

Creating Thriving Congregations

If we are going to experience the quality of congregational life that we aspire to, it will not happen by chance. We must pay attention to the structures and processes, what Mead calls *organic growth*: “Organic growth is about the task of building the community, fashioning the organizational structures, developing the practices and processes that result in a dependable, stable network of human relationships in which we can grow and from which we can make a difference.”¹

Systems theory helps congregations with the task of building community and is therefore useful in deepening our understanding of the meaning of membership.

Social systems . . . are complex organisms with distinct parts and orderly processes that somehow form a single entity out of that complexity, within a particular environment. . . . Systems have a boundary that distinguishes and separates them from their environment. They receive input from the environment, they act on those inputs in their own characteristic ways, and they send their outputs back into the environment. . . . In this sense, a congregation is a social system.²

The strength and vitality of each and every UU congregation are central to the strength and vitality of the movement. This is why membership is of such

interest to the Commission. In applying systems theory to questions of membership, we are interested in how those congregations relate to the individual's identity as a Unitarian Universalist. Participation in worship and involvement in the expressions of the congregation's ministry are significant processes that affect commitment and the extent to which individuals engage in the life of the congregation.

This discussion focuses on two functions of the social system that relate to membership formation:

- the definitions congregations use to distinguish themselves from the environment around them, known as boundaries
- the ways in which congregations engage people more deeply in the life of the congregation

What We Are and What We Are Not

Too often a discussion about Unitarian Universalism encounters confusion about what makes a Unitarian Universalist. Lack of knowledge about our movement leads to misunderstandings about who we are (and who we are not!). Jokes abound. Tolerance gets confused with an absence of limits on personal behavior. Children get feel-good education that leaves them without skills and resources to wrestle with the difficult questions of life, and our congregations get bogged down in politeness and political correctness. The Commission believes that congregations can address this confusion and help Unitarian Universalists find deeper meaning in the life of the congregation; an understanding of systems theory helps in this process.

Boundaries help us define who we are, as individuals and as congregations. Definition of membership is an important function of boundary definition. In the free church, the individual determines whether she/he meets the membership criteria defined by the congregation. There is no faith "test." Commitment to the congregation, however, can be sustained better over time if individual members feel a strong connection to the congregation. The inevitable differences of opinion that arise in any human community can be transcended, forgiven, or resolved and in the end contribute to a stronger, healthier congregation. Thus we believe it is important to look at membership practices that help to deepen commitment to the congregation.

Boundary maintenance is a process of managing the tension between what might seem to be competing principles. Being open and accepting can lead to such diffuse boundaries that the congregation has no sense of "center." Defining membership in more specific terms, however, can result in exclusion and narrowness of perspective. How do we find that balance? One UU stated, "A fear

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of mine is that if we don't have some kind of framework as to what constitutes a UU society or person, then how can we call ourselves anything? . . . Have we become so liberal finally that we aren't really anything? Are we in danger of 'tolerating' ourselves out of existence as a significant religious movement which offers, all in all, an alternative to mainline religions?" By developing structures and processes for membership, a congregation can better define its boundaries and provide an environment where individuals can pursue their own religious development.

Engaging in Congregational Life

There are two key factors in how a congregation defines its boundaries and engages people in the congregation that have particular relevance to our understanding of the organic dimensions of membership: norms/expectations and beliefs/values. These factors shape the ministries of the congregation and help the congregation to define itself and articulate its meaning of membership.

Norms and expectations are the guidelines for what is acceptable and what is not acceptable in the congregation. "In all sound systems," says Mead, "the boundary between what is acceptable and what is unacceptable is enforced by everyone and by no one."³ It is typical for norms to be unspoken, often communicated by non-verbal behaviors. One often does not know about a norm until he/she has violated it. These unwritten rules can be confusing to newcomers and often become an impediment to creating healthy, open communities. A norm that "we are like a family" can create small, close-knit groups that make it extremely difficult for a newcomer to make a connection within the congregation. Such descriptions should, in fact, raise questions about whether the boundaries are too rigid and exclusive. The Commission has found, in our conversations around the continent, that many congregations have norms, or implicit covenants, for group membership that are not articulated and may be undermining stated goals for growth. It is not uncommon to hear stories of visitors to our congregations feeling ignored during the coffee hour, despite statements of welcome from the pulpit. We have heard often of people who come to our congregations searching for religious community who end up feeling discouraged and excluded. This may be due to inexplicit norms or rigid boundaries in the congregational system.

Many congregations have clarified the norms of the congregation by articulating the responsibilities of membership, developing an explicit covenant. These congregations are becoming more intentional about the meaning of membership. Membership covenants vary, reflecting the diversity of language and image that characterizes congregational life. These articulated expecta-

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tions are examples of “high” membership requirements. They usually take the form of a statement of responsibilities of congregation membership, and many include the following expectations:

- Worship with the congregation.
- Pursue your own spiritual growth.
- Join in the work of the congregation.
- Pledge at a level commensurate with commitment to the congregation.
- Perform service to the wider community.
- Connect with the larger UU movement.

Beliefs and values are another element of a social system. They are its “center of gravity.” Most faith communities build their social systems around a clearly defined belief system. A central premise of Unitarian Universalism has historically been our “free faith.” No creed or dogma will exclude members, and members will not be required to subscribe to any creed. Our commitment to a free and responsible search for truth and meaning can make it difficult to find that center of gravity that can help a congregation develop cohesiveness and a sense of purpose. Rev. Barbara Wells writes, “At times we have taken our freedom to mean lack of commitment. Too often churches have been unclear what commitment to membership means and have been unable to give fellow journeyers maps to lead them into a deeper relationship with the church.”⁴

When the congregation does not create an environment in which beliefs and values are openly expressed and examined on an ongoing basis, behavior may not correspond to the stated norms. It is not uncommon to hear UUs relate stories of the elation they felt upon first finding a liberal religious environment in which they could express their deepest spiritual searching, only to experience profound disappointment that their “truth” is somehow not accepted by others in the congregation despite the statements of openness and tolerance. The Commission has heard from many who experience disapproval or non-acceptance when their religious or spiritual paths lead them away from the prevailing norms of their congregations.

This change in the nature of individual religious experience over time is not surprising; in fact it is encouraged and expected in a free faith where the unveiling of truth is seen as a work in progress. Our faith calls us to live in the creative tension between what we have understood and what we are coming to understand. The living tradition of our Unitarian Universalist faith does not see religious truth as a static condition but rather as one of continuous revelation. The religious views and values that lead one into membership of a UU congregation at one stage in life should evolve over time. That one’s beliefs and values would be questioned, examined, and even changed as part of the spiritual growth process is desirable. Looking at this from a perspective of organic growth, congregations need to develop approaches to membership that respect

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and celebrate ongoing faith development so that people can deepen in their commitment rather than feel excluded or unwelcome.

Systems theory tells us that a healthy organization lives with this tension, sees it as a creative force, and develops procedures and practices that encourage clarity and openness simultaneously.

Moving toward Deeper Commitment

How can congregations best adopt organic structures that promote a broader understanding of the meaning of membership? Church membership literature discusses two dimensions of membership that affect depth of commitment: entry and maintenance. *Entry* refers to the requirements for entry into membership in the faith community and *maintenance* refers to the visible forms of commitment necessary to keep that membership status.

Each of these dimensions is seen as being low or high. Many of the new, rapidly growing non-denominational churches have high entry requirements and high maintenance requirements. Although many people attend the services and share in the religious life of the community, actual admission into membership takes place only after demonstration of willingness to meet high demands of membership (both in financial, personal, and faith dimensions). Unitarian Universalist congregations, perhaps in response to rigid creed and restrictive theologies of previous religious experience, often have low entry and low maintenance requirements. Most UU churches require only the signing of a membership book and perhaps some minimal evidence of financial support. The Commission heard many stories of casual approaches to signing the membership book. The Commission believes there is a place between casual and conforming and that place can be better defined if our congregations pay attention to the structures and processes of membership.

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What initially attracts a person to a UU congregation is unlikely to be what keeps that person as a committed, growing participant in the life of the congregation over time. UU ministers working in the extension program to strengthen and grow existing congregations as well as to launch new congregations provide valuable insights in this discussion. These approaches, often referred to as the path to membership, reflect the progressive nature of identification with Unitarian Universalism as a movement. Healthy congregations understand this developmental process and create programs (or ministries) that respond to peoples' needs over time. Many congregations have developed orientation programs for people in the initial stages of identification with a Unitarian Universalist congregation. Growing numbers of our congregations invite people into small groups, often referred to as covenant groups, where they can build relationships with others. As people deepen their commitment, perhaps moving into formal membership, they are encouraged to ex-

plore the history of the Unitarians and the Universalists through religious education classes and branch out into the life of the congregation through service in various programs. Formal membership may not take place until people have been participating in the community for some time and understand the significance of the congregation and the movement in their personal and spiritual lives. Some congregations have requirements for formal membership such as participation in an orientation session or a meeting with the minister; most, however, encourage but do not require such actions. Methodist evangelist John Wesley recognized the different steps in the path to becoming a committed believer. Each step is important in its own right and must be recognized for the different needs and readiness it represents. The path to membership would be a Unitarian Universalist version of the stages identified by Wesley. Regardless of the specific process, increasingly our congregations are implementing strategies that support people as they move along this path. Many congregations, however, still look at membership as an either/or proposition. You are either a member or you're not. It is the Commission's fervent hope that these congregations will be moved to a new understanding of membership and implement recommendations from this report.

Membership Issues

Keeping in mind that a systems perspective on membership focuses on those procedures that a congregation puts in place to define its boundaries and thus its identity, the Commission has found a number of issues that trigger discussion and, at times, confuse our understanding of the meaning of membership. These issues lead to provocative questions that can provide the basis for discussion and discernment. We do not propose answers to these questions; rather we encourage dialogue within congregations and throughout the movement, thus increasing awareness and more intentional practices regarding membership. The particular definitions of membership matter less to us than do the steps taken by our congregations to define and clarify expectations on the part of each congregation. Thus, expectations are made more explicit and open to congregational awareness.

The Issue: Annual Program Fund

Numerical growth is the dimension most often discussed in regard to the relationship between the Annual Program Fund (APF) and the meaning of membership. Discussion and debate abound about how many UUs there are in North America. Many maintain that there would be more (numerically) if the APF used a different way of assessing a congregation's contribution to the UUA (referred to as the Fair Share). Some maintain that the reason the denomina-

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tion's growth curve (as measured by number of adult members) is not an accurate reflection of membership size is because congregations are manipulating numbers in order to reduce the Fair Share assessment. Those most familiar with the history of these efforts have told us that, whatever indicator is used to calculate the Fair Share (average attendance, annual budget, and so forth), the growth curve measured by that variable levels out while other indicators change.

The UUA established a per member recommended contribution for congregations. This sum, often referred to in Commission hearings as a "head tax," is perceived by many to be the culprit behind the confusing numbers associated with the question, "How many Unitarian Universalists are there?" At every hearing held by the Commission during this study, someone would raise this issue as being at the heart of the "membership problem." Many congregations establish a "minimum contribution" for voting membership that corresponds to the congregation's assessed Fair Share. They want to make sure, it seems, that it does not cost the congregation to have someone's name on the membership roles. Many have proposed to the Commission that the question of membership would be less troublesome if the UUA did not assess this "head tax." Several years ago, large congregations were offered an alternative method for assessing their Fair Share contribution. Many recommended to the Commission that this strategy be adopted for all congregations. There may be merit to these suggestions, but the Commission believes that, in terms of membership, it misses the point. One UU in communication with the Commission raised the concern "that if we try to devise a formula that is going to be—without exception—totally and completely 'fair' for every single congregation at any particular stage of its life, we'll end up with formulae as complicated . . . as the IRS's Form 1040." The real issue, we believe, is building a strong, vital voice for our liberal religious values. The APF is one strategy for generating the financial commitment needed to assist in this effort.

Focusing on minimal contributions sufficient to cover the per member contribution used in the calculation for association and district contributions distracts us from the real work before us. In a conversation with the Commission on Appraisal, Rev. John Buehrens calls this kind of attention to detail, "policing the fringe," meaning that excessive attention to these kinds of issues distracts us from the heart and depth of our message and its importance to the world. We must move beyond numbers so that our policies and practices of membership are shaped by a deeper and more meaningful commitment to our religious movement and not by a preoccupation with fundraising strategies.

The Question: When dealing with fundraising policies and practices, how do we best avoid obsession with the peripheral issues and get on with the business of growing strong congregations that take the message of our free, liberal faith to the world?

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The Issue: Dual Membership

Many Unitarian Universalists belong to or attend more than one congregation on a regular basis. The most common situation is from the “sun birds” or “snow birds”—that is, people who summer or winter in another region of the country from their regular home. These congregations face many unique issues: counting part-time residents for the APF; determining a level of expected financial contribution; building budgets and raising funds to serve a congregation with peaks in participation; maintaining connections with part-year residents; and involving them in volunteer service in the congregation.

There are no simple answers to these questions, and to some degree each situation is unique. The question about the APF would simply disappear if a change from a per-member calculation for APF were adopted. The issues of promoting generous support for both congregations would remain. Other issues can best be resolved based on some basic principles.

We urge a broader conceptualization of membership that can help congregations address this issue. The connection of a person to the Unitarian Universalist movement ranges from visitor to church leader. A part-time resident may have a stronger connection to one congregation or the other, even though he/she is registered as a member in both. He/she may play different roles in each congregation. It is the connection to the congregation that is important, and focusing on a person’s part-time status may weaken that connection by making people feel excluded.

In most of our congregations, the required financial contribution, if any, is minimal. We rely, as a matter of principle, on the individual or family unit to consider the financial needs of the congregation and their financial capability and to make a free decision about their giving. This is a matter of principle because, just as we respect each person’s spiritual path, we respect their personal property. In each case, we avoid coercion. We suggest that the financial relationship between congregations and part-time members be handled in a similar way. Members must be made aware of the costs of providing services so that they can make appropriate financial commitments.

It is much the same with volunteer activities. Congregations can make a specific effort to organize their volunteer opportunities to accommodate the residential patterns of the members. Members can participate and make commitments even on a part-time basis. In recent years, people in many congregations are often less willing to make long-term commitments to committee work, and so congregations have tried to use shorter term task forces. This response is also suitable for part-time residents, allowing them to share their talents and experience in meaningful ways despite their regular absences from the congregational community. Dual membership does not have to be an “either/or” proposition.

In this regard, one dimension of membership that has not been discussed thus far in the report pertains to what happens when a person moves from one

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location to another. Often, he/she looks for another UU congregation in the area. There is, however, no process for notifying a congregation that a member of another congregation has moved to the area. In other denominations there is a formal letter of transfer of membership. As each UU congregation controls its membership, such a process of transfer of membership would not conform with our polity. A letter of introduction, however, would make that person feel more welcome and might preserve that member's connection with the Unitarian Universalist movement. Such a communication could help address the confusion some congregations and members experience in regard to dual membership.

Issues of transfer of membership and affiliation with the larger movement are especially germane when it comes to youth and young adults in our movement. As young people move away from their home congregations to go to college or establish themselves in professions in other parts of the country, their connection to the movement is even more important. Some UU congregations, as a part of their ministry to youth and young adults, take explicit steps to help young people find and affiliate with a UU congregation where they will be relocating.

The Questions: How can congregations be encouraged to see dual members as welcome participants and resources instead of problems? How might congregations with a substantial incidence of dual membership work together to help an individual grow a deeper commitment to the movement and to both congregations? What are strategies to provide a connection with the larger UU movement for youth and young adults as they leave the home community?

The Issue: Increasing Membership Requirements

As part of the study on membership, the Commission met with Unitarian Universalists all over North America. Without fail, the issue of raising the "entry" and "maintenance" expectations as a way to grow commitment was brought up in our hearings. While most participants agreed that increased commitment and depth of membership is desirable, they did not necessarily agree about how to achieve it. UUs spoke of increasing required financial contribution as a condition of membership. Other UUs spoke of removing financial contribution as a condition of membership entirely. Some congregations require a meeting with the minister and/or a vote by the Board of Trustees. Others make no requirement except signing a membership book. In yet another approach, many congregations encourage and invite persons interested in affiliating with the congregation to participate in orientations, membership classes, and so forth but do not actually require such participation. The approaches taken by those who spoke with the Commission were as many and varied as the congregations themselves.

Membership processes should address the fact that membership in the local congregation also includes a larger affiliation with the UU movement.

The Commission heard a slightly different perspective on this issue when we met in Canada. Representatives of Canadian congregations identified a cultural difference on this issue, saying, “We are slower to make the commitment but when we make it, we make it stronger.” Some attribute this to a cultural norm in Canada that is less individualistic than is generally found in the United States. The high rate of Fair Share contributions of Canadian congregations to the Canadian Unitarian Council was given as one example of that deeper commitment.

Regardless of the specific requirements for formal membership, the Commission believes that congregations will benefit from instituting more intentional strategies to affirm the meaning of membership. We also believe that membership processes should address the fact that membership in the local congregation also includes a larger affiliation with the UU movement.

The Questions: Do explicit criteria for membership violate the premise of our free faith? Are such criteria congruent with the principles and purposes of the UUA? How can a congregation best maintain the “creative tension” needed to define effective boundaries? What benefit accrues to congregations that help members strengthen their sense of affiliation with the larger UU movement? Should members coming into membership from another UU congregation be expected to participate in orientation programs and other classes designed to deepen commitment, such as those offered as part of the path to membership?

The Issue: Exclusion from Membership

Exclusion from membership seems totally contradictory from the traditions and principles of our free faith. Yet many do feel excluded. Exclusion can be formal (or deliberate) or informal. Informal exclusion happens most often when norms and expectations are not explicit. They may be inexplicit because of the homogeneity of the congregation. For example, a congregation that is predominantly (if not exclusively) made up of people of a similar theological bent, class, or ethnic heritage can exclude people from the congregation unintentionally. Informal exclusion can occur as well because of the familiarity and general informality of the relationships among people in the congregation. Eager and warm greetings among regular participants in the congregation—for example, during the coffee hour—can lead to unintentional exclusion of visitors and newcomers.

Unintentional exclusion, however, is not limited to visitors on Sunday morning. It may be, in fact, more common with people who have become more familiar with the congregation but are not yet engaged. They are past needing a friendly greeting on Sunday morning, but they are not yet integrated into congregational life. Responses to a survey conducted by the Commission as

part of our study reveal that most congregations struggle with the inclusion of people in the life of the congregation. Respondents spoke of ongoing efforts to engage people who are on the periphery and of friction and discomfort among long-time and relatively new members: “It takes time to really belong. There is some mistrust on the part of old-time members—i.e., ‘newcomers don’t know how we do it here.’” “Long-time members are hungry for new blood, yet there is real resistance to change which, of course, new folks bring.”

Another dimension of informal exclusion is self-exclusion. Self-exclusion can take place when visitors, “seekers” if you will, find that a particular congregation is not what they were looking for in a faith community and choose to go elsewhere. Some self-exclusion can be indicative of good boundaries and clear norms and expectations. As one survey respondent said, “Those who don’t fit in don’t stay.” Some self-exclusion, however, takes place because of non-welcoming behaviors on the part of the congregation. These informal excluding practices are of great concern for they turn away those who are perhaps UU by identification but cannot find their way into the life of the congregation. As a result, we are all diminished.

A systems perspective on exclusion looks at bringing those informal or in-explicit practices into greater awareness and on the role that deliberate or formal exclusion plays in defining the boundaries of the congregation. In its 1997 report *Interdependence*, the Commission on Appraisal recommended that congregations establish provisions in their bylaws for the exclusion from membership in cases where an individual’s behavior threatens the congregation’s well-being. Most congregations remove people from membership only in response to circumstances in which the member has stopped participating, most generally financially, in the life of the congregation. There has been growing interest, however, in the question of excluding persons whose behavior violates the basic expectations and norms of the community. Increasingly, our congregations are recognizing that “living in a community implies—no, requires—an agreement on fundamental values.”⁵ Behavior that threatens those values, in some cases, justifies exclusion from membership.

Some congregations have established procedures for involuntary exclusion from membership for destructive and threatening behavior. *InterConnections*, a UUA publication for lay leaders of UU congregations, addressed this issue in an article called “Handling Disruptive People: Policies That Ease the Strain.” This is an example of boundary definition, whereby a congregation adopts specific policies for involuntary exclusion of a member. Rev. Ken Collier, who believes every congregation should have a policy addressing disruptive behavior, states, “Inevitably there will be these kinds of crises. It’s really important to have thought through these issues before they occur.”⁶ Most often these policies permit expulsion of anyone, with due process, who becomes a perceived threat to safety, disrupts activities, or *diminishes the appeal of the congregation to potential and existing members.*

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It may not be so difficult to reach agreement about the need to remove someone from membership for threatening others with physical harm or for fomenting loud and angry interruptions to the Sunday worship service. It is more difficult, however, to reach agreement about the criteria and procedures for doing so. Many congregations do not have procedures in place to deal with even the most obviously threatening and invasive behaviors. As a result, leadership must expend considerable time and anguish developing a fair, compassionate, and clear response while they are in the middle of the crisis. Many congregations have established guidelines and procedures regarding contact with children and youth by persons with a history of abuse or assault. Experience demonstrates, however, that this is not the case with most congregations. Is it not healthier to engage in the steps needed to clarify norms and expectations as a part of the congregation's ongoing programs and activities than to find ourselves in a position of reactivity to uncomfortable situations? The recommendation that congregations think about this and develop procedures ahead of time is good advice.

It is, however, a challenging and slippery slope to define activities that “diminish the appeal of the congregation to potential and existing members” as grounds for formal exclusion. One person's prophecy may be seen to diminish the appeal of the congregation to others. Our discussion later in this report will address questions of inclusion and our difficulties learning to live with discomfort in order to create a diverse and welcoming community. As important as it can be to have clear expectations and procedures to deal with such situations, it is equally important that the congregation carry on careful and thoughtful deliberation lest they exclude people whose voices bring richness and creativity to the conversation, even if they also bring discomfort. This is yet another example of the creative tension in which we believe we must live if we are to grow vital and healthy congregations.

What fundamental values are so central to the core of our Unitarian Universalist congregational life that to threaten them would justify formal exclusion from membership?

The Questions: What fundamental values are so central to the core of our Unitarian Universalist congregational life that to threaten them would justify formal exclusion from membership? What kinds of behaviors diminish the appeal of the congregation? What would it mean to a congregation to have a discussion of this issue as part of a process to define its center of gravity? What if the norms and expectations were to become more explicit rather than implicit?

We hope these questions have stimulated you to think about the process of growing members in your congregation. They are not the only questions. It is important to also challenge some of your beliefs and assumptions about the meaning of membership.

Notes

1. Loren B. Mead, *More Than Numbers: The Way Churches Grow* (Washington, DC: Alban Institute, 1993), 60.
2. *Ibid.*, 60.
3. *Ibid.*, 65.
4. Barbara Wells, "Path to Membership: A Philosophy for New Member Ministry."
5. Terrance Sims, "Decision Making in the Congregation" (paper for Starr King School for the Ministry, April 2000).
6. Ken Collier, "Handling Disruptive People: Policies That Ease the Strain," *InterConnections* (March/April 1998).

