

## **Board Report to Congregation Jan. 2019**

### **Stewardship Consultancy**

With the objective to assess congregational stewardship, our wish to build greater sustainability of our mission and goals, the Board hired Mark Ewert, a Unitarian Universalist stewardship consultant, to make recommendations on a path forward

Over the weekend of January 4 – 6th, Mark spent time meeting with leaders throughout our congregation: committees and teams in Worship and Music, Justice and Outreach, Caring and Belonging, Spiritual Growth and Learning, Finance, Endowment, Stewardship and Planned Giving, and our Ministers, Director of Operations and Finance, Family Ministry, Facilities Manager and the Board. Over the lunch hour, all members of the congregation who wanted to participate, with a special emphasis on newer members, were encouraged to meet with Mark. Over 50 people were part of that session. In total, Mark met with about 130 people. The weekend schedule is attached at Appendix A.

Here are the **major findings** from Mark Ewert's report:

**Our strengths:** The First UU Society Burlington has:

- Dedicated and passionate members who are confident the Society can successfully navigate this time of transition
- A thoughtful and engaged board, which is particularly important during an interim ministry
- Notably capable staff and Interim Senior Minister
- Beautiful, historic, well-maintained, well-situated buildings and grounds. Remarkably, it relies on dedicated funding streams and needs little significant work. It is also a landmark of the city, with a strong identity aligned with its missions
- An unusually strong finance team
- Good programs for Caring and Lifespan Faith Formation, and many small group opportunities

**The challenges Mark notes:**

- Significant staff transitions, happening all at once
- Governance challenges that are leading to consternation among lay leaders – our society appears too small to fully support our current policy governance model, and may need to make adjustments and seek UUA consultation to fine tune our leadership structures.
- Improvements needed to annual giving drive and the long-term stewardship program
- More people needed in the kids and youth programs who are not actively parenting
- A history of weak membership systems and orientation to stewardship, which has improved with recent staff support
- Too few large amount givers to the annual budget, and too many modest amount givers

Here are some of the presenting issues and needs from a review of the documents Mark read and conversations he had in advance of the weekend with several Board Members, Rev. Susan and Christina Fulton, Director of Operations and Finance.

- Budget deficit
- Congregational giving levels not fulfilling budget needs
- Use of endowment funds to fuel annual operating budget
- Heavy workload

Here are his major recommendations:

- Provide more discernment materials for stewardship
- Make improvements to the annual drive
- Consider the building as a mission separate from staffing and programming for the congregation
- Consider UUA support for fine tuning governance structure

### **Transition Committee Report**

During the past several months, the Transition Committee and the Board of Trustees have invited members of the congregation to gather and talk about our strengths, culture, challenges and opportunities. This report summarizes what we have learned, and considers the implications as we move forward, embracing opportunities and addressing challenges as the strong community we are.

The Transition Committee sponsored several congregational meetings where small groups of people responded to four questions: (1) What brought you to FUUSB and what has kept you here? (2) What are the strengths of the society currently? (3) What challenges do you think FUUSB faces? (4) What are your hopes for the future of the congregation as it moves forward?

Here is a summary of what those of you who attended said:

#### **What Brought People to FUUSB:**

- Prior UU experience and UU values. People sought a community embodying those values for themselves, and their family.
- An “accepting” spiritual community.
- Social Justice and the opportunity for service.
- The minister or strong ministerial leadership.
- Significant events in the world, such as the 2016 election, or in their lives, for instance the death of a parent had been the motivating factor.
- Small groups, lay ministry, and music were also mentioned.

**Rev. Susan’s Conclusion:** These results held nothing surprising; the reasons included all those one expects in a Unitarian Universalist congregation of this size.

### **Strengths of FUUSB:**

- The strength of ministers, staff, and members.
- Openness to the larger Burlington community as well as social justice are perceived strengths of the congregation, as are diversity and intentional inclusiveness.
- The building and stewardship of the property show up as strengths, but do not dominate the response.

**Rev. Susan's Conclusion:** It was somewhat surprising that the building was not mentioned more as a strength, as is often the case in congregations with historical buildings. Clearly the ministry, witness, and programs of the congregation are more critical in motivating people to be here and participate than the material meetinghouse.

### **Challenges Facing FUUSB:**

- Perceived inadequacy of financial resources.
- Lack of widespread, updated use of technology.
- Lack of diversity.
- Perceived weak relationship with UUA and a reluctance to draw on its resources.
- Instability in Religious Education/Family ministry.
- Faulty communication among groups within the congregation.
- Need for greater awareness of the responsibilities of membership.
- Anxiety about how to avoid "burning out" another minister, especially in the face of inadequate financial resources.

**Rev. Susan's Conclusion:** While there is awareness and anxiety that the Society faces financial challenges, only a small percentage of people have seen the shape or dimension of those challenges, or their historical reasons. In addition, people haven't clearly absorbed the way the role and administrative responsibilities of minister have changed and grown, how that coincided with governance changes, and why those changes were important. There needs to be education on all these fronts.

### **Hopes for the future:**

People's hopes for the future run a very wide array from growing the congregation to financial stability and increased giving; from changing the sanctuary to create more flexible worship space to having better performance space; from greater communication and connection among members to a greater presence in the community. Other responses included different kinds of worship, expanding leadership pull, a formal volunteering process, and increasing strength of the congregation while recognizing the limitations of any minister. In some of the groups appropriate staffing to avoid burnout of both volunteers and staff was considered important.

### **Closing Perspectives and Opportunities:**

There are several themes that emerge from both the Transition meetings and the early January time with Mark Ewert. They are:

- We have a strong and capable community!
- Our staff faces a very challenging workload, which may contribute to turnover, but may also be a point of organization to engage volunteers and congregational involvement.
- Re-thinking some community structure is an important opportunity, and volunteer management and leadership development programming is recommended.
- Our financial status is very strong in some areas, especially concerning the support of physical spaces -- our meeting house. We have the opportunity to specifically address our financial needs for a stable staff and senior minister, and perhaps push through and find support for two ministers.
- Stewardship is both a challenge and great opportunity for our congregation.



**Appendix A**

**Next Steps Weekend  
 Consultant: Mark Ewert**

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**First Unitarian Universalist Society of Burlington  
 Schedule – January 4-6, 2019**

<b>Friday Jan. 4th</b>	
6:00 - 8:00 PM	Meeting with Interim Senior Minister and the Board
<b>Saturday Jan. 5th</b>	
8:00 - 9:00 AM	Facilities Manager and the Property Committee
9:00 - 10:00	Social Justice and Outreach Groups
10:00-11:00	Director of Operations and Finance and Finance/Treasurer and Endowment Investment
11:00 -12:00	Stewardship and Planned Giving Committees, Director of Operations and Finance
12:00 -1:15 PM	Lunch open to all members; newer members and youth particularly invited. Developmental Assistant Minister for Pastoral Care and Membership attends
1:15 -2:15	Care Network, Membership, Welcoming Ambassadors, hospitality Team, Developmental Assistant Minister for Pastoral Care and Membership
2:30 - 3:30	Lay Lead Groups: Women’s Alliance, Women’s Spirituality, Labyrinth, Coffeehouse, Garden group, Healthy Congregations, Flower Power, Safety Committee, Technical Committee
3:30 - 4:30	Worship Associates, Music Committee
4:30 - 5:30	Youth Ministry, Theme Circles, Chalice Circles, Developmental Director of Family Ministry, Children’s Religious Education Lay Leaders
<b>Sunday Jan. 6th</b>	
9:00 AM	Attend First Worship Service
11:00	Attend Second Worship Service
12:30 - 2:30 PM	Debrief Meeting with Board of Trustees, Stewardship Co-Chairs, Interim Senior Minister