

Congregational Budget Meeting
March 3, 2019

Attending: Lisa Fuller, Harvey Johnson, Dorothy Long, Julie Williams, Charles Long, Linda Lobik, Beth La Fleur, Joanne Krettek, Terry Sundstrom, Dave Sarra, Mary Lou Elson, Jim McConnell

MEETING NOTES (prepared by Joanne, edited by Lisa)

Purpose of this meeting is to help everyone gain an understanding of BUUF's finances and to begin a discussion, gather questions and input, choose goals for the budget to accomplish

Ground rules for discussion presented

Began by viewing video: "Living Church, Dead Budget" April 2013 TED Talk by Victoria Weinstein

We don't have a history of our ministers speaking about money from the pulpit, but maybe we should be doing that (Julie)

Lisa purchased a package from a group called Soul Matters re: pledge campaigns and stewardship and will be sharing with Jim

Joanne: let's have Harvey submit a few words about the budget on a monthly basis for the weekly Announce

Jim's wife's church published finances in church weekly; father-in-law's church actually published individual donation amounts

Dave: Endowment isn't so large that we're living it up; we're not letting the dead lead; we get only slightly over half of our budget dollars from pledges; should we do more with fundraising? We could use more Fundraising Committee members/help.

Charles: UUs give much less than almost any other religious group, we've got that working against us. We don't want to push finances so hard that people decide to leave.

Beth: Need to make electronic giving more publicized, easier

Harvey: I'll no longer be Treasurer, I'll be President; we need to recruit a new Treasurer

Julie: Need to find a better way to hold meetings, 1:00 is very late, long day, especially for families with young children

Review of General Operating Expenses

- Electric expenses are trending up, UUA support formula changing

Expenses for Paid Staff

- Hoping to add a music director at 5/hours per week (\$3,900)

Duties of Paid Staff

In-Kind Donations

Review of Income Sources

Julie: Should we seek out additional building rental income?

Charles: if we do increase rentals, we need to keep in mind the costs on our end, e.g., snow removal, electricity, heat, delivering a key to the renters, etc.

Pie Chart of Income Sources

Year-by-Year Budget Comparison (Harvey distributed handouts and reviewed)

- Annual pledges have gone up by about \$2,000 per year; proposed income for current church year is \$24,027 based on pledges; projected based on actual YTD contributions is \$19,420
- If expenses and income stay as they are, we will be \$10,000 in the hole for the year

Harvey reviewed this year's pledge campaign plan

Mary Lou: What is a chalice lighter grant? Lisa explained. Harvey encourages others to become chalice lighters.

Mary Lou: Do we still advertise in the newspaper. That's how I first found BUUF.

Response: No, we dropped that, big expense for a small audience. More people are searching online now. Harvey submits to the HP a notice of movie night, one person came this last time based on the newspaper notice.

Beth: Several people she knows who don't attend have checked out our website

Julie: Do we need to stop doing summer services? We're so small. Can we afford it?

Dave: We can't afford NOT to have Sunday services and events. We lose people when those services aren't conducted.

Lisa: Staff provides significant value based on the expense

Charles: At last annual meeting, we approved funding for window replacement but that hasn't happened, parking area and driveway are going to need work, too.

Beth: Important to remind members what our paid staff do. If we want to continue to have workshops, etc. these things do cost money. Although teachers are volunteers, we have a paid director and paid child care.

Julie: Remind people of all the things we gain from the fellowship: ministerial outreach, workshops, relationships, etc.

Lisa: Another video (not shown at today's meeting) suggested thinking through what value you receive from the fellowship and comparing it to other costs, like going to see a movie once a month. Do I value

my participation in the fellowship more or less? Am I contributing in an amount commensurate with the value I receive? Let's also consider ways we can raise money externally.

Jim: Agrees there could be an opportunity to speak about money from the pulpit, have probably only done this once in 10 years.

Charles: Exceptionally well qualified staff even though we aren't paying them very much

NEXT STEPS

Pledge drive/Fundraising:

1. Announce 2019 pledge campaign—April 21 – May 18
2. Rev. Jim and Lisa will utilize Soul Matters 'Making Change' stewardship package during 2019 pledge drive
3. Communicate paid staff duties, benefits of BUUF membership and e-giving opportunities with congregation (including having bank or credit union issue a paper check automatically each month)
4. Include fundraising team participation on the annual pledge form (**UPDATE 5/23/19: we did not get this added. To volunteer for the fundraising team send a note to office@berrienuu.org**)
5. Introduce new ways to help members and friends *consider* their level of giving (**UPDATE 5/23/19: see Lisa and Harvey's Pledge Letter for more on this**)

Other Congregational Communication:

1. Recommend/require treasurer submit a few words about the budget or church finances for the Announce monthly
2. Provide congregation with more information about Chalice Lighters program (**UPDATE 5/23/19: visit [this link](#) to learn more about Chalice Lighters**)

Building & Grounds Improvements:

1. Appoint task force to assess driveway and parking field for repairs
2. Announce window replacement work day planned for second Saturday in June