

Executive Director's Report to FUUCA Board of Trustees

May 16 – June 11, 2009

As things continue to settle down, new challenges appear. Specifically, there are dozens of high priority projects and hundreds of other important projects that my staff and I could (and probably eventually should) take on. Many of these projects have vocal constituencies and almost all do merit serious staff attention, support, etc.

Our challenge: we have the skills to do them, but we do not have the time to do everything at once. We must find a way to use our time efficiently and systematically handle the most important priorities first. We must exercise great care so that we do not spread our selves too thin. Most of these projects require concerted effort to get off the ground and many will require ongoing support over the long-term. So, we must choose wisely and have the support of leadership to allow secondary priorities to wait while we attend to the most important ones.

This is a good challenge to have.

Office & Staff

- Weekday Volunteers – Ann Edwards, Kathryn Govier, and Mary Jane Ford continue helping us regularly during the week as well, and Jeanette Swenson has also lent a hand. We're very grateful for their help. Other individuals continue to play important volunteer roles as well outside of the office.
- Sunday Volunteers – Barbara Denny, Mary Jane Ford, Betty Howard, Susan Bethke, and Ruth Marie continue volunteering in the office on Sunday morning. Barbara coordinates the volunteers. If this service is to continue, we will need to recruit a few more people to cover all time slots.
- Natalie Freeburg – Natalie received her first performance review in May after completing her first 3 months on the job. I am very pleased with her work thus far and expect even greater things in the future.
- Room Reservation Software – Our room reservation software, LOGOS, began failing us this year (losing reservations, allowing double bookings, assigning incorrect dates, etc.). John Franks helped us identify a fix that we hope will allow it to continue serving in the short-term. By the end of the year, however, we hope, with John's help, to identify software that will provide us additional functionality such as an online calendar (so people can check availability without contacting the office).
- Cross training with Jim – Jim and I continue cross training on his duties for an hour or two each week, as described previously. Over the last few weeks, I've been acquainting myself with the architecture and organization of our books in Quickbooks.
- Summer Schedule (closed Monday) – so far so good. Most people have been very conscientious about our new schedule. It has increased productivity and staff morale. Brent Baldwin reports that his requests receive faster responses now. We are not aware of the new schedule causing undue hardship or difficulty for anyone.
- Phone & Voice Mail – so far so good. Many have expressed gratitude that they can directly dial the extension they want, saving them time. Some of these same people, especially those with busy schedules, had previously felt obliged to engage in a

conversation with whoever answered the phone – something they also feel happy to do without. Natalie estimates that she may be saving 5-10 hours a week thanks to this change. We are not aware of this new process creating undue hardship or difficulty for anyone.

- Newsletter – our first in house printing, using our photocopier, of the newsletter happened with the June edition. This reduces our print costs. This coincides with a large transfer of newsletter delivery to the electronic edition (rather than mail). By reducing our monthly mailing from 200 to 30, we've dropped postage and printing costs even further. (People received prominent notice of this change in the April and May newsletters – they can still request to receive it by mail.)
- Summer Vacation -- I'll be out of the office from July 14-20 for a little R & R in Denver. I'll be sure to work out any contingency plans, before departing, with my staff and the executive committee. Sheila Gladstone and Lara Douglas have agreed to handle any urgent matters in case I cannot be reached over the phone (or if they require a physical presence).

Finances & Data

- Electronic Pledge Statements – Joseph Hunt continues developing a special COMS report that should, at least theoretically, allow us to begin sending pledge statements by email and to include a personalized note (not just the raw giving data). I'm not sure when this will all be up and running, and its not 100% clear yet that the technology will cooperate with us, but we have a reasonable chance of success on this within the coming months. Joseph is also helping us to develop some multi-purpose reports that should make it easier for us to do more work in house.
- Financial Reports – work continues to improve the financial reports. Luther is studying a new potential format for the balance sheet (based on a design by Stephan Windsor). I am working with Eugene Balaguer on a new potential format for the Profit & Loss (Income and Expense).
- Uncollected 2008 pledges – per recommendations from the treasurer, stewardship committee, and board, the office will make no effort to collect incomplete 2008 pledges.
- Uncollected 2009 pledges – I continue seeking resources in order for us to develop processes to handle incomplete pledges. I have begun contact colleagues at large UU churches.
- Credit Card Bounces – I continue to handle the bounces of credit card pledges. A few more months will make it easier to have a clear picture of the volume and nature of the work.
- Pledge Data Flow – the Stewardship Committee has assigned Sean Ramsey to work with me to review our pledge data flow before we begin the fall canvass. When I drew out the data flow for last fall, it filled 3 pages! I'm pretty sure we can come up with a more efficient way to get the information through the system.

Facility & Hardware

- Office Makeover – Bob Bethke hopes to complete phase one, the partitioning of room 8, during the week of June 15th. This will provide a discrete space for the photocopier, mailboxes, and supplies independent of office staff's work area. This, in turn, will

increase security (we have a lot of sensitive information in the office) and productivity (fewer interruptions for staff).

- Foyer HVAC – John Payne has begun receiving bids on new systems for the foyer. He still awaits at least one bid before making a final decision.
- Main Building HVAC – one of the HVAC units that serves the building from roughly the Gallery to my office has begun making puddles in the Janitor's closet. John Payne is on top of the situation.
- Recycling – First UU's recycling program has entered a form of limbo. I've been working with Lara, Luther, Natalie, and Ron P to sort out something. The contract we had with Austin Shred was cancelled by them (it had been an unhappy relationship for both parties). Unfortunately, no person or church group seems to have ownership for this project. I'd like to find a way for it to continue (since it's a no-brainer for our values) without it becoming yet another unfunded mandate for my staff. In the meantime, Luther is taking bottles and cans to Ecology Action and I'm taking paper home to my own bin.
- Grounds Contract Review – Elizabeth Gray has negotiated a 10% reduction in the fees for our mow and blow contract! This will save us \$600 over the next twelve months.
- Termites – Natalie discovered termites in the kitchen, building stalactite-like trails out of the ceiling. Orkin could not figure out where they were coming from, but did heavily treat the whole area around the pipes and foundation (most likely entry points). We'll look out for more trails.

Other

- Janet Newman's June Visit – I helped Janet to line up and coordinate her top priority appointments for her June visit. She is now handling any additional changes to her schedule.
- Top Priority Goals for Sean Hale – I will present a draft list of top priority goals to the BoT at their June retreat.
- Stewardship – under the leadership of chair Bill Edwards, planning has begun for the fall campaign, including the development of an inspiring theme (our 6/15 event will be a good start).
- Security Task Force – the Security Task Force has completed a first draft of its phase 1 report and Nell is working on polishing it. The report might be ready for presentation to the BoT at the July meeting. Dwayne Windham has joined the STF.
- Photos of Trustees –Volunteers Carol Ginn and Jane Parsons will soon add photos of the incoming trustees and senior staff to the display in the foyer.
- Bridge Builder Action Planning Team – I participated in APT and in writing the report. Overall, I feel very satisfied with the final results. The report gives us a clear roadmap for the coming months, including specific roles and timelines.
- Howson Hall Closet Cleanup – Monty Newton's cleanup went well, significantly reducing clutter. After the current Paradox Players production we will review the space allocations in the interest of reducing future clutter potential.
- BoT Retreat & Church Council Orientation – I have participated with Nell and Eric in planning these two June events.
- Mac & old phone system – Brendan Sterne has sold the Mac for a good price. He continues to work on selling the old phone system.

- Butterfly Memorial – the Butterfly Memorial has demonstrated itself to be one of the many details that Dotti just “used to take care of” but that we don’t have any formal system for ongoing operation. A small backlog of butterflies (3) has built up over the last few months, which Rose Ann Reeser has volunteered to take care of. Long-term, Natalie and I will figure out how this project should be best managed in the future.

No Update this month

- Solar Panels
- Those big speakers in Howson Hall
- Phone Lines
- Keys & Alarms
- Data Systems Integration

Respectfully submitted by Sean Hale. June 11, 2009.