SPRING 2015 | OUTREACH TEAM

Beta-Testing Program
Final Report

Helping congregations align signals and identity for effective community outreach
Introduction

Background

Unitarian Universalists want our message of compassion, justice and personal growth to reach more people. The 2011 Gathered Here initiative brought together over 1000 UUs to develop a vision for our future, which included a desire for Unitarian Universalism to be better known in the world. To meet this goal, the Unitarian Universalist Association invested in a new UU brand identity and outreach framework, intended to convey our core values in a clear and compelling way. Debuting in the Spring 2014 issue of the UU World magazine, the brand identity provides an engaging look and feel Unitarian Universalism. It includes an updated logo, colors and design elements, and key language describing who we are as UUs, what we do, and why it matters. The framework recognizes that, given the shifting landscape of religion in America, it is not enough to “preach to the choir” or wait for people to seek us out on their own.

In addition to the logo and visual design elements, the UUA created guidelines for how congregations and individual UUs can implement the UU brand identity in their communications.

Beta-Testing Program

To help more people understand how to use the UU brand identity to improve community outreach, the UUA developed a study guide for UU congregations and groups called “Love Reaches Out: Aligning Signals and Identity.” The preliminary version of the guide was made available to congregations who agreed to participate in a new beta-testing program.

This outreach beta-testing program was designed to gather feedback for the final version of the study guide and to help the UUA understand the outreach and branding needs of congregations. Further, the program hoped to build excitement about outreach and communications among congregational and group leaders.

Seventy-one congregations and groups, representing each of the five regions of the UUA, initially joined the program. Sixteen congregations finished the
program, completing the study guide workshops and an outreach project. An additional twelve completed some of the study guide workshops but had not finished the study guide or an outreach project at the time of this report. Of those who joined the program but did not complete it, most were interested in exploring brand identity questions and developing a plan for outreach. The biggest obstacle for these congregations was meeting the timeline, especially as competing demands arose during the year.
Program Description

Starting Out

The beta-testing program was announced in June, 2014 at General Assembly in Providence, RI, with registration for the program open until late August. It was also promoted through UUA email, social media and other communications venues. Congregations signed up to participate through an online form. Carey McDonald, Outreach Director, and Rev. Sarah Gibb Millspaugh, Outreach Associate for Digital Ministries, provided primary staff support for the program.

Participating congregations were asked to make the following three commitments:

- Attend a kick-off webinar in late August
- Lead the three study guide workshop sessions in September and October
- Complete one outreach project using the brand identity to connect with the audience niche identified through the study guide activities

Participating congregations were expected to have the support of their leadership (senior minister, staff, board president, etc.). Finally, congregations were asked to report back to the UUA on their process and findings.

Kick-off Webinar

Initial response to the program was very positive, and high attendance at the kick-off webinars reflected that excitement. In surveys, participants reported that the kick-off webinars were most helpful in providing background and framing for the project. Survey respondents recommended focusing more on direct instructions for facilitating discussions and using the materials.

Through September and October, UUA staff remained in continuous contact with participating congregations by monitoring progress, answering questions and sending periodic email updates.
Study Guide

The study guide consisted of three 90-minute sessions with scripts, activities, discussion prompts and handouts:

1. **Sharing Who We Are** – introductions; the need for outreach, brand identity and high quality communications
2. **Identity and Signals** – clarifying your congregation’s identity, passion and priorities; learning what signals your congregation is sending
3. **Sweet Spots and Taking Action** – finding the “sweet spot” where your congregation’s passion and your community’s needs overlap; figuring out what next steps will be, identifying an audience niche and outreach plan

Once a participating congregation finished the study guide, they filled out an online survey to give detailed feedback on the study guide activities. This survey also collected each congregation’s identified audience niche and outreach project (see the Appendix for a list of the audience niches and outreach plans of the congregations which completed the program).

Participants spoke highly of the study guide activities, particularly appreciating the conversations about how Unitarian Universalism had impacted their lives and about their congregation’s unique “sweet spot.” They also recommended making the study guide more modular, since congregations begin the process with different levels of understanding about themselves and their communities.

Learning Circles

Congregations that completed the feedback form were placed into a learning circle. UUA staff facilitated these virtual discussion groups, and anyone from a participating congregation could join. Two learning circles, East and West, were established (congregations were divided by time zone to make scheduling easier), and they met once a month from November-January with each meeting lasting 60-90 minutes.
Learning circle gatherings provided the opportunity for leaders to learn about each other’s outreach plans, to examine case studies from their own experiences, and to discuss the challenges they faced. Many challenges were similar across areas, such as sustaining the focus of their fellow congregants, encountering internal resistance to change, and finding the right language to use with visitors. Participants reported the learning circles offered critical support and fellowship, and that they enjoyed the creativity demonstrated by their peers.

**Wrapping Up**

During the learning circle period, staff continued to stay in touch with other participating congregations and send reminder emails in October, November and December. Some congregations dropped out at this point due to lack of time, energy, focus or commitment. Staff also offered informal one-on-one consultations with congregations on request.

The program ended its UUA involvement in early February 2015. Participating congregations were encouraged to continue with their outreach work, and UUA staff offered to serve as informal consultants for participating congregations in the future.
Discussion and Lessons Learned

The initial excitement among congregations about this project is noteworthy—over three times as many respondents signed up to participate as had been originally predicted. This illustrates the healthy appetite among UU leaders for outreach in general, and for learning how to use the UU brand identity in particular. It also demonstrates that the past few years’ effort among UU leaders to call attention to the shifts in American religious practice (e.g. the Congregations and Beyond initiative) has gotten traction. UUs across the Association see the world changing and are eager to find ways to respond. It is equally clear that no individual or congregation has a definitive answer of how our faith should move forward, and that congregational leaders will need ongoing support for developing their responses.

LESSON LEARNED - Given the obvious interest, the UUA should continue to partner with congregations to help local leaders develop effective strategies for faith outreach in their communities and better use of the UU brand identity.

“This process has been very effective for our congregation. It gave us the structure and tools to begin reaching out for new members, something we have not done for a long time. It has provided us with new ideas, good feelings about being a UU, and motivated us to take action”

— Participant Quote

The combination of the study guide and direct UUA support motivated congregational members and staff to invest in outreach for their congregations. The invitational approach of the project was key in this regard; rather than relying on UUA staff to create a pre-defined strategy (like a typical curriculum field test) or for congregations to identify strategies all on their own (like an open contest), the hybrid project took suggested approaches from the UUA and helped congregations explore them in their own context. Additionally, the connection participants experienced through learning circles was valuable for tackling the challenges that emerged during the program.

LESSON LEARNED - An invitational approach, coupled with a learning circle structure for participant connection, should be repeated for future outreach projects.
This program explored a major paradigm shift for participants, moving from internal goals or ideas (e.g. we would like to grow) to consider external perspectives (e.g. what does our community need?). The study guide activities asked participants to think in terms of audiences, and to get specific about who those audiences are, how they feel and what they want. For some participating congregations, this shift was hard. Many had even done recent work with strategic planning or visioning, and had a good sense of their internal goals. However, examining congregational goals in the context of the wider community’s perceptions and callings was more challenging.

Some congregations were able to be very precise about the niche audience they sought, while others remained at the broad community level. Even among those who identified a clear niche, sustaining congregational commitment through the process required ongoing attention from local project leaders. There was also great variation in the skill set of congregational leaders for reaching their niche audiences through event planning, social media, advertising and community promotion. The UUA could have provided better suggestions or clearer options for outreach projects as part of the study guide, giving examples of what an effective niche would be and how to translate that into an event and communications strategy.

**LESSON LEARNED** - In the future, the UUA should develop integrated approaches for outreach to specific niches, which congregations can easily use and adapt.
Conclusion

The outreach beta-testing program succeeded in its goal of learning which supports congregations need in order to use the UU brand identity and to develop broader outreach strategies. While the program started out more narrowly focused on the UU brand identity elements, participants’ comments showed that these elements could be most effective when used as part of a broader outreach strategy.

Based on the results of the beta-testing program, the UUA intends to develop the following resources for congregational outreach:

- A revised version *Love Reaches Out* study guide based on detailed feedback from beta-testers
- A high-quality website template for congregations that uses best practices in web design
- Print and email templates that provide for engaging communication with current and potential members, integrating the UU brand identity with opportunities for local adaptation
- A set of recommended social media strategies tied to specific niches (e.g. which platforms to use, types of content to post, how often to post, etc.)
- Scripts, brochures and other tools for helping visitors and attendees connect community events with the congregation’s core mission
- A workshop at General Assembly 2015 which will address the beta-testing process, the UU brand identity and broader outreach strategies (will be recorded and archived online)

Finally, the UUA Outreach Team will pursue targeted audience outreach projects in the coming year. Building on the excitement in the field and carrying over the effective invitational approach, UUA staff will identify key clusters of congregations to partner with in exploring structured strategies for specific target audiences (e.g. young progressive activists). This may be in concert with smaller explorations in tactics like Google AdWords or Facebook viral promotion.

*For more information on this report, contact the UUA Outreach Team at outreach@uua.org.*
### Appendix

Completed congregations’ niche audiences and outreach projects

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<thead>
<tr>
<th>Congregation</th>
<th>Niche Audience</th>
<th>Project</th>
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<tbody>
<tr>
<td>Granite Peak UU Congregation, AZ</td>
<td>Parents of children and teens</td>
<td>Family-friendly, multi-media Sunday services</td>
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<tr>
<td>UU Fellowship of Fayetteville, AR</td>
<td>Young adults and college students</td>
<td>Outreach to local university campus, website updates</td>
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<tr>
<td>UU Church of Berkeley, CA</td>
<td>Families interested in community service</td>
<td>Family-friendly food drive, Facebook promotions</td>
</tr>
<tr>
<td>Jefferson Unitarian Church, CO</td>
<td>Overall better communications</td>
<td>Website updates, restructuring visitor information on Sunday morning</td>
</tr>
<tr>
<td>UU Fellowship of Charlotte County, FL</td>
<td>Younger adults</td>
<td>New styles of worship for Saturday services, more use of Facebook</td>
</tr>
<tr>
<td>UU Church of Brevard, FL</td>
<td>Families and individuals in their 40’s-50’s</td>
<td>Host community events (e.g. movie night), website updates, more social media use</td>
</tr>
<tr>
<td>One Island Family, Key West, FL</td>
<td>Local island population</td>
<td>Increased UU presence at community events (e.g. matching T-shirts)</td>
</tr>
<tr>
<td>UU Congregation of Gwinnett, GA</td>
<td>Overall better communications</td>
<td>Website updates, Little Lending Library</td>
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### Appendix – Completed congregations, continued

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<th>Congregation</th>
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<tr>
<td>Cedar Lane UU Church, MD</td>
<td>Growing local immigrant population</td>
<td>Building community coalition to support recent immigrants</td>
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<tr>
<td>First Parish Church, Billerica, MA</td>
<td>Younger adults and families</td>
<td>Host community supper, other community events</td>
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<tr>
<td>First UU Church of Detroit, MI</td>
<td>LGBTQ people</td>
<td>Renew Welcoming Congregations status, website updates</td>
</tr>
<tr>
<td>UU Congregation of Las Vegas, NV</td>
<td>Families interested in Our Whole Lives sexuality education</td>
<td>Engage local community with school district debate over sex ed, continue family meet-up group</td>
</tr>
<tr>
<td>UU Congregation of Santa Fe, NM</td>
<td>Legislative advocacy, education for children &amp; teens, environmentalists</td>
<td>Legislative training, targeted Sunday services, becoming a Green Sanctuary</td>
</tr>
<tr>
<td>First Universalist Church of Rochester, NY</td>
<td>Local fans of affordable jazz music</td>
<td>Jazz Sunday service and events</td>
</tr>
<tr>
<td>Eno River UU Fellowship, NC</td>
<td>Overall better communications</td>
<td>Improving existing outreach programs (e.g. tutoring, food donations)</td>
</tr>
<tr>
<td>Unitarian Church of Montpelier, VT</td>
<td>Overall better communications</td>
<td>Website updates</td>
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