

Executive Director s Report to the Congregation

FUUCA 5/3/2009

First UU of Austin has weathered the last six months of challenges well. Though much work remains before we emerge from the woods, we have already overcome obstacles that could have easily left us in a much less favorable position than where we find ourselves today.

At the operations level, we ve begun turning some attention to long-term improvements. At the top of the priority list we have projects that improve our efficiency and revenue stream.

The Last Five Months

Personnel changes and other extraordinary activity have limited office staff s ability to give attention to more than just maintaining basic operations and services. During this time of transition, the help of dedicated volunteers and the patience of many understanding members have allowed us to forge ahead without reducing or dropping any of our key activities.

Despite the challenges of the last five-months, we have made progress in some areas beyond day-to-day operations. These include:

- Hiring and basic training of new administrative assistant, Natalie Freeburg
- Beginning Data Systems Review Project (improving staff efficiency with better and/or more integrated software systems)
- Beginning improvement of Financial Reports
- Implementation of new, improved credit card processing system
- Improvements to some policies and procedures (tightening up, resolving ambiguities, etc)
- Cash flow projection report
- Security Task Force s first report (to present to the Board of Trustees in June)
- Beginning the process of making the whole rental process more efficient, better tracking, etc.
- Basic support to Stewardship s Spring Campaign
- Memorial Services Committee beginning to clarify basic staff responsibilities
- Bridgebuilder support
- Contingency Options Report
- Implementing processes for handling bounced credit card gifts

Detail on these and other issues appear in my monthly reports to the Board of Trustees.

Tip of the Hat

As I write this, it seems likely that the congregation will have given or pledged more than \$100,000 in additional revenue as part of the Spring Fundraising Campaign!

To contextualize this, in online discussions among UU administrators, I ve seen a dozen cases this week of UU churches making budget cuts, including reductions in staff wages, benefits, hours, etc.

So, the congregation's generosity, and the hard work of the Stewardship Committee, will allow your dedicated church staff to breathe a sigh of relief. It feels very good to know how much members and friends of the church value the programs, services, and activities that we provide.

Others in leadership, including trustees and members of the Finance Committee, deserve credit as well. They played an important role in helping the congregation in general understand the importance of raising our income rather than cutting those things that bring life and vitality to this community.

Overall, this result says something very good about this congregation. Your trust, support, and investment in this, our home away from home, will send a very positive message to potential candidates for the Interim Minister position.

Thank you all.

The big challenge

The office's great challenge remains maintaining a delicate juggling act in a system where day-to-day operations could easily absorb all of our time. My staff and I find ourselves managing four principal kinds of demands on our time:

- 1) Day-to-day operations
- 2) Band-aids on long-term problems
- 3) Managing expectations
- 4) Long-term solutions

I would like to dedicate serious time and resources to the fourth, long-term solutions, because it holds the promise of enhancing the quality and quantity of our work. The sooner we can get better tools, training, and processes in place, the sooner staff will be able to execute their current responsibilities better and to have the time to take on additional duties.

Ironically, managing the expectations has become an impediment to long-term solutions. I regularly receive requests to provide an immediate solution to a need or problem. Each person believes that their request needs full, immediate attention by staff. Not all requests constitute true priorities or emergencies. However, others are truly important issues and are something where, ideally, staff would have the responsibility to take care of them. In a handful of cases, the proposal does merit immediate attention by staff, even though such a response usually means diverting resources from dealing with long-term solutions.

The immediate solution generally means either adding to the workload of day-to-day operations or putting a band-aid on a problem. Even responding to half of the truly important requests this way would eliminate any possibility of identifying and implementing long-term solutions. Thus, it has become time-consuming to have to regularly justify to people why I've chosen to dedicate our limited resources to certain activities rather than the one they feel is most urgent.

I am not sure how much success I have had in communicating this dilemma to church leadership and volunteers, as I seem to be spending more and more time telling people why a staff response to their request will probably have to wait. One of my great challenges, then, will be finding a way for us to set appropriate expectations and break this cycle: we don't

have enough time to become more efficient and effective, but we could become more efficient and effective if we just had the time to do it.

The coming months

As much as possible, I hope to dedicate time and resources to improving our efficiency and revenue stream. Improvements in these areas today will bear the greatest fruits for us long-term in terms of financial health, member satisfaction, and the overall quality and quantity of services we provide.

Given limited time and resources, we can only undertake a limited number of new projects in addition to everything we already do for day-to-day operations. I will work with the Board of Trustees to identify worthy projects and prioritize them. They will likely include at least some of the following:

- Support for Stewardship and planning the Fall Campaign
- Support for the incoming Interim Minister
- Improving staff efficiency with better and/or more integrated software systems
- Improving building and property security
- Defining and providing appropriate support to the Memorial Service Committee, the Congregational Care Committee, and other church service groups
- Permanent procedures to handle incomplete pledges and bounced credit cards
- Improved room usage policy, forms, process, and (ideally) online access
- Fully improved financial reports (easy to understand) and the ability to generate them easily from our accounting software
- Office remodel to decrease distractions and increase efficiency
- Support for the Bridgebuilder and related processes

--- Sean Hale April 30, 2008