

Growth Test - Does my congregation get enough visitors to grow?

Enter the requested information in the shaded yellow boxes **Instructions in bold are for PDF file users to calculate manually.**

Current number of members What is provided to UUA as your certified number

Enter ONE of the following

Annual visitors First-time, local adult visitors in the past 12 months

OR

Weekly visitors Approximate number of first time, local adult visitors every week
Be sure to average in any weeks you get NO visitors

Ratio of Visitors/Members **Identify the total number of first-time, local adult visitors you get in a year, and divide by the number of members you have. Enter the result in the green box. Divide the annual result, above, by 52 to obtain the weekly number.**

If the number in the green box is close to or more than 1, you are probably getting enough visitors to grow.

If your number is close to or over 1 and you are still not growing, you may be unintentionally making visitors feel unwelcome (refer to the **Return Rate** spreadsheet tool), not be converting enough visitors to members (refer to the **Conversion** spreadsheet tool), or are losing too many members (refer to the **Loss** spreadsheet tool).

If the number in the green box is significantly less than 1, you may not be getting enough visitors to grow.

[See pages 18-29 of The Membership Journey for suggestions on how to increase visitors.](#)

Guest Calculator - How many visitors do we need to meet our growth targets? Instructions in bold are for PDF file users to calculate manually.

Enter the requested data into the shaded boxes:

Please note: Please send us your figures and we will calculate the results for you. The formulas are complex to communicate, verbally.

Current Number of Members
Membership Goal (total)
Years to Growth Goal

What is provided to UUA as your certified number
Total number of certified members you want to have
Years between now and the goal. If less than a year, express as a decimal.

Use the following rates (blue boxes) unless you have more accurate ones for your congregation

Conversion Rate (New Members/Visitors) **18%**
Annual Membership Loss Rate **10%**

Use a number between 16-20%, or your percentage from the "**Conversion**" tool
Use a number between 8 and 12%, or your percentage from the "**Loss**" spreadsheet tool for TOTAL membership loss

Required number of weekly local, first time guests to reach growth goal

weekly guests

first time, local guests per week

[For suggestions on how to reach that many visitors, see pages 18-29 of The Membership Journey.](#)

Return Rate - Are we repelling too many visitors?

Enter the requested data in the yellow shaded boxes. **Instructions in bold are for PDF file users to calculate manually.**

Number of visitors four months ago

Total first time, local visitors a full four months earlier

Number of visitors who have returned

Total first time, local visitors who came for the first time four month ago, and have come back at least once since then

Guest return rate

Four month rate

Count the number of local adult visitors in any given month, and keep track of whether or not these specific visitors return over the next four months. Divide the number who return by the total who came in that month.

This number typically ranges from 20 to 40% and can vary widely from month to month. It is best to keep track of this for several months, and then add all the total number of returning guests and divide by the total number of guests who have come the first time.

If the number in the green box is on the high side of the range, you are probably doing a good job of welcoming guests when they first start coming! If on the low side, you may not be making them feel welcome enough to give you a second chance.

The best way to find out is to ask them. See our online **Guest Survey**.

[Suggestions on how to make visitors feel more welcome can be found on pages 13-17 and 19-24 of The Membership Journey.](#)

Conversion - Is our “path to membership” effective?

Enter the requested data into the yellow shaded boxes. **Instructions in bold are for PDF file users to calculate manually.**

Enter ONE of the following:

Annual visitors

First time, local visitors in a given year

OR

Weekly visitors

Approximate first time, local guests each week

New members

Number of new members who sign the membership book in a given year
If this number fluctuates significantly, use an average of the past three years.

Annual

Conversion rate if you used annual visitor data

Weekly

Conversion rate if you used weekly visitor data

Count the total new members in a given year, and divide by the number of first-time, adult, local visitors in that same year.

Evangelical churches claim that 25% of their visitors end up joining the church. Data from the UUA's Houston marketing campaign suggests a similar number. Most liberal churches appear to be closer to 15-20%.

If the number in the green box is less than 20%, first determine if it is "first impressions." Do your first time guests come back for a second look? (See the "**Return Rate**" spreadsheet tool.) Or do you need a more effective way to convert interest to membership? If the number in the green box is 25% or more, you are likely doing an excellent job of converting guests to members.

Active Membership - Are our new members likely to stay?

This worksheet requires collecting data over a 12 month period of time. **Instructions in bold are for PDF file users to calculate manually.**

In the left hand column of yellow boxes, input the members who join each month.

In the right hand column of yellow boxes, input the members who are participating in some ongoing activity of the church, such as choir, teaching religious education, or active committee membership, six months after they have joined.

Use the following to find out what goes in the corresponding green boxes below:

For each month with new members list each monthly figure in the left-hand column of yellow boxes, as said above.

Then you will figure the rate of participation for each month's group. For example, in the first row divide the figure for July (in middle column) by the one for January (left-hand column), and so on. Then enter the results in the green boxes, below, making the first green-box figure correspond to the first row of yellow boxes, and so on.

Number of members joining that month	Members from a given month active six months later	New Member Participation
Jan	Jul	TBD
Feb	Aug	TBD
Mar	Sep	TBD
Apr	Oct	TBD
May	Nov	TBD
Jun	Dec	TBD
Jul	Jan	TBD
Aug	Feb	TBD
Sep	Mar	TBD
Oct	Apr	TBD
Nov	May	TBD
Dec	Jun	TBD

Annual New Member Participation Within First Six Months
Total the July - June yellow boxes and divide by the Jan - Dec total, for your annual new member participation percentage. Enter this in the blue box.
TBD =
to be determined (calculated)

Evangelical churches claim that 90% of their new members are active within a year. Clearly, higher is better, but not all new members will feel comfortable with a high level of activity. If your rate isn't at least 60%, too many members may not be connecting with the congregation and you may lose them.

Percentages will vary widely from month to month. Once all 24 yellow boxes have been filled in, your annual percentage participation will be shown in the blue box.

Loss - Are we losing too many members?

Please enter the requested data in the shaded yellow boxes. **Instructions in bold are for PDF file users to calculate manually.**

Last Year's Membership Membership number turned into the UUA last year

This Year's Membership Membership number turned into the UUA this year

New members in past year Members who joined between the two counts

Members lost in past year

Membership Loss **Start with last year's total membership, add the new members from the months between the two counts, and subtract this year's membership. Please contact growthresources@uua.org for more information.**

Expect the number in the green box to range between 8 and 12%. A common reason for it to be significantly higher is a "clean up" of the church rolls, i.e.: "members" who have not been present for some time and probably should have been taken off the list earlier.

It is useful to break down the number of members lost into categories of why they left, i.e.: moves, deaths, or other reasons. Please enter the requested data into the two yellow boxes below. Note that the total losses cannot be more than the "members lost" above!

Movers Number of members who were removed from membership because they moved away in the past year

Deaths Number of members who were removed from membership because they died in the past year

Other This number represents people still in your area who are no longer members. **To figure this number add last year's membership to the new members joining since then, now subtract from that total this year's membership and the movers and deaths above since last year's count was taken.**

Expect about half of your losses (4-6% of membership) to come from moves. If higher, you can expect your overall rate to be higher. **Figure this by dividing the number of movers by last year's membership.**

Expect about 1-3% of your membership losses to come from deaths, especially if you have an older congregation. **Figure deaths and avoidable by dividing the deaths and "other" by last year's membership, respectively.**

This represents true "avoidable" loss of your congregation. Some loss is inevitable - if yours is more than 2-3% investigate why. One way to do this is through **Exit Interviews**. The most common reason in any one year is a "clean up" of the church rolls, i.e.: "members" who have not been present for some time and probably should have been taken off the list earlier.