

Report to the Bellingham Unitarian Fellowship Board of Trustees
From the RE Gift Committee
December 15, 2018

Committee Members:

Beth Nyblade, Chair
Ann Lackland
Roz Reynolds
Carl Nyblade
Liam Reynolds
Livi Lackland Henry
Rev. Paul Beckel, Ex Officio

Meetings held: 9/23/2018, 9/30/2018, 10/7/2018, and 10/21/2018

CHARGE: Provide the following to the Board of Trustees by December 15, 2018:

1. Specify desired outcomes
2. Identify steps toward those outcomes
 - a. RE expenses, including
 - i. ordinary annual RE program
 - ii. new RE program initiatives (activities, materials, or equipment)
 - iii. RE volunteer training/congregational consultants
 - b. And, as vital context for determining what is realistic overall at BUF
 - i. Required increases in pledge income specifically devoted to RE
 - ii. Required increases in pledge income for everything else
 - iii. Non-RE payroll, other expenses, and major long-term building maintenance
 - c. Rationale for specific spending decisions, and their timing
 - d. Numerical assumptions (eg number of hours per week, per employee, inflation, percentage of UUA salary & benefit recommendations....)
3. Create a process for annual review of this plan
4. Create a process for unexpected changes to the plan

Goals of the RE Program / Desired Outcomes of the Gift:

Sustainable growth in the RE program:

Have people stay and stay engaged

The children and youth will feel they belong / have a sense of community here

Participants will give service and be inspired to give service

The OWL program will be expanded

The RE program will engage the whole family

Participants will experience moments of awe and wonder

All children will be able to identify the principles that describe what it is to be a Unitarian

Newcomers will continue in the program. We will retain members

We will have a menu of service projects available on Sundays

The kids will feel excitement in doing things together that are spiritual and memorable

The kids will learn new skills doing service together

There will be a vibrant youth ministry with younger, maybe hired, youth leaders

We will start with practical goals

Kids will have a voice in areas that concern them

We will have enough adult leadership so older kids will not need to take care of younger kids during joint projects

Kids will have super-interesting conversations. Maybe youth chalice circles

Each age group will have its own identity and a critical mass

We will have 25% as many kids here every Sunday as adults.

Current Status:

Four kids in high school group, twenty participants in Sunday RE

2018-2019 staff are all interim : Interim director/s, 2 part time RE assistants, 6 or 7 childcare providers, childcare coordinator

Program Learning Objectives 2018-19

BUF's Religious Education participants will:

- Identify the UU principles and how they relate to their own lives.
 - Establish meaningful relationships with those of diverse backgrounds and ages as well as her or his peers and feel connected to the community here.
 - Increase awareness of BUF's involvement with social justice issues in our community, how they relate to our UU Principles and how they can be an advocate for justice.
 - Identify, experience and help create moments of awe and wonder.
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Tables for Timelines and Budget Proposals

*Note: pdf and Excel files of these charts are provided as separate documents
The pdf puts the following on a single page. The excel file enables you to play around with the numbers, and see further background such as UUA recommendations*

Table #1: This table provides a proposal/actual outcome for expenses in the 2018-2019 interim year.

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
Interim Expenses							
Interim DLLs	19,056	-	-	-	-	-	projected expense
Interim RE Assistants	4,804	-	-	-	-	-	projected expense

Table #2: This table provides a proposal for year-by-year expenses for planned present and future staff:

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
Future Payroll							5% annual increase
DLL salary	\$19,000	\$52,766	\$55,404	\$58,174	\$61,083	\$64,137	Eligibility as of about April 2019. Figure is about 11% of salary 1 assistant, 10 hours per week, \$17 per hour, 40 weeks, as of 2019-20 4 teachers, 4 hours per week, \$17 per hour, 36 weeks, as of 2019-20 1 leader, 10 hours per week, \$17 per hour, 40 weeks, as of 2019- 20
DLL Retirement + LTD	\$1,104	\$5,804	\$6,094	\$6,399	\$6,719	\$7,055	
RE Assistants	\$4,420	\$6,800	\$7,140	\$7,497	\$7,872	\$8,265	
Paid Teachers			-	-	-	-	
Youth Leader(s)		\$6,800	\$7,140	\$7,497	\$7,872	\$8,265	

Table #3 This table accounts for the non-compensation professional expenses, year-by-year.

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
HR Non-Compensation							
Professional Expenses	\$2,000	\$3,000	\$3,000	\$4,000	\$4,000	\$4,000	
Payroll Taxes	\$3,617	\$4,557	\$4,785	\$5,024	\$5,275	\$5,539	

Table #4 This table gives information on proposed program funds and initiatives.

Other	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
Hiring/search process		-	-	-	-	-	
Training/Consultants for Congregation and Volunteers			-	-	-	-	
RE Program	\$3,760	\$3,873	\$3,989	\$4,109	\$4,232	\$4,359	3% annual increase
New Program Initiatives		\$10,000					
Total RE Expense	\$57,761	\$93,599	\$87,552	\$92,700	\$97,053	\$101,621	

Table #5 Here are the summary expenses:

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24
Total RE Expense	\$57,761	\$93,599	\$87,552	\$92,700	\$97,053	\$101,621

Table #6 Income projections

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
Income from Operating Budget							
DLL salary	\$44,000						
DLL retirement + LTD	\$4,840						
DLL Professional Expenses	\$2,000	\$57,966	\$57,966	\$57,966	\$57,966	\$57,966	static
DLL Payroll taxes	\$3,366						
RE Program	\$3,760						
Income (vs 2018-19) directed solely to RE	-	\$5,000	\$12,000	\$20,000	\$29,000	\$39,000	
Total Income	\$57,966	\$62,966	\$69,966	\$77,966	\$86,966	\$96,966	

Table 7 Summary of Remaining RE Gift

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
Reduction of RE bequest	\$205	(\$30,633)	(\$17,586)	(\$14,734)	(\$10,087)	(\$4,655)	remaining \$22,511

Note

Not included above: Health insurance, OWL training, Childcare & Coord, which are fully accounted for elsewhere in the budget. There will also be increased L&I (relatively small, and hard to calculate)

Table #8 The following table shows other demands on the BUF budget as we consider whether we can raise income for RE and for everything else simultaneously.

	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	Assumptions
Other Payroll	\$219,999	\$236,651	\$248,483	\$260,907	\$273,953	\$287,650	5% annual increase
Remaining Budget	\$190,502	\$196,217	\$202,103	\$208,167	\$214,412	\$220,844	3% annual increase
Major Maintenance (a new addition to the budget)		\$3,000	\$5,000	\$5,150	\$5,305	\$5,464	3% annual increase
Ministerial Transition			\$3,000	\$5,000	\$5,000	\$5,000	should have about \$30K avail.
Total non-RE expenses	\$410,501	\$435,868	\$458,587	\$479,224	\$498,669	\$518,958	
Increase to non-RE income (vs 2018-19)		\$25,367	\$48,086	\$68,723	\$88,168	\$108,457	
Increases to RE income, from above		\$5,000	\$12,000	\$20,000	\$29,000	\$39,000	
TOTAL Increase vs 2018-19 budget		\$30,367	\$60,086	\$88,723	\$117,168	\$147,457	
Year over year income increase required		6%	6%	5%	5%	5%	

Notes:

- "Other Payroll" Includes \$274,000 per 2018-19 budget, minus all salary, benefits, taxes, and other RE payroll above. Plus, in 2019-20, increasing membership coordinator to the full year.
- The % annual payroll increase needs to cover normal inflation + health insurance inflation + movement toward the UUA midpoint + movement beyond the UUA midpoint for staff with significant professional experience or years of service to BUF

Hiring Recommendations

Establish Payroll to hire up to:

- DLL Full Time at 90% of UUA midpoint for “credentialed, masters-level”
- Youth Leader 10 hours/week
- RE Assistant 10 hours/week

Create a process for annual review of this plan

- 1 The DLL will take responsibility for generating the statistics in How to Measure Outcome on a monthly basis. This responsibility may be delegated. Statistics will be submitted monthly to the RE Committee.
- 2 The RE Committee will compile and analyze the statistics generated above on a semi-annual basis.
- 3 The RE Committee and RE Staff will review the annual statistics and other data on an annual basis in March and formulate needed changes to the plan.

Create a process for unexpected changes to the plan

- 1 If unexpected positive or negative events or trends suggest a change is plan is necessary, in the judgment of the DLL and/or Chair of the RE Committee, they shall meet with the RE Committee to discuss these changes.
- 2 If the DLL, and the RE Committee have a consensus that changes to the plan are needed, these proposed changes shall be submitted to the Operations Team for approval (or to the Board, in accordance with Board Policies, depending on the magnitude of changes)
- 3 If changes to the BUF budget are necessary, these proposed changes shall be submitted through the ordinary budgeting process and submitted to the congregation at the time of the annual budget meeting.

Respectfully Submitted,

The BUF Gift Committee

APPENDIX 1

Notes re steps toward desired outcomes

(These were off the cuff brainstorming ideas, they are not intended to be recommendations/expectations)

How to measure growth?

Keep better data including on why people (kids, volunteers, staff) leave

Measure retention.

Measure in the following areas:

Increased number of programs associated with RE

Increased participation in RE

Increase outside participation.

Sustainable increase in paid staff

By measuring:

Number of BUF members

Number of kids registered

Number of kids in weekly attendance in RE

Number of total participants in RE

Long-term financial sustainability for BUF/RE

Number of programs that serve our mission

Harder to measure but important:

Growing religiously mature people

Preparing our kids to be adult UUs

Growth in character, skill, knowledge, depth, (from responses to Tandi's workshop)

Meeting needs of children & youth in the program better.

Renewed understanding/buy-in to vision of RE

Notes re possible changes to the RE program

(These were off the cuff brainstorming ideas, they are not intended to be recommendations/expectations)

Other possible expenses

- Leadership training
- Learning or community building trips or retreats
- Van, Food
- Major expansion of OWL, beyond BUF

More coordination/integration of RE within BUF

More outreach from RE to outside agencies and programs

Scholarships to UU UUSC camps for kids

Increase in numbers and diversity of programs

D&D

Youth Minister – leadership & dynamic energy

Special Retreat—cabin

Examples of inspirational leadership, rationale,

BUF Offer jobs to youth / Youth raise money for BUF

Cons, 2x a year

Possible partnership with Fairhaven College

Parent programs / Family programs

Retreats/workshops

Skill-building goals

APPENDIX 2

Notes from Workshop with Tandi Rogers

	FAMILY	SOCIAL JUSTICE	WIDER COMMUNITY	NATURE	WORSHIP	HOUR OF RE	SERVICE/ LEADERSHIP	FELLOWSHIP
<p>Faith Development</p> <p>Making meaning of, and finding purpose in life.</p> <p>To explore and articulate one's own theology.</p> <p>To feel a sense of belonging in a faith community and part of a faith tradition.</p>	<p>Community night dinners</p>	<p>Inspirational UU models/mentors</p>	<p>Be open to ideas/facts that will change world view. Listen and learn. Be able to empathize with others.</p> <p>Empathy, understanding & love.</p>		<p>By being immersed in a learning, spiritual growth and witnessing environment. The sermons of Peter Luton and Doug Wadkins. Many women mentors.</p>	<p>Visiting other denominations as a youth. Teaching youth group. Spirit play. My UU shaped children who's good work counters sin.</p>	<p>Behind the scenes acts of generosity to B'ham and BUF. Playing with preschoolers. Teaching RE, working as a team with some amazing UU women. My own challenges affect how I interact with UU community/theology and practices. Take action on my principles.</p>	<p>To be loving towards others. At BUF I feel loved and accepted and welcomed as I am; this what UU is about.</p> <p>Showing examples of kindness. All progressive values are under threat. BIG BOLD PROGRAM RE can grow to become a beacon for families in our community to foster all their values.</p>
<p>Spiritual Development</p>	<p>Unconditional love. Value & know about</p>	<p>Acting on the principles. Becoming a better</p>	<p>Listening deeply.</p>		<p>Hope for a better world. Worship</p>		<p>Musical message. Learn to argue without convincing.</p>	<p>Coffee House. Still learning to be UU</p>

<p>To cultivate individual and communal spiritual practices. To develop an alertness to the wonder and mystery of existence. To feel a connection to a larger reality. To experience the sacred through worship, ritual, wisdom of faith traditions and spiritual disciplines .</p>	<p>the interdependent web. OWL. Questioning , politics, ethics. Understanding people have other ways of being. Compassion & empathy OWL.</p>	<p>listener. Saying the covenant. Observing 7 principles in action. The covenant. Compassion for all. Observation. Participating in service projects. How to stand up for their views. Modeling by adults. How to be an activist. Acceptance of others. Learnt by watching adults. OWL teaches we are in charge of our own body. The dignity & rights of all people. Care for the earth. Be more queer affirming. Making injustice visible.</p>			<p>services. Songs. Belonging to the choir. Singing together especially holding on to an ever longer note of circle round for freedom. Thought provoking sermons that move me out of everyday work week.</p>		<p>Continue to be engaged even if you don't "win". Sometimes by negative example.</p>	<p>through RE, preschool/spirit play lessons, music and SEJC.</p>
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		Community partnerships. Community action.						
<p>Ethical Development</p> <p>To live out one's values. To have a moral basis for deciding right and wrong.</p>	<p>Know thyself. Identity is a spectrum they will know by hearing and learning the vocabulary they need.</p>	<p>Being part of a larger group response for social justice. Social justice. Collective voice.</p>	<p>OWL. Initiate actions and role models to enhance tolerance. Work in community on common questions. Engagement.</p>	<p>Caring for the planet and all BUFSter s using %100 renewable energy. Wilber. History of UU. Memes. Karen Armstrong.</p>	<p>XXX</p>	<p>Treat everyone well – learned from the youth & adults around them. To honor the religions of others – through RE. Teaching the 7 principles through RE and OWL. Forgiveness of others ways of doing/being despite so much change in staff/board/leadership. Embrace sexual diversity. OWL.</p>	<p>OWL. Respect and feeling inherently worthy/valued. Healthy relations team. Giving back to community. Teaching/sharing with others. Environmental values, small foot print. Critical thinking. Being held accountable. By example. Service, kindness, leadership, justice. Common cause. Working together to help our neighbors.</p>	<p>Community – we accomplish things together that we would be afraid to try on our own. Respect each person. Welcoming everyone. LGBTQ rights. Welcoming people no matter their gender or persuasions. Compassion for all situations & people. Watching the grownups and through practice. Respect for all others. By example, observing it at RE, church in</p>

								general, at home, among family members. Practices of self awareness learned through interaction with self-aware adults.
UU Identity Feeling you are truly a member of the UU community.	When I wanted an RE community for my kids.	Compassion for those who differ. Social action and being a welcoming congregation. Threat of human rights and inherent worth & dignity of everyone. Partnership space and \$ support for C2C.	Having peeps.	XXX	The covenant.	By teaching RE. Critical but compassionate thinking. Visiting other religions and service projects.		Dinners for 8. BUF preserves queer identity. Connecting youth to/with elders.

The Questions relating to each color:

- Blue** Write down the anecdote that was most powerful, most healing for you.
- Yellow** A child grows up in the congregation. What values do you want them to embody? What skills should they have acquired before they are launched in to the world?
- Pink** What values are at risk in the wider world?
What skills do our people need to develop, hone, practice to be the antidote?
- Green** How did you learn to be Unitarian Universalist?

APPENDIX 3

Roz' Goals for RE at BUF (In order of priority)

- Children and youth should feel connected to the community. They should feel a sense of belonging and acceptance, but also ownership and responsibility (stewardship). This is important in its own right, and also a prerequisite for everything else.
- Children and youth should find purpose in service. Our covenant where we say, “service gives it life. The happiest adults are those who had been raised to be useful. They grew up into independent adults who could take care of themselves and others, and give back to their communities. Seeking to be useful leads to more ‘happiness’ than seeking to be happy (which is self-indulgent.) An organization like BUF is uniquely positioned to teach and organize the kids into being of service, both within BUF and in the greater community.
- Children and youth should have access to as many of the OWL classes that we can reasonably offer. Again, this is something that we’re uniquely positioned to offer, and we should make the most of it.
- The RE program should facilitate the whole family getting their needs met. Children and youth should be sufficiently entertained/engaged by whatever is going on on Sunday mornings that they go willingly to RE, allowing their parents to go to services and get their spiritual needs met. Also, ideally, we wouldn’t ask parents to teach RE, because they are the ones that most need to get their wells filled up. We should also continue to offer support (such as childcare) so that parents can sing in the choir, join committees, etc.

Thoughts for how to achieve these goals (in no particular order):

- Grow the numbers, especially in the middle and high school groups, at least so there is critical mass. The prospect of seeing friends is probably the number one draw for most kids. (Note the chicken-and egg conundrum here...)
- Hire young, energetic teachers (ie, pay them). This would make for more engaging classes, more consistency (same teacher every time), and would free up the parents to go to the service.
- More action, less talk. Increase the number of service-oriented projects. Increase opportunities for volunteer work within the congregation, and without. Involve children and youth in the work end of worship: ushering, greeting, serving as celebrants, etc.
- Increase recruitment for OWL teachers, and funding for their training.