, that there is not full accord on this, but it reminds us to continue to be attentive to the diversity of needs and desires amongst us.



### **Connection with the larger UU Community**

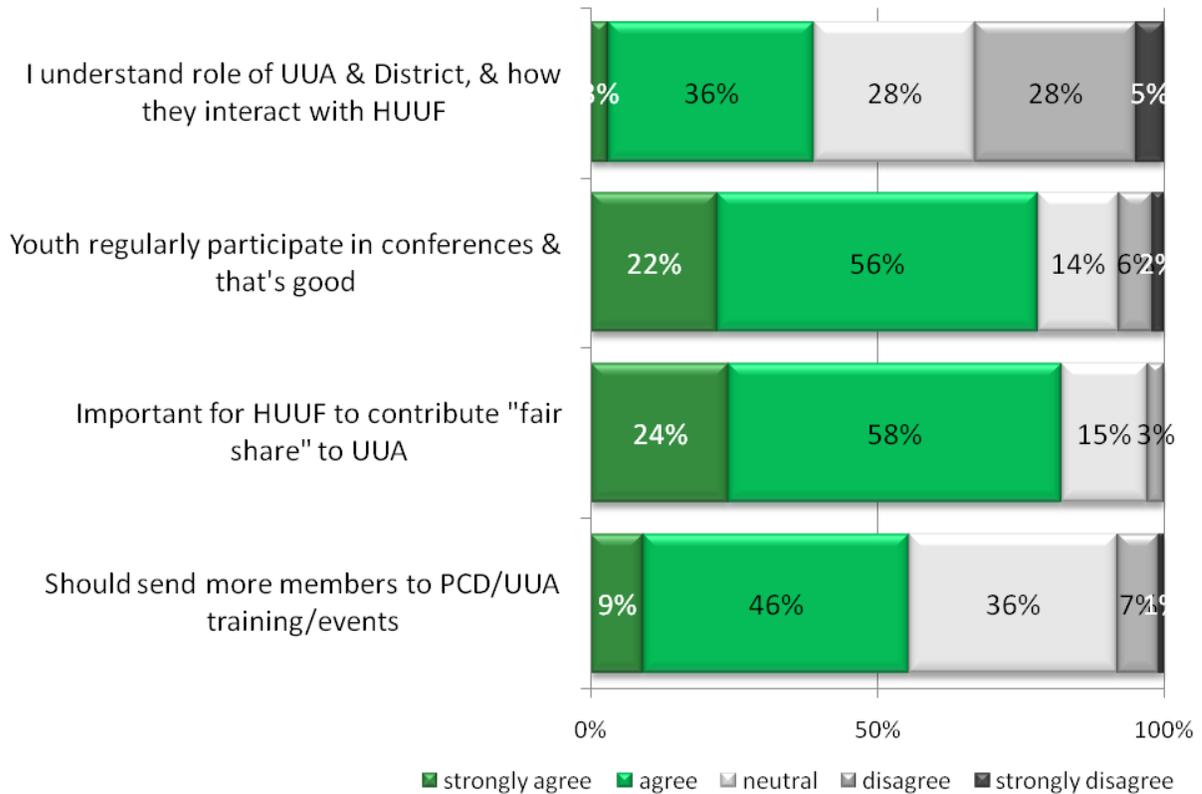
Although only a small majority of respondents agreed that they understand the role of the District and UUA. A large majority agreed that we should continue paying our fair share to UUA, and that youth attendance at conferences is a plus. For those who had an opinion, 55 agree that we should send more folks to PCD/UUA training.

This section elicited a stronger interest and agreement than many and seems to indicate that more of us want a connection to the larger UU community. This is somewhat of a new trend.

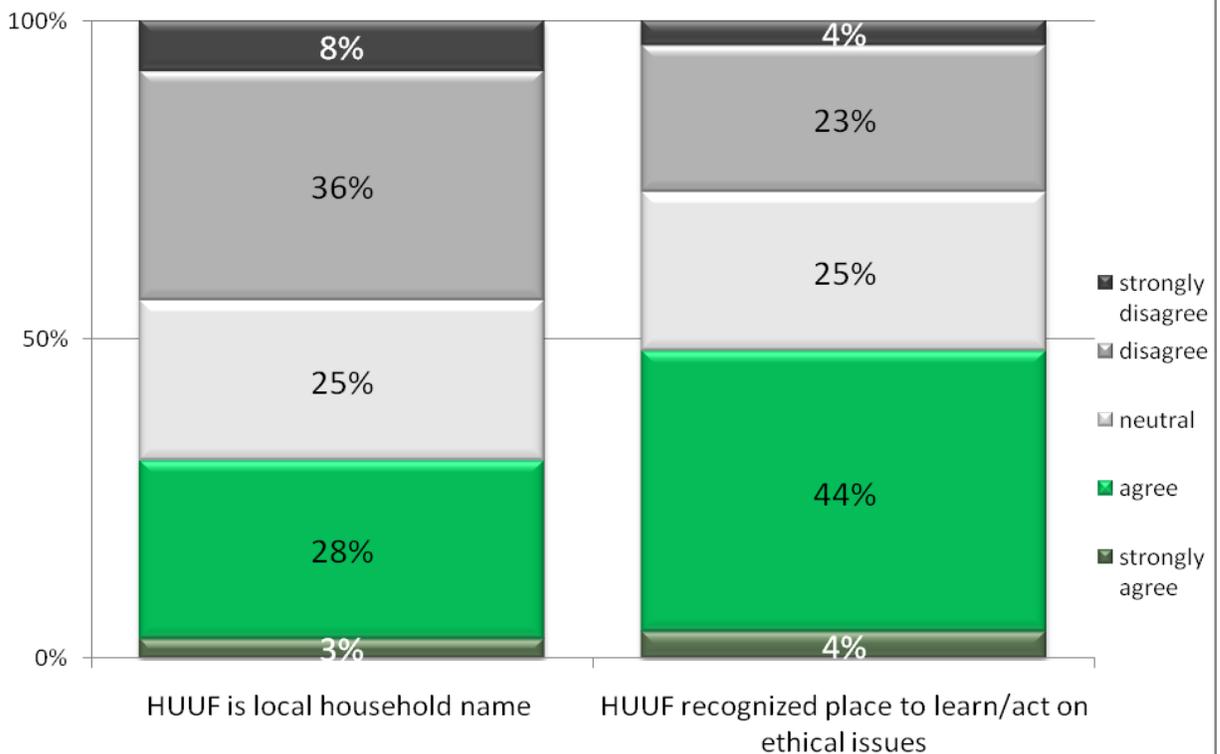
### **HUUF in our Community**

Given that we have no independent information to determine if HUUF is either a household name or recognized as a place to learn/act on ethical issues it is not surprising that we did not have agreement on these questions. We seemed more confident of the latter with almost half in agreement. One comment suggested that we need a PR person.

**Figure 15: Connection with the larger UU community**



**Figure 16: HUUF in our community**

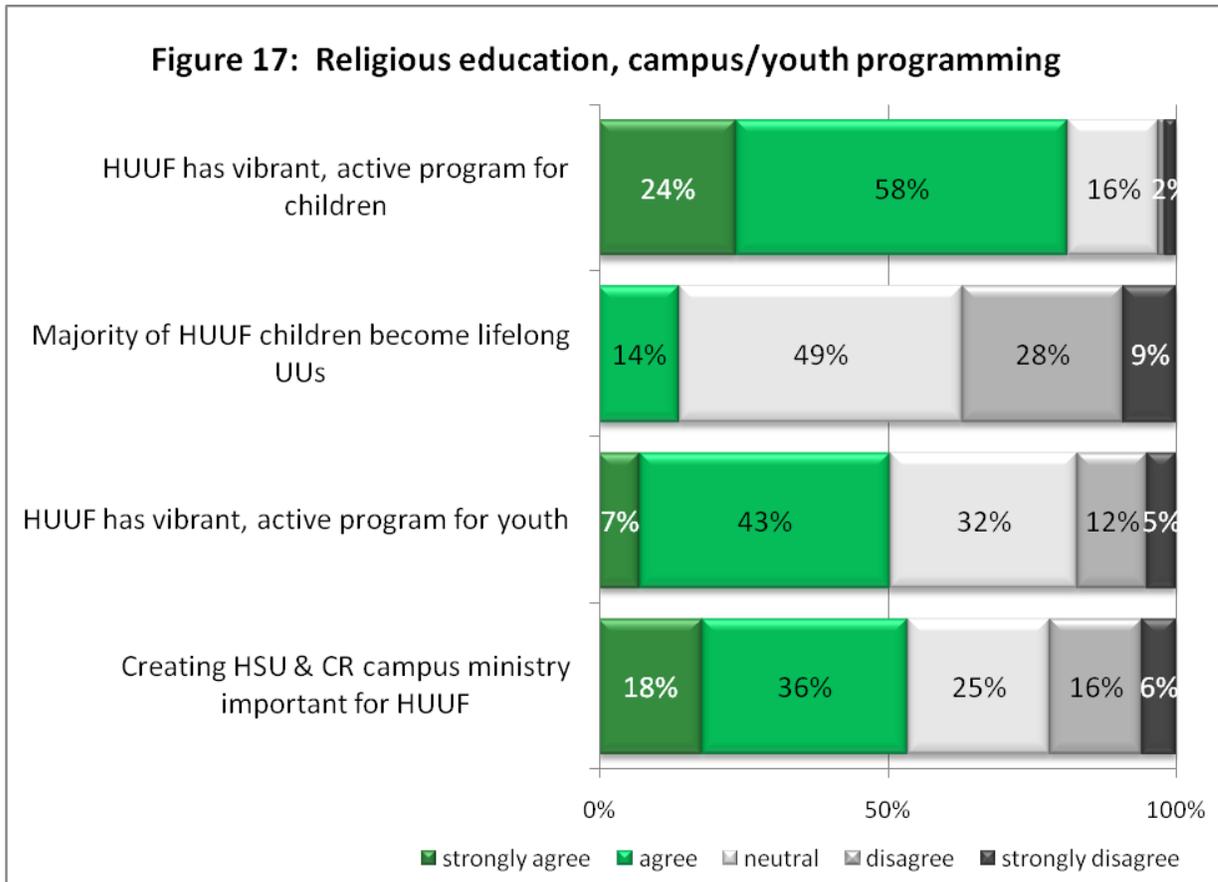


## Religious Education

Eighty-two of us agree that we have a vibrant, active program for our children. We either don't know (49) or don't think that our HUUF children grow up to be life-long UU's.

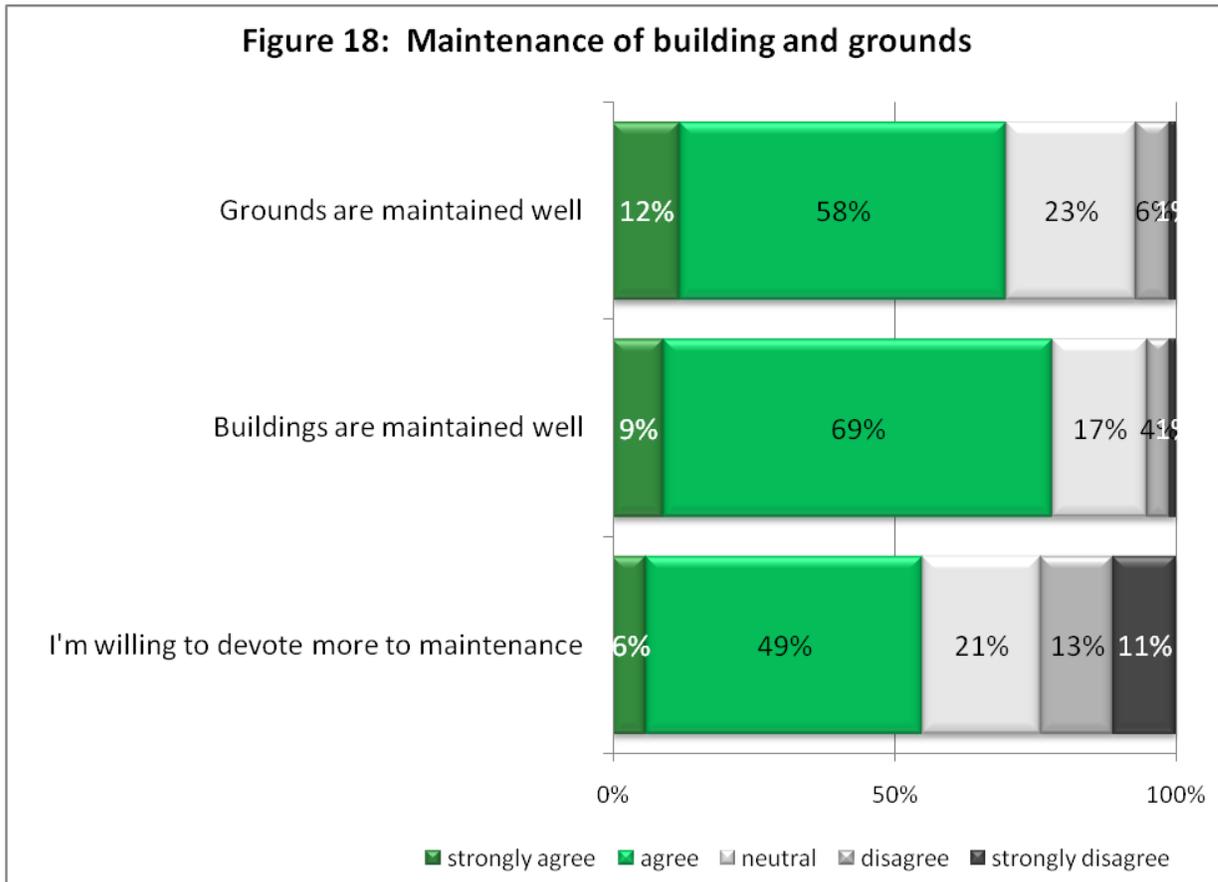
Half of us agree that we have a vibrant, active program for youth and slightly more think it is important to create a college campus ministry. Two comments stated that teens need more supervision.

We seem to greatly value our programs for children and youth and might benefit from more information about how to engage college students and young adults.



## Building and Grounds Maintenance

We seem in strong agreement that our building and grounds are well maintained; and 55 people are willing to devote additional help to contribute to maintenance. Individual comments include a request for a paved parking lot, more custodial help, a master plan for the grounds, a request to complete the path, and to develop the grounds with more attention to beauty.



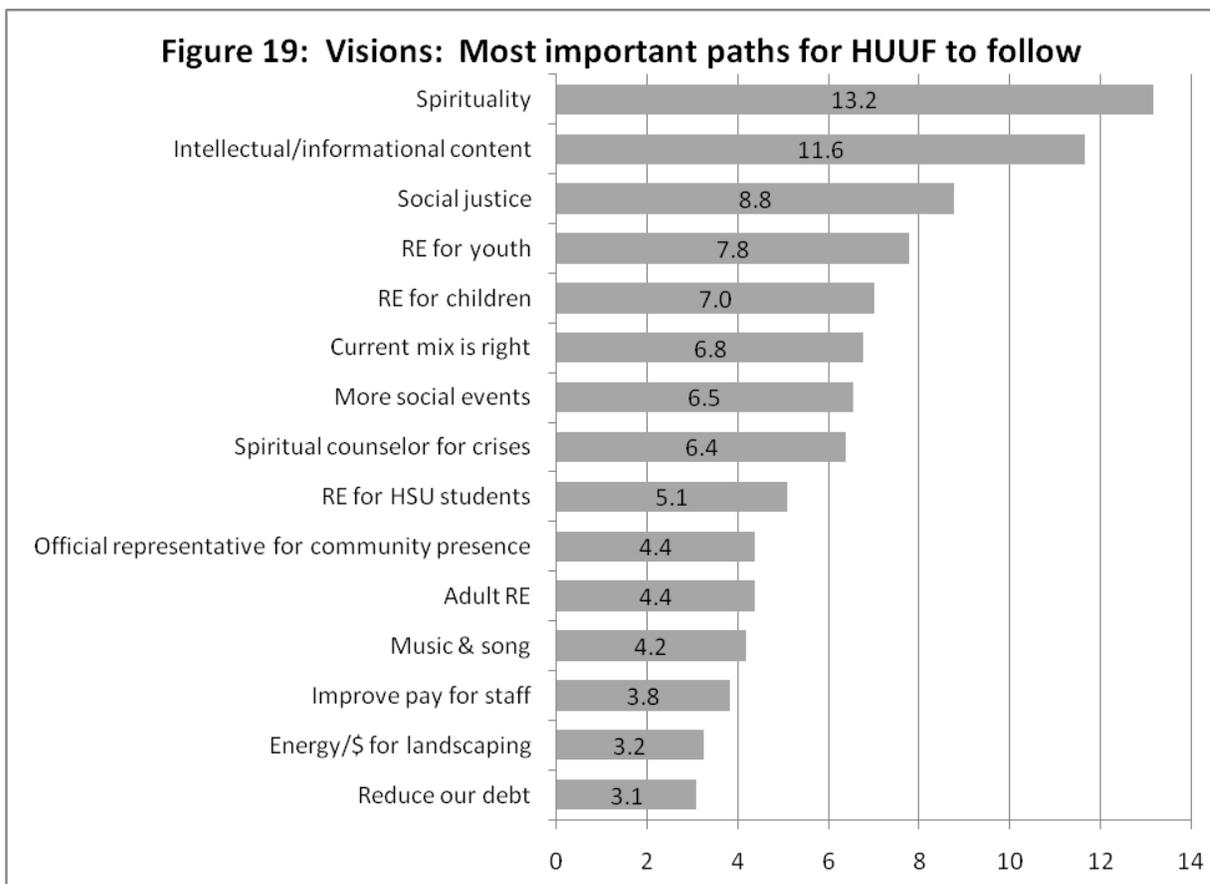
## Visions and Financial Planning Questionnaire

In the last two sections participants in the HUUF Future Forum were asked to give their responses in a different format from all the others. They were asked to imagine they had 100 preference "points" to distribute among the choices to show which future pathways or directions for the Fellowship seemed most important to them. They might divide their 100 points among the choices in any proportion they wished, or even give all 100 to one item.

This format is very difficult to analyze since high numbers could reflect one or two people giving all their points rather than many people desiring it. Every item had at least one person who gave no points to that item. Also, the fact that quite a few people did not follow instructions by allocating more or less than 100 points concerns us. **We cautiously provide the results in the spirit of transparency since this was part of our process and it offers some reflection of values.**

### Visions

For the vision questionnaire 74 out of 103 persons gave responses except for the social justice item and the more social events item where there were only 73 responses. As can be seen by looking at figure 19 the items fell off slowly from the one with the highest points to the one with the lowest points.



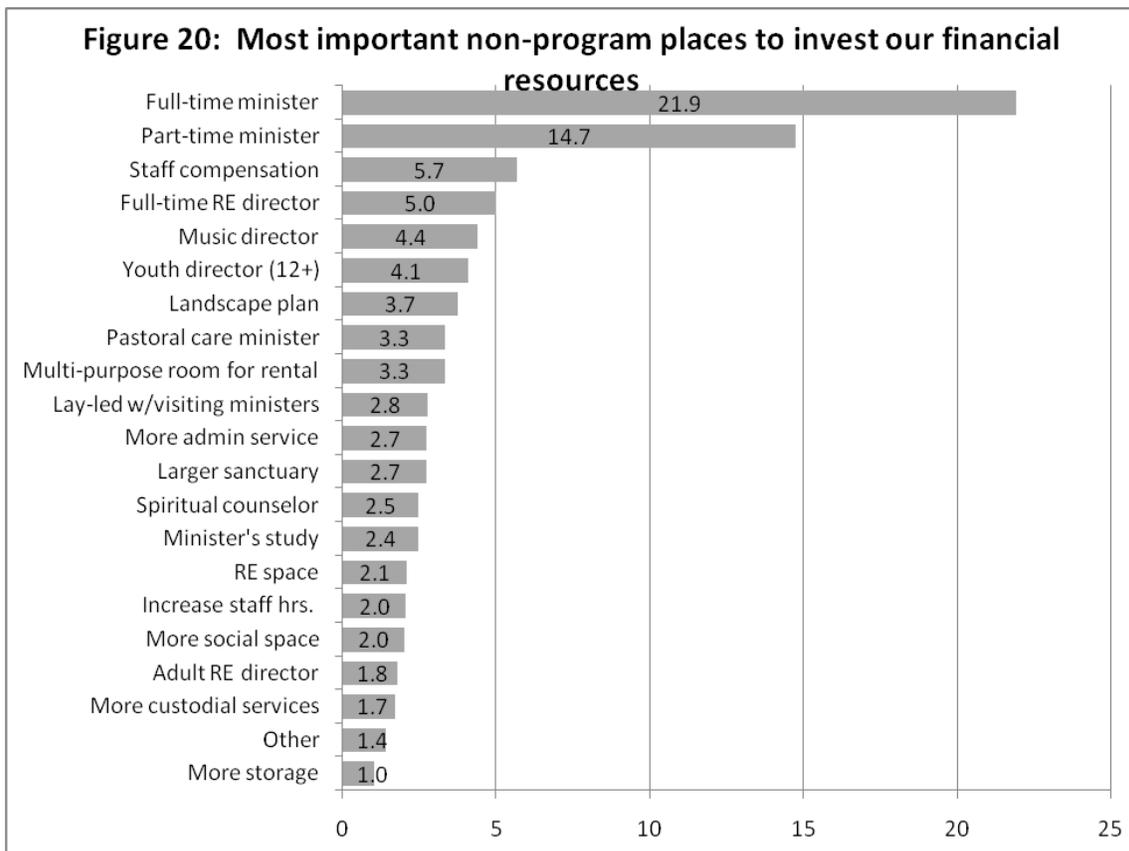
Note: Figure 19 shows the *average points given to each priority out of 100 possible* that each respondent distributed among the listed options. N = 74.

## Financial Planning

In this section people were asked to allocate their 100 points to represent their priorities for distributing money in three areas: Minister, Building Expansion, and Staffing. **It is important to be cautious in interpreting these results as preferences of the members for budgeting purposes since fellowship programs were not included. So, it is not possible to use these results for accurate planning.**

For the most important non-program places to invest our financial resources 63 out of 103 responded to this section. Two items received far more points than the others. Both had to do with investing money in a minister. 1.5 times as many points were given to a full-time minister as were given to a part-time minister. Three people gave their entire 100 points to funding a full-time minister, while only one person gave 70 points to funding a part-time minister (the highest number of points a part-time minister received).

One should keep in mind that the relative positions of each item does not necessarily represent the number of people who support them because of the 100 point distribution scheme. Remember every item had at least one person who gave no points to that item.



Note: Figure 20 shows the *average points given to each priority out of 100 possible* that each respondent distributed among the listed options. N = 63.

## **General conclusions and recommendations**

We have a strong majority agreement that we need to increase members' commitment of time and money, and that capital campaigns work well. While growth in membership is not as strongly desired, it is also acceptable to a majority. Generally, respondents feel that these three strategies would solve our financial problems and allow us to address many more "wants", including funding a minister, additional staff and training, and grounds improvements.

This conclusion is bolstered by the more negative responses regarding the canvass and especially regarding fundraising. That is, for the most part, we feel that we can and should grow to meet our needs, either by increasing pledging or (somewhat less desirable) by adding new members. As we saw in Section 1, some feel that having a full time minister will in itself increase membership. But the challenge remains that we have to see a way to fund the minister first.

Following these results, we recommend that the Board look carefully at whether we can, in fact, fund the expressed desires and wants of the congregation largely via a growth strategy. If pledge growth would be sufficient, then we should proceed to develop tactics to increase pledging.

However, if the Board does not agree that we can accomplish sufficient pledge growth to fund our desires, then it should openly share that conclusion with our members. We need to know what is possible to fund given a realistic look at pledge and member growth. If there are more desires than means, and the suggested strategies for means are not realistic, then we should undertake to increase awareness of this reality. We also need leadership to prioritize the "wants" of our members, using the results of this exercise to the extent that they express clear preferences, and where they do not, to return to the congregation with the clear choices that we must resolve.

The Futures forum exercise did not address the issue of making commitment by members more attractive and efficient, i.e., respectful of their limited time, by streamlining our decision-making and committee structure, in order to motivate more members to take part. Motivating member participation in this way could make it easier to develop consensus around the needed strategies for funding our vision.

We strongly suggest that we cultivate and maintain closer communication with the District Executive Cilla Rawley and leadership to ask for assistance. We have been assured that we can rely on receiving all the encouragement and support the District can muster. We have contributed significantly to the District for years and rarely availed ourselves of its potential support. Given our members' desire to be more connected, this is a good time to do so.

Specifically, there are grants available, especially to outlying congregations such as ours, of between \$10,000 to \$14,000. The most favorable areas for such grants are congregational growth and moving toward professional ministry. A grant for a volunteer coordinator or for financial analysis and planning would also be possible. She can learn from experienced parishioners from other congregations who act as consultants as we explore our attitudes toward growth, our money raising, and other issues.