

Report to the Board of Trustees
The Unitarian Universalist Congregation in Westport
for the 4/16/24 meeting
Rev. Alan Taylor

Status of Shared Transitional Ministry

Because Rev. Terasa Cooley was unable to join us in person in late March, the Transforming Conflict Team pivoted and provided a session to embody the first part of her work. I received a lot of positive feedback about her sermon and the gathering that followed, while some members expressed the hope that her approach will be explored more fully. This will occur in depth when Rev. Cooley returns the weekend of October 6.

Policy Reflections

Given that the Board will discuss the Budget this month, I want to offer up my philosophy of budgeting. In my view, budgets are moral documents. A budget represents the values of the institution. I have always encouraged congregations to seek to give away 5-10% of their budget—and you currently give away about 5% through your donation to the UUA, the significant Share the Plate totals, and the funds you provide to committees of the Social Justice Council that directly support the work of partners.

I applaud the Board for taking the bold step of planning to balance the budget over the last four years with unrestricted endowment funds. Because of unexpected income and frugality by all over the past three past years, those funds were not needed. This year likely will be different but at a degree that the congregation can afford over a few years to get through this transition period and re-build its foundation.

The greatest challenge the congregation faces regarding the budget is that the current staffing pattern (which is already much slimmer than a decade ago) costs you \$575,000 in recommended budget. (I don't include the \$18,000 for contractors for A/V, IT, website, or legislative advocacy.) Ideally, the pledge base would cover this. Until it does, a balanced budget will require unrestricted endowment funds. Doing so may seem anathema to some but it maintains a vision for growth as uncomfortable as this can be. Obviously this cannot become a habit over several years, but when it comes to reflecting on how to fund the mission, committing funds that are available is wiser than a focus on saving money.

In the 2023-24 budget, there is \$20,000 earmarked for “marketing” which I understand can be used for redesigning the website. I have spoken with three interim ministers who navigated a website overhaul during their ministries. The question is whether to use funds earmarked in the current budget or put funds into next year's budget.

I encourage the conversation about the budget to hold front and center the Mission and Ends of the congregation.

Mission

The Unitarian Universalist Congregation in Westport is a diverse and welcoming religious community, free of creed and dogma, and open to people of all backgrounds and beliefs.

WE INSPIRE and support individual spiritual growth.

WE CONNECT through worship, music, learning, and caring ministries.

WE ACT in the service of peace and justice.

Inspiration: investing in a full time Transitional Minister, a full time Faith Formation Lead. Maintaining a strong music program with endowment funds and special gifts. You are committing to holding the vision front and center.

Connection: This budget includes some training for intentional relationship building which will begin with the social justice council. Your Faith Formation Lead has been cultivating relationships. The Soul Matters program has been doing the same.

Action: Although the Social Justice Council and its teams provide most of the opportunities to act, the currently proposed budget doesn't fund much. In this second budget, funds will come primarily from Voices Cafe reserves, the Wortheim Fund, and the Jan Park Fund. There are funds for a few speakers, relational organizing training, and very limited charity work if the Social Justice Council chooses to prioritize legislative advocacy. Because this congregation is best situated to cultivate a UU State Action Network, I recommend that David Vita's proposal be countered with a clear focus on supporting that development.

One possibility to consider: increasing the amount given to social justice and charity organizations by sharing the plate more frequently—even every Sunday. It is my experience that nothing grows a congregation more than committing the totality of every Sunday offering to organizations outside the congregation. Generosity breeds generosity. Newcomers marvel at such a bold move that clearly aligns the congregation's actions with its values—and typically pledge more, knowing that the operating budget is funded primarily by pledges.

Ends

1.2.1 **We embrace** a culture of diversity, inclusivity, and tolerance, where we treat each other with loving kindness and mutual respect, working together to resolve any conflicts with love and compassion.

This month, many congregation members have become aware of the UUA's proposal to reshape our Association's commitments by refashioning the Principles and Purposes. A broad range of feelings exists from enthusiasm to dread to finding the whole conversation irrelevant. I have intentionally engaged with the Transforming Conflict Team, the Chaplains, and the Social Justice Council in creating space for people to share differing perspectives.

1.2.3 **We celebrate** lives of generosity and responsibility sharing our time, resources and talents to sustain our vibrant religious community. 1.2.4 **We become** a financially sustainable, engaged, growing Congregation comprised of all generations.

As of April 10, 131 households have pledged \$455,500. In the current year's budget, 189 pledged \$482,000. Of the 40-50+ households likely to pledge, most likely will be less than \$1,000. Perhaps we will meet our goal of \$500,000 of pledged income, but the currently recommended budget uses the number \$470,000 to account for unpaid pledges.

The current draft budget for 2024-25 includes nearly \$600,00 for staff expenses. The increases stem from the 2.5% increase in salaries, the congregation's portion of my family medical benefits,

Sue informs me that \$39,500 has been pledged by 7 members. Several households who have indicated that they will give have not yet made known their gifts to me or Sue.

I commend Steve Grathwohl for his tenacious badgering of Church Mutual after what appeared to be a flat-out denial of our cyber security claim. Thanks to his efforts, a \$10,000 reimbursement shall be received.

Governance Process Policies

Regarding fiduciary committees:

Regarding Personnel, the HR Team has helped me craft more helpful job descriptions that I will use to identify annual goals. I currently meet with my direct reports weekly. I also meet with Rev. Ed Thompson collaboratively each week.

Currently only Elena Rockman-Blake and Sam Somashekar serve on the Year Round Stewardship Committee. I welcome recommendations of who to request to serve on it.

Executive Limitations

3.2.2. (The executive shall not) Fail to establish, publicize and follow written policies for processing Congregant grievances and suggestions.

The Congregation can cultivate stronger feedback loops for the staff, ministers, and program leaders. At present, people often either complain or contact a board member about what they're unhappy about. As the board provides guidance through policy and monitoring Ends, there is ample opportunity for feedback. However, a question has come to me from two different sources: how does the senior minister receive suggestions and constructive feedback? Currently the Transition Team provides suggestions and constructive feedback to the Transitional Senior Minister.

I will work with the Board, COM, Transforming Conflict Team, and Rev. Terasa Cooley to identify and implement processes that provide healthy feedback loops.

Facilities Issues

Projects currently being attended to:

- Meeting House ramp
- Joist/beam repair outside the tech room that was eaten out by bees
- Tree trimming and removal

Projects needing attention not currently being attended to:

- New signs on campus - where buildings/entrances are, where lift is, where nursery school is, where meeting house, etc....
- New signs around town (especially at exits)
- New sign on "circle" by road
- Care of the plantings/trees/bushes on the "circle" by road
- New sign for "special" parking spaces (like leading light and staff?)

A Building & Grounds maintenance team has yet to be developed.

Annual Meeting Preparations

June 9 is the annual meeting and the staff wish to know if there is any support the board needs for this day. Do you want to build time in for a meal? Would you like a food truck on site? A meal cooked by Jenna?

The preschool has a large tent for Friday June 7 that can stay up through Sunday. The preschool's director, Pat Radcliffe, is resigning this year. She has 35 years with the preschool, over 20 of which she has been the director. This is a huge change for them. Friday, June 7, a celebration of her service will be held and we have agreed to let them put up a tent for this—which we can use for our purposes on June 9. We must let them know soon.