

Assimilation and Retention Committee

Exit Interview Procedure

- **Purpose.** The assumption behind an exit interview procedure is that by gathering information from those who have resigned their membership or otherwise dropped out of active association with Evergreen, we will discover patterns in the ways that the interviewees were dissatisfied. These patterns of dissatisfaction will in turn reveal weaknesses in the way that Evergreen supports its members and help us to strengthen the way in which our organization addresses and meets the needs of members, friends and other supporters.
- **Identification of Interviewees.** Initially attempts should be made to identify all those who have been dropped from the membership roles or were active as friends/supporters of Evergreen but have dropped out as during the last five years. A contact list should be developed with a broad sampling from each of the last five years. Beginning with the 2005-2006 church year, attempts will be made to create a contact list of at least 20% of those resigning or dropping out the preceding year. [Should former members who resigned due to relocation be interviewed?]
- **Exit Interviewers.** All contact with former members and formerly active friends (hereinafter collectively referred to as “former members”) for the purpose of establishing the opinions and feedback of former members for the A & R Committee shall be done by a trained Exit Interviewer working through the A & R Committee.
- **Exit Interview Content.** The A & R Committee shall approve the outline of a script for Exit Interviews. The script is not intended to limit the scope or depth of the interview, but to assure that certain information is collected for purposes of statistical analysis.
- **Confidentiality.** The Exit Interview notes shall be confidential. Reports shall be labeled by Year-Interviewer-# of Interview for that interview during that year. (e.g. 2005-Jones-#4) The interviewer shall keep a cross-reference of their interviews and the Chair of the A & R Committee shall have a copy of all cross-reference sheets. As reports are discussed the names of interviewees shall not be revealed except as necessary in the cross-reference lists.
- **Reports.** An Exit Interview Report shall be submitted to the A & R Chair for each Exit Interview and labeled as set forth in #5. The Report shall summarize the interviewee’s response to each element of the Exit Interview Script.

- **Contact with the Interviewee.** After compiling a contact list, the committee shall assign each former member to one of the available Exit Interviewers. The Exit Interviewer will send a letter in a form approved by the A & R Committee requesting the participation of the former member. The letter should explain the importance of the Exit Interview and either contain the script or summarize the kind of information that will be solicited. The letter should identify the assigned Exit Interviewer and offer the former member the opportunity to contact the Chair of the A & R Committee to have another Exit Interviewer assigned, as it may be possible that there are unknown issues between the former member and the assigned Exit Interviewer. The Exit Interviewer will follow-up with a phone call requesting a meeting with the former member. Let the former member know that you are not going to try to encourage them to return to membership, but only to better understand what led to their resignation. If the former member is reluctant to meet in person, a telephone interview will do, but it is recommended that the Exit Interviewer meet the former member either at the home of the former member or a public place such as a coffee shop. (It would be appropriate for the Exit Interviewer to treat the former member to a Latte or Cappuccino.) [If the former member is married to another former member do you talk to them together or separate interviews?] Be there on time, with a script and pen.
- **Conducting the Interview.** Begin by thanking the former member for taking their time to help Evergreen once again. Explain a bit about the process and how the information will be used. Explain the confidentiality of the anonymous reports. The role of the Exit Interviewer is to listen. You will need to guide the conversation through all the information requested by the script, but your primary job is to be attentive to what the interviewee is saying. It is critical that the Exit Interviewer be non-judgmental. If the former member makes negative comments about Evergreen or someone you know, **do not** become defensive, offer excuses or argue with the former member. You need to honor and cherish the perspective you are hearing, especially if it differs from your own. If the answer you get is that the former member was “too busy”, try to get behind this “easy” answer. Being “too busy” is a statement about priorities. Find out why the priority of Evergreen in their lives was lost. What needs remained unfulfilled? What expectations were not met? What were the disappointments? The betrayals? What led to a gradual loss of interest? Take notes. Make sure all the elements of the script are discussed. When the interview is over thank the former member once again. Let them know that Evergreen appreciates their candor and we will take all of their comments seriously.
- **Analysis.** To the extent possible, the A & R Committee will compile the information gathered by reports into a database allowing interested parties to

retrieve data sorting by different categories such as date, level of involvement of the former member or length of membership of the former member. The Committee will review the data looking for trends, patterns or isolated incidences in Evergreen's support of members that could be strengthened. From time to time as the committee identifies weaknesses in Evergreen's support of the membership, the committee will report to the board. The report to the board should enumerate the identified weaknesses, and, if possible suggest changes that may strengthen Evergreen's response to the needs and expectations of the membership.

Exhibit A - Exit Interview Letter Sample (Based on Berkeley Church)

Dear _____:

My name is _____, and I am the chair of the Assimilation and Retention Committee of the Evergreen Unitarian Universalist Fellowship. Our committee is trying to better understand why people join Evergreen and, equally important, why they left.

As a former member, you are in a unique position to address both questions. We would be very grateful if you would be willing to talk to _____ (name of interviewer), one of our committee members sometime during the next couple weeks. We will be asking the following questions:

- What attracted you to Evergreen? Why did you decide to join?
- Did you feel welcome at Evergreen? Why or why not?
- Why did you decide to leave Evergreen?
- Have you found another church home yet? Which one?
- How could we have responded to your needs better?

If you would prefer to be contacted by a committee member different than the one I have mentioned, please let me know at (Contact Phone #)

We sincerely appreciate any insight you might provide. Thank you.

Sincerely,

Assimilation and Retention Chair

Exhibit B - Exit Interview Script

Evergreen Exit Interview Questionnaire

Report Identification _____

Year-Interviewer-# (example 2005-Jones-#4)

Date:

1. Greet former member and thank them for participating. Ask if they feel comfortable with the process. Answer any questions and the process.

2. Statistical Information:

a. Male or Female

b. Age by decade 0 1 2 3 4 5 6 7 8 9 10 (Circle One)

c. Year first became active in Evergreen _____

d. Year of resignation (significant activity) _____ (approximate)

e. Number of years of membership _____

f. Involvement lever with Evergreen rated on scale of 1-5 with 1 representing someone who shows up on Sunday Morning, 3 representing some committee or other responsibilities and 5 representing a former board member or equivalent involvement. 1 2 3 4 5 6 (Circle one)
Describe some of the types of involvement

g. Number of children who attended R/E? 0 1 2 3 4 5

3. What first attracted you to Evergreen?

4. Why did you decide to join?

5. Did you feel welcome at Evergreen? Yes _____ Why? No _____ Why not?

6. Why did you decided to leave Evergreen?

a. Do you feel that Evergreen has let you down in some way?

b. Follow up. Did the priority of Evergreen shift in your life? What was happening?

7. Have you found another church home yet? Yes___ Which one? No _____

8. In thinking back, how could we have responded to your needs better?

9. Are there aspects of Evergreen you found fulfilling or continue to miss in your life? What?

10. Is there anything else we should know to help make Evergreen more responsive to people?

11. Would you recommend Evergreen to a friend or family member? Yes _____ Why?
No _____ Why not?

12. Is there anything else about Evergreen you would like to mention?

Thank the former member and let them know we will be seriously considering all of there comments.

August 23, 2006

Dear Members of the EUUF Board of Directors:

The EUUF Committee on Our Community respectfully submits to you the results and summary with recommendations of our work over the past year as part of the retention of members in the Fellowship. We wish to provide you with this information in a timely manner for your annual retreat this weekend and look forward to meeting with you during a monthly Board meeting in the autumn to discuss this in depth and answer your questions in person. At that time we also wish to share with you our plans for continuing this process.

Enclosed please find a five page document containing the survey questions with analyses of each question's answers. Additionally a two page Final Report with Recommendations is attached.

We eagerly look forward to your response and acceptance.

Sincerely,

Michelle Valentine
Committee Chair

Diane Brooks

Paige McKeague

Michael Mallory

Jo Munnich

FINAL REPORT AND RECOMMENDATIONS ON THE EXIT INTERVIEWS CONDUCTED BY THE COMMITTEE ON OUR COMMUNITY DURING 2005- 2006 CHURCH YEAR.

PURPOSE:

The purpose of this survey was to discover any common themes in the reason people leave EUUF. The Committee on Our Community feels that if we recognize and address the reasons for leaving, we could increase the retention of our members.

METHOD:

In the fall of 2005 the committee created a survey tool and implemented the survey process. The surveys were conducted face-to-face and by telephone. They were done over the fall and winter of the 2005-2006 church year. A list of 81 people who no longer attend EUUF was compiled from 2002-2005. Of the 81 people identified 23% were interviewed. Some of the individuals interviewed were randomly selected while others were specifically selected.

SUMMARY:

Overwhelmingly the reason people joined EUUF was the people/community. The interviewees unanimously felt well received and welcomed by the membership. Our ministers are also important ambassadors for the Fellowship. Who the ministers were and how they were perceived by the interviewee influenced their experience at EUUF.

The persisting value of the people/community at EUUF was apparent both in responses focused on joining and those focused on separation. The people/community was the highest-ranking response to the question requesting what first attracted the member, and was by far the highest-ranking response to the reason for joining. The importance of the people/community persists through out the responses as indicated by question 9. In that question more than 50 %of the respondents indicated that they miss or found the people/community to be fulfilling.

The most frequent response to the reason for leaving had to do with issues with a past minister. The most frequent response to the question about better meeting the needs of the individual identified concerns over the minister, sermons and worship. This same issue is repeated in question 13, which ranked disappointment or disillusionment in the member's journey of spirituality and/or personal growth as the number one response.

Significantly most of the interviewees said EUUF had not let them down. Of those who felt the Fellowship had let them down there was a theme of isolation, of not being reached out to or

accepted as an important part of the congregation. There were some individuals who left because they felt one of their deep values had been violated. There was an accusation that some of the members did not “walk the talk,” living up to the UU values and principles. Interestingly, 89.5%, said they would and have recommended EUUF to others.

Overall the key to attracting and retaining people to EUUF is “we the people” of the church, both the congregation and the minister. There was mention of sermons, intellectual stimulation, spiritual growth and personal growth, all of which contributed to the interviewees experience at EUUF. Ultimately it appears to come down to the people/community of EUUF. To retain members we need to pay attention to our members and recognize when support or a deeper connection is needed. Invite involvement but not make it mandatory for being part of us. We also need to allow people to rest, the involved person may need to back off from involvement and still want to remain a member of EUUF. Our challenge is to recognize this and be aware that sometimes people have a hard time saying no. The health of our community is not only what attracts new members; it is what holds us together.

RECOMMENDATIONS:

1. Provide a mechanism for all members of the congregation to alert the Committee on Our Community when they realize they have not seen someone for awhile.
2. Design and implement a practice of contacting attendees who have not been seen for three months.
3. Develop and implement a system of exit interviews.
4. Publish the results of this survey to the congregation and to those who were interviewed.
5. Communicate the importance of a vibrant and supportive Adult R/E community.
6. Communicate the importance of an active and sensitive Committee on Ministry.
7. Provide a safe and comfortable place/mechanism for those who feel disenfranchised to have their concerns addressed, providing an alternative to leaving.
8. Increase awareness of group dynamics and community health at all levels of the organization.

EXIT INTERVIEW DATA

STATISTICS OF THOSE INTERVIEWED: QUESTIONS 1 & 2

INTERVIEWS:

A total of 19 interviews were conducted:

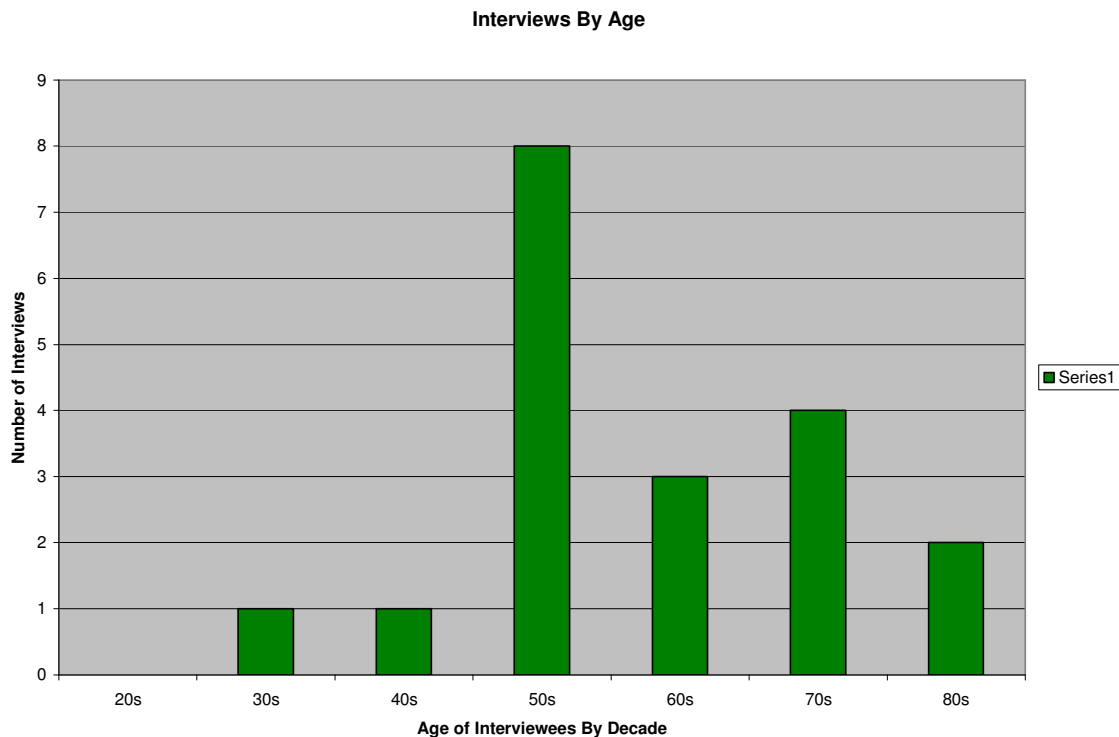
11 of the interviewees were randomly selected from a list of individuals who had not recently attended EUUF.

8 of the interviewees were individually selected by the committee to be interviewed.

INTERVIEWEES BY SEX:

11 Females

8 Males



YEARS OF MEMBERSHIP:

201 years for an average of 11.8 years

INVOLVEMENT WITH EUUF:

Each interviewee was asked to rate their involvement at EUUF on a scale of 1 to 5, with 5 being the highest level of involvement. We found involvement of the individuals interviewed to be high at an average of 3.89.

NUMBER OF CHILDREN WHO ATTENDED RELIGIOUS EDUCATION:

Correlating to the average age of the interviewees, there were only 13 children involved in RE, 3 of these represented grandchildren of the interviewees.

EXIT INTERVIEW DATA

QUESTION 3: What first attracted you to EUUF?

Rank	Response	Number of Responses
1	People of EUUF/Community	12
2	Openness of ideas/liberal approach/Spirituality	7
3	Prior UU Experience/UU Principles	6
4	The Minister	4
5	Intellectual Stimulation/Sermon Discussions	4
6	Social Justice	1
7	Choir	1
8	Children's RE	1

QUESTION 4: Why did you decide to join EUUF?

Rank	Response	Number of Responses
1	Community/Home/People	16
2	To Support the Organization	3
3	UU Principles	3
4	Intellectual Group	2
5	Progressive ideas of the church	1
6	Social Justice focus	1
7	Approach to Christianity	1

QUESTION 5: Did you feel welcome at EUUF?

100% of the interviewees answered yes to this question. There were 13 responses that they felt welcome from the start. 2 interviewees stated that they felt welcome at first and the feeling of welcome faded as time progressed.

QUESTION 6: Why did you leave EUUF?

Rank	Response	Number of Responses
1	Issues with one of more past ministers	6
2	Moved away	5
3	Wanted more spirituality/less "liturgy"	3
4	Disillusioned with leadership's values; some board members don't "walk their talk"	2
5	Burn-out or disinterest in helping with EUUF activities	2

EXIT INTERVIEW DATA

QUESTION 6A: Do you feel EUUF let you down?

Yes	4
No	13

Rank	Response	Number of Responses
1	Nobody reached out to people leaving	1
1	Meetings cancelled without informing me	1
1	Didn't get support in times of need	1

QUESTION 6B: Did the priority of EUUF shift in your life?

Rank	Response	Number of Responses
1	Job or family conflicts or issues	5
2	Values/principles conflicts or issues	4
3	Spiritual meets not being met in church	3
4	Moved	2
5	Minister changed/not worth the trip	2

QUESTION 7: Have you found another church home yet?

Yes	5
No	14

Of those who answered yes to this question, 4 are attending other UU churches and 1 is attending Quaker Meeting.

QUESTION 8: In thinking back, how could we have responded to you needs better?

Rank	Response	Number of Responses
1	Liked/did not like minister, sermons, worship	9
2	Support spiritual search/personal growth	3
3	Follow up soon when people not seen	2
4	Allow to be involved at level of involvement desired, allow to change level of involvement	2
5	Ministerial visit	1
6	Improve esthetics	1
7	Become larger church	1

EXIT INTERVIEW DATA

QUESTION 9: Are there aspects of EUUF you found fulfilling or continue to miss in your life?

Yes	17
No	2

Rank	Response	Number of Responses
1	Sense of Community	10
2	Intellectual Stimulation	3
3	Minister's Sermons	2
4	Children's RE	1
4	Choir	1
4	Adult RE	1
4	Social Justice	1

QUESTION 10: Is there anything else we should know to help make EUUF more responsive to people?

Rank	Response	Number of Responses
1	Interpersonal Relationships or Group Dynamics need improvement	4
2	The minister or lay leadership is ineffective	3
3	Evergreen should be more accepting of diverse groups	2
4	Adult R/E should be focused on personal growth, not fellowship	1
4	Committee work is too frustrating	1
4	The Ministry should focus more on practical life issues	1

QUESTION 11: Would you recommend EUUF to someone else?

Yes	17
No	2

Rank	Response	Number of Responses
1	I (we) did	6
2	Yes, wonderful community; because of good things; great place; absolutely, good fellowship;	4
3	Yes, (no more explanation)	3
4	If I knew someone's belief system would be compatible	2
5	Treated respectfully, no newcomers would be left alone	1
6	But not when I left, because of cliques	1

EXIT INTERVIEW DATA

QUESTION 12: Is there anything else about EUUF you would like to mention?

Rank	Response	Number of Responses
1	No	4
2	It's a wonderful organization; if you are new to the area people can find a connection via UU; think fondly of Kurt, Mike Mallory and Ann Veining Vining	3
3	Can Evergreen afford a minister who will stick around	1
4	When it comes to growth, do the things we want to do, not just what might attract others	1
5	If I moved back to Everett, would come back to EUUF	1
6	Church based on rational humanism is doomed to failure	1
7	Liked music, choral, instrumental, sitting in circles, inclusiveness	1
8	Liked camaraderie, liked stimulating sermons, would feel embarrassed to return to EUUF	1
10	New Yea's Eve parties, retreats, theology of play	1
11	Need people to make a personal connection beyond hellos at coffee. You'll never please everybody, no need to feel defensive about it, which is something EUUF does.	1

QUESTION 13: Any hopes or dreams that were not met?

Absolute Answers:

Yes	8
No	3

Rank	Response	Number of Responses
1	Hoped to find spiritual or personal growth, but that never materialized. This was a source of disillusionment.	4
2	Some said they felt they already had addressed this in their other responses.	4