

**Unitarian Universalist Church of Nashua, NH**  
**Meeting of the Board of Trustees**

May 11, 2023

*Meeting held hybrid, at church and via Zoom*

**Final Minutes** by Robin Trudel and Jodie K. Holway

**Reviewed by** Robin Trudel, Burns Fisher, Brenna Woods, Victoria Agnew, Rev. Allison Palm

**Meeting Attendees:** Victoria Agnew, Burns Fisher, Brenna Woods (President),  
Rev. Allison Palm, Anne Smith, Robin Trudel

**Excused:**

Cecile Bonvouloir (Treasurer), Lindsey Hedrick (Vice President), Jodie K. Holway (Clerk)

**Agenda:** Appendix A

1. **Chalice Lighting and Storytelling**, Victoria Agnew
  - a. Victoria expressed admiration of the teens' Faith Statements at last services
  - b. Rev. Allison: Celebrated the uniqueness of the people creating the statements
  - c. Burns: Mentored one of the youth and enjoyed this experience
  - d. Brenna: Also mentored one of the youth: "This is so cool"
  
2. **Minister's Report and Financials**, Rev. Allison (*see Appendices B and C*)
  - a. Good intern candidate interview, looks promising
  - b. Discussion of our guest minister, two weeks ago
  - c. New item: restricted operating funds report (PDF)
  - d. Financial Report Budget discussion
    - i. Currently slightly over, but part of that is the timing that the numbers were run for the report. Basically OK
  
3. **Annual Meeting**, Brenna Woods
  - a. Content seems like it'll be straightforward:
    - i. Reports, Budget, Slate of nominees, In Memoriam and closing
    - ii. Reverend Allison agrees, there will be nothing extra, just add some sort of verbal Capital Campaign report or update
    - iii. Brenna: Karen and Jess should take that part of the meeting
  - b. Balancing responsibilities among Board members for the meeting
    - i. Erika made some suggestions via email, we'll discuss tonight
    - ii. Victoria: split check-in as online vs. in-person instead of alphabetically
    - iii. Discussion of voting processes
      1. If it clearly passes in person, no need to count all the in-room votes by each quadrant
      2. Then ask for and count the online votes, including phone voters
      3. If online outcome is radically different, then we'll count the room

- iv. Discussion of personnel from the Board, how many needed?
  - 1. Someone besides Jodie dealing with discrepancies in list
    - a. Ericka agreed to take screenshots
  - 2. Lindsey could check in the people who are phone dial-in only?
    - a. Or the person checking in online attendees can also handle phone folks
  - 3. Reverend Allison: Jodie upstairs and Ericka downstairs; or separate somehow.
    - a. Burns: Jodie has to see to certify quorum.
  - 4. Do we need total two Board members in person and two online?
  - 5. One in person, one online, and two troubleshooters, agreed
- v. Other suggestions, as Brenna reviews the notes for annual meeting:
  - 1. Can Ericka start and end the poll?
  - 2. Burns: online get on early and check for updates to Zoom
  - 3. Brenna: need a tech team meeting
  - 4. Burns: Really need three microphones?
  - 5. Robin: one mic and a visual indicator?
  - 6. Anne checking people in person and Robin and Cecile helping
  - 7. Burns and Victoria online, Burns online discrepancy

#### 4. **Capital Campaign Update**, Rev. Allison

- a. TD account ready and working
- b. Merrill Lynch for Endowment mgmt account to receive gifts
  - i. Submitted paperwork for this, should be ready early next week
  - ii. Stocks received into that account, the church gets a check for deposit
  - iii. In July will be work to change signatories on all accounts
- c. Capital Campaign update:
  - i. It's on track; pledges running behind so far, but still optimistic
  - ii. This behavior is consistent with previous years at this time
  - iii. Will make capital campaign number announcement on Sunday
  - iv. Phone-a-thon and targeted email are coming, to move this forward
- d. Grant update, getting more information from NH Saves
  - i. Inflation reduction act grants, there's an update, but trying to aggregate applicants, rather than individually
  - ii. Still in progress. Significant amounts, so it's worth the effort
- e. Robin: congregant asked questions about capital campaign work about air quality/purity improvements

#### 5. **Budget Update**, Rev. Allison

- a. Waiting for official word, but budget is currently about \$2,000 over
  - i. \$375K pledge goal is reachable
  - ii. Draft budget currently has a deficit of \$9K

- iii. Invested funds may reduce that to \$7K, not much room in the budget to close that gap
    - iv. Draft budget includes "better" utility numbers due to more data
  - b. Burns: Questions regarding water usage
    - i. Estimated calculation seems we are using over a million gallons?
    - ii. Rev. Allison: Includes wastewater removal. Also, using irrigation again
  - c. Robin's question: will the Capital Campaign work have any impact on utilities?
    - i. Answer: negligible.
  - d. Reverend Allison will create a real budget, then she'll email for the Board's vote
  - e. Cemetery Association question from Rev. Allison:
    - i. Should do their own administration...
    - ii. But ultimately they are using significant church resources
    - iii. It would be cleaner if this were within the church Admin job description, and then pay for it
    - iv. **ACTION: Rev. Allison** to reach out to the Cemetery team
  - f. Reverend Allison: How mad will the BOT be if I don't take a 5% raise?
    - i. All BOT present expressed displeasure with the idea
  - g. Budget timing to finalize:
    - i. Must be published by May 28 (2 weeks before annual meeting)
    - ii. Need to have pledge total by May 19
    - iii. Rev. Allison will provide a finalized budget proposal before May 23
    - iv. We need an answer and vote before May 25. Yes, BoT says OK!
  - h. Budget and Brownies session, to review the budget before the Annual Meeting
    - i. Planned for Tuesday May 30 7pm
    - ii. Propose hybrid or entirely in person
    - iii. GA delegates might want to talk about Article 2, could discuss this at the same time
- 6. **Bonuses**, Brenna Woods
  - a. Discussion of putting any budget surplus into individual bonuses
  - b. Rev. Allison and Lindsey sent numbers: 2021-2022 surplus is \$3551.28
  - c. Have a list of the differences between desired bonus and actual bonus
  - d. Brenna discussed how to portion out the bonus to the staff
  - e. Proposal to pay taxes on bonuses and use the remainder for staff lunches
  - f. Rev. Allison didn't take her entire raise from last year's Board proposal
    - i. Therefore we suggest to give her all of this budget surplus, and she will take from it the right amount to reach the intended pay level from that proposal
    - ii. And she can distribute the remaining money in that surplus as bonuses among the other staff members as she sees fit
  - g. **MOTION** to grant Reverend Allison the remaining 2021-22 surplus of \$3551.28, and authorizing her to distribute this among herself and staff as she sees fit  
**MOVED** by Victoria Agnew, **SECOND** by Burns Fisher, **PASSES**

7. **Goals from Ministerial Review (Self-Evaluation)**, Rev. Allison (*see Appendix D*)
  - a. Brenna: these goals have been discussed, this time is for their formal review

**8. Ends Survey**

- a. This is run every year to the whole congregation, maybe every two years?
- b. The content has not changed recently
- c. Fairly new program so not a lot of expectations/history
- d. Participation has been decreasing
- e. Brenna: Run the survey because it is better to have the data.
- f. Lindsey can decide if the findings are significant they can be shared at the retreat
- g. Victoria: Will the enthusiasm of the Capital Campaign affect the results?
- h. Brenna: will send out this survey next week to the congregation

**9. Check out and closing words**

**Appendix A:** Agenda

**Appendix B:** Minister's Report

**Appendix C:** Financial Report

**Appendix D:** Minister's Self-Evaluation

# Agenda

## Board of Trustees, Unitarian-Universalist Church of Nashua

May 11, 2023 6:30-9:30pm

**6:30 (20) Check In**

**6:50 (5) Chalice Lighting: Victoria's Story**

**6:55 (10) Follow Up Story Telling**

**7:05 (5) Consent Agenda - April (Brenna)**

**7:10 (20) Minister's Report – (Allison)**

### **Annual Meeting (Brenna)**

- Jodie's plate – decrease
- Logistics

**7:30 (10) Capital Campaign Update (Allison)**

- Banks
- Numbers

**7:40 (5) BREAK**

**7:45 (20) Budget (Allison)**

**8:05 (20) Bonuses (Brenna/Lindsey)**

**8:25 (5) Goals (Allison)**

**8:30 (5) Survey**

**8:35 (5) Check Out (Brenna)**

- How did we do this evening?
- Did everyone feel heard?
- Are there any concerns or compliments you want to give to the group?

**8:40 Closing Words (Brenna)**

**Minister's Report to the Board of Trustees**  
**Rev. Allison Palm**  
**UU Church of Nashua, NH**  
**May 10, 2023**  
**Covering April 12 – May 10, 2023**

The Capital Campaign has been our biggest focus for the last month. The Team and the Visiting Stewards have been doing a fantastic job, and the campaign is going really well. We will talk more about it at the Board meeting.

Our Summer Service calendar is now finalized. It is once again a diverse and exciting set of service. My Summer Worship Workshop has started, and will conclude on May 21. We also have some great plans for worship for the remainder of the church year, including Flower Communion, Pride, Coming of Age, and an outdoor Animal Blessing.

The kids hosted an amazing Lemonade Stand and bake sale for the Capital Campaign on April 30 and raised over \$600. They did an amazing job organizing and running the sale! Our Coming of Age group has been busy preparing credos and planning their worship service for May 21. They had their last official session on Sunday and will conclude the year with a rehearsal and the service. Our 5<sup>th</sup> and 6<sup>th</sup> grade OWL calss is underway and will run through the rest of the church year. It is a great cohort of kids, and their parents have been enjoying gathering for parent groups during many of the sessions.

Our Caring Circle continued in April with two breakout rooms – one for caregivers and one for folks who are parenting young kids. In May we will once again have a caregiver group and have a room for folks who are dealing with chronic illness. Sadie held a planning session for UU Hikers and Adult Faith Formation for next year and there were lots of great ideas. We have hikes planned for May-Oct. There is interest in 2 new support groups – Peer Mental Health Support Group, with a volunteer who has training, and a Memory Café with UU Nashua as host, in partnership with the Alzheimer's Association. We are also talking about a Biblical Literacy class, book groups, Neighboring Faiths for Adults and a summer UU camping trip!

We had a huge group of UUs at the NAACP Freedom Fund dinner – so much gratitude to Jodie for her work on that and for encouraging us all to attend. The Social Justice Team is getting a lot of new members since moving meetings to after church on Sunday. The energy after their last meeting was great! The Racial Justice Working Group met and is looking ahead to a retreat in August or September to dig into the Congregational Anti-racism Rubric. The Renewal of Welcoming Team is starting to plan for Pride, including a service on June 18 and participation in the festival the next weekend. Caro is helping to organize a third 603 Equality Nashua Hub meeting for later this month. This time it will be held at the Arlington Street Community Center.

We are beginning to make plans for next year, starting with some calendaring and volunteer recruitment. I do have a potential intern candidate, who I am interviewing tonight with a small team.

### **Professional Development/Collegial Connection**

- Attended NH UUMA April Cluster meeting
- Attended NNE UUMA online annual meeting
- Continued to work on ritual book (now expected to be published in Summer/Fall 2023!)
- Attended weekly meetings with Nashua clergy

### **Community/Social Justice Activities**

- Participated in GSOP Clergy Caucus planning call, and co-facilitated monthly Clergy Caucus Call
- Attended and offered opening prayer at the Huntington Volunteer Appreciation Breakfast
- Facilitated 1 NH Council of Churches Exec meetings and one NH Council of Churches board meeting, plus one extra small group meeting
- Attended and helped lead the NH Council of Churches Annual Meeting
- Attended the NAACP Freedom Fund Dinner
- Hosted monthly NAIC meeting
- Attended 603 Equality Nashua Hub meeting

### **Children's Winter Garden with White Wing School**

- Registration is continuing for next year. There are only two spots left in all the programs for next year, and there is a waitlist for a couple classes.
- Summer camp registration was also strong this year, with 35 + kids attending each of the two weeks
- Chris is still working on hiring a teacher for the 2-year-old room for next year. She has done 3 interviews, but none of them worked out. She is going to try posting on Indeed or Zip Recruiter to see if she can get more applicants.
- There are a ton of activities this month:
  - Hop-a-thon Fundraiser
  - Family Ice Cream Social hosted by the Preschool Board
  - Outdoor Day for the 2 and 3 year old classes
  - Graduation for the 4 year old and Kindergarten classes.

### **Minister's Schedule**

- My Sunday off for May is May 28

### **Financial Report**

We are 86% of the way through the year. Both income and expenses are just slightly behind that. I anticipate us ending the year with a very close to balanced budget.

I am also sharing with you this month a spreadsheet that details our restricted operating accounts.

## MONITORING REPORTS

### **Policy F: Financial Condition and Management**

*With respect to the Church's actual, ongoing financial condition and activities, the Executive Director shall not cause or allow the development of fiscal jeopardy or a material deviation of actual expenditures and income from the annual budget approved by the Congregation or Board priorities established in the Ends Policies.*

Interpretation: This policy is interpreted to mean that:

1. The church should not be in danger of running out of money to cover expenses and financial planning goals.
2. The actual income received and money spent should be in line with the budget approved at the Annual Meeting each year in June. "Material deviation" is interpreted to mean that expenses do not exceed 105% of each budget line item approved by the congregation. The budget set each year should allocate expenses in a way that will use the financial resources of the church to further the Mission and Ends of the congregation.

Data: Our current checking account balance (minus reserve funds) is about \$101,000. This is enough for 2 months of regular operating expenses. The Income and Expense report attached indicates that no items are currently on track to exceed 105% of the budget for this year.

Statement of Compliance: I report compliance

*Accordingly, the Executive Director:*

1. *Shall not shift, adjust, or reassign any budget lines or categories to other purposes exceeding 2% of the total budget during the fiscal year without the agreement of the Board;*

Interpretation: If there is a need to shift more than 2% of the total budget between categories, the Executive Director will get the approval of the Board before making the adjustment.

Data: There have not yet been any adjustments made to the budget this fiscal year.

Statement of Compliance: I report compliance.

2. *Shall not operate without sufficient accounting controls and procedures that are maintained and documented;*

Interpretation: There should be written policies/procedures for our accounting procedures that follow standard accounting practices and ensure that there are adequate checks built into our procedures..

Data: Our current written financial policies/procedures include:

[Church Debit Card Policy](#)

[Outreach Collection Money Procedures](#)



### [Gift Acceptance Policy \(new this month\)](#)

Obviously, we continue to have inadequate written financial policies. Now that the Board has finished edits to the Governing Policies, I will work with Ericka to fill out these policies. The good news is, our practices are sound, and follow many of the guidelines [outlined by the UUA as best practices](#). Our work is simply to translate those practices into policies and procedures. I commit to making this a priority in Summer 2023.

Statement of Compliance: I report partial compliance

3. *Shall not have signature authority for checks greater than \$4,999.99 and at no time shall they sign checks to themselves, relatives closer than first cousins, or parties with a conflict of interest;*
4. *Shall not delegate signature authority to anyone other than a permanently hired Church Administrator, who is subject to the same limitations;*

Interpretation: The Executive should not sign any checks for greater than \$4,999.99. The Executive may delegate signature authority to the Church Administrator as long as they are in a permanent position and do not sign checks greater than \$4,999.99. Neither the Executive or the Church Administrator should sign checks of any amount that are written out to themselves, a member of their immediate family or someone with whom they have an identifies conflict of interest.

Data: Ericka LaValley is the only staff member besides myself who has signature authority for our checking account. She and I have not signed any checks over the \$4,999.99 limit, nor have we signed any checks to ourselves, immediate family, or anyone with whom we have a conflict of interest.

Statement of Compliance: I report compliance.

5. *Shall not undertake transactions exceeding \$10,000 without seeking multiple bids or cost comparisons;*

Interpretation: Any team or staff member of the church who is making a purchase or entering into a contract on behalf of the church that exceeds \$10,000 should obtain at least 2 bids or compare prices from at least 2 suppliers before making the purchase or entering in to the contract.

Data: Since July 1, 2023 the church has not entered into any contracts that exceeded \$10,000.

Statement of Compliance: I report compliance

6. *Shall not enter into any purchase or service contract exceeding \$25,000 without prior Board approval;*

Interpretation: Any purchase or service contract that exceeds \$25,000 must be approved by the Board of Trustees.

Data: Since July 1, 2023, the church has not entered into any contracts that exceed \$25,000.

Statement of Compliance: I report compliance

*7. Shall not acquire, encumber, or dispose of real property without prior Board approval;*

Interpretation: Any purchase or sale of land or buildings must be approved by the Board of Trustees.

Data: Since July 1, 2023 the church has not purchased or sold any land or buildings.

Statement of Compliance: I report compliance

- 8. Shall not spend or borrow Endowment funds without prior Board approval; or*  
*9. Shall not plan for annual Endowment outlays of more than the "prudent withdrawal amount" percentage, as determined by the Board, of the Endowment fund balance.*

Interpretation: The Board must approve the withdrawal of any Endowment funds. The annual budget approved by the Board and voted on by the congregation serves as blanket Board approval to withdraw any Endowment funds indicated in that budget. The proposed budget each year should not include income from the Endowment funds that exceeds the prudent withdrawal amount recommended by the Invested Funds Committee, unless approved by the Board.

Data: The Endowment withdrawal included in the FY23 budget is the amount recommended by the Invested Funds Committee. The FY23 budget was approved by the Board in May 2022 and voted on by the congregation in June 2022 We have not withdrawn any funds in excess of what was budgeted.

Statement of Compliance: I report compliance

*10. Permit expenditures from the Building Maintenance Fund without approval by the Board of Trustees in accordance with the need for expediency as listed below. Recognizing that various degrees of urgency may accompany a request to use reserve maintenance funds, the following criteria shall be used to determine the sequence to be implemented.*

- 1. Routine request will be acted upon during the Board's next regularly scheduled meeting.*
- 2. Upon receiving an Urgent request, one that requires a timely response, the Board shall make every attempt to act on that response within 24-48 hours.*
- 3. A Catastrophic request, one that requires an immediate, concerted response to prevent additional grave problems from developing, will require approval by at least two of the following three: the President, the Executive Director, or the Treasurer. A report of this request and any*

*expenditures approved in this manner shall be sent to the Board within 24 hours of its receipt.*

Interpretation: Any expenditures from the Building Maintenance Fund should be approved by the Board and follow these procedures outlined in this policy.

Data: The only expenditure from the Building Maintenance Fund for this fiscal year was \$11,000 for the preschool doors, approved by the Board in Sept. 2022.

Statement of Compliance: I report compliance

# Unitarian Universalist Church of Nashua

## Budget vs. Actuals: FY 2023 - FY23 P&L

July 2022 - June 2023

|                              | TOTAL               |                     |                      |                   |
|------------------------------|---------------------|---------------------|----------------------|-------------------|
|                              | ACTUAL              | BUDGET              | OVER BUDGET          | % OF BUDGET       |
| <b>Revenue</b>               |                     |                     |                      |                   |
| 100 Questions                | 247.66              |                     | 247.66               |                   |
| Endowment                    | 140,685.36          | 170,500.00          | -29,814.64           | 82.51 %           |
| Fundraisers                  | 7,322.53            | 7,325.00            | -2.47                | 99.97 %           |
| Other Income                 | 384.80              |                     | 384.80               |                   |
| Outreach Collections         | 29,999.64           | 35,000.00           | -5,000.36            | 85.71 %           |
| Pledges                      | 302,204.69          | 358,000.00          | -55,795.31           | 84.41 %           |
| Preschool Contribution       | 24,000.00           | 30,000.00           | -6,000.00            | 80.00 %           |
| User Fees                    | 2,591.66            | 6,000.00            | -3,408.34            | 43.19 %           |
| <b>Total Revenue</b>         | <b>\$507,436.34</b> | <b>\$606,825.00</b> | <b>\$ -99,388.66</b> | <b>83.62 %</b>    |
| <b>GROSS PROFIT</b>          | <b>\$507,436.34</b> | <b>\$606,825.00</b> | <b>\$ -99,388.66</b> | <b>83.62 %</b>    |
| <b>Expenditures</b>          |                     |                     |                      |                   |
| <b>EXPENSES</b>              |                     |                     |                      |                   |
| <b>OPERATIONS</b>            |                     |                     |                      |                   |
| ADMINISTRATION               | 24,972.37           | 33,100.00           | -8,127.63            | 75.45 %           |
| COMMUNICATIONS               | 937.77              | 1,300.00            | -362.23              | 72.14 %           |
| DENOMINATION                 | 24,909.00           | 24,909.00           | 0.00                 | 100.00 %          |
| PROPERTY                     | 83,599.88           | 101,200.00          | -17,600.12           | 82.61 %           |
| STEWARDSHIP                  | 1,461.95            | 1,500.00            | -38.05               | 97.46 %           |
| <b>Total OPERATIONS</b>      | <b>135,880.97</b>   | <b>162,009.00</b>   | <b>-26,128.03</b>    | <b>83.87 %</b>    |
| <b>PROGRAMS</b>              |                     |                     |                      |                   |
| BOARD EXPENSES               | 338.81              | 800.00              | -461.19              | 42.35 %           |
| FAITH FORMATION              | 3,538.25            | 4,700.00            | -1,161.75            | 75.28 %           |
| LEADERSHIP DEVELOPMENT       | 467.33              | 200.00              | 267.33               | 233.67 %          |
| MEMBERSHIP                   | 1,444.99            | 2,450.00            | -1,005.01            | 58.98 %           |
| MUSIC & WORSHIP              | 4,809.92            | 7,760.00            | -2,950.08            | 61.98 %           |
| SOCIAL JUSTICE               | 30,864.08           | 39,440.00           | -8,575.92            | 78.26 %           |
| <b>Total PROGRAMS</b>        | <b>41,463.38</b>    | <b>55,350.00</b>    | <b>-13,886.62</b>    | <b>74.91 %</b>    |
| <b>STAFF</b>                 |                     |                     |                      |                   |
| ADMINISTRATIVE STAFF         | 98,605.87           | 111,277.74          | -12,671.87           | 88.61 %           |
| MINISTER                     | 126,268.61          | 150,440.02          | -24,171.41           | 83.93 %           |
| PROGRAM STAFF                | 107,740.21          | 128,031.02          | -20,290.81           | 84.15 %           |
| <b>Total STAFF</b>           | <b>332,614.69</b>   | <b>389,748.78</b>   | <b>-57,134.09</b>    | <b>85.34 %</b>    |
| <b>Total EXPENSES</b>        | <b>509,959.04</b>   | <b>607,107.78</b>   | <b>-97,148.74</b>    | <b>84.00 %</b>    |
| <b>Total Expenditures</b>    | <b>\$509,959.04</b> | <b>\$607,107.78</b> | <b>\$ -97,148.74</b> | <b>84.00 %</b>    |
| <b>NET OPERATING REVENUE</b> | <b>\$ -2,522.70</b> | <b>\$ -282.78</b>   | <b>\$ -2,239.92</b>  | <b>892.11 %</b>   |
| Other Revenue                | \$ -1,192.20        | \$0.00              | \$ -1,192.20         | 0.00%             |
| Other Expenditures           | \$0.00              | \$0.00              | \$0.00               | 0.00%             |
| <b>NET OTHER REVENUE</b>     | <b>\$ -1,192.20</b> | <b>\$0.00</b>       | <b>\$ -1,192.20</b>  | <b>0.00%</b>      |
| <b>NET REVENUE</b>           | <b>\$ -3,714.90</b> | <b>\$ -282.78</b>   | <b>\$ -3,432.12</b>  | <b>1,313.71 %</b> |

**Restricted Operating Funds  
As of May 10, 2023**

| <b>Fund</b>                                      | <b>Total</b> |
|--|--------------|
| <b>TD Bank Money Market (Capital Campaign)</b>   | \$ 58,432.10 |
|  |              |
| <b>Capital Campaign for Money Market Account</b> | \$ 8,223.60  |
| <b>Audit Fund</b>                                | \$ 3,600.00  |
| <b>Bicentennial Fund</b>                         | \$ 3,891.93  |
| <b>Building Maintenance Fund</b>                 | \$ 47,655.00 |
| <b>Community Dinner Fund</b>                     | \$ 3,422.11  |
| <b>Ministers Discretionary Reserve</b>           | \$ 3,446.35  |
| <b>Sabbatical Fund</b>                           | \$ 2,491.25  |
| <b>Senior High Youth Group Fundraising</b>       | \$ 477.85    |

**Self-Evaluation**  
**Rev. Allison Palm**  
**March 2023**

**1) What has felt like a highlight/success of ministry this year?**

We had two successful sabbaticals – Sadie’s sabbatical from mid-January through mid-May and mine from July-November. I think these were a success in a couple of ways – one is that I know we both came back feeling renewed and ready to serve the congregation with more energy and depth. I know that I was running on empty when I left for sabbatical, after 7 pretty full years with the congregation, including 2 ½ in a pandemic and doing it all with two little kids. The sabbatical definitely changed me in ways I am still figuring out, but the biggest thing is that I feel excited about ministry, rather than exhausted by it.

The other way that the sabbaticals were successful is the way that the congregation not only survived but actually thrived through those months. We both came back to find a congregation that had done really good work in our absence. When I got back, I had people practically lining up at the door to become members. That was a clear indicator for me that the congregation was doing well. You also had a major vote while I was away with a very minimal amount of drama, and a lot of healthy conversation and disagreement. This is, of course, all thanks to our phenomenal staff and lay leaders (that includes you, BoT!). Everyone really stepped up, and I am so grateful for that.

Another highlight for me this year has been working with that phenomenal staff team. I didn’t have to do any hiring this year, which was lovely, and I think we have the strongest staff team we have had since I started at the congregation. This doesn’t not mean there aren’t sometimes challenges, but mostly it has been a joy working with such thoughtful, capable people, and it certainly makes my job as a supervisor easier.

The last thing I will highlight is that I feel really good about the Building Our Vision process and how our work with the architects unfolded this year. I feel like we were able to do a really thorough and thoughtful job with the plans for our building; we included a bunch of people in those conversations, and the final plans feel true to our mission and values. I am really proud of the BOV Team, the Board, all our task forces and the whole congregation for the really really good work we’ve done together.

**2) What areas felt like a challenge?**

The continued challenge in 2022 was the shift back to doing more in-person, while navigating the ongoing pandemic. This took a ton of time and energy, and there was never a point in 2022 where we were not dealing with people who strongly disagreed with our choices, It was also a challenge to figure out who is and is not a part of our congregation as we made that transition. There are still some people who I am not clear if they are gone forever.

In the midst of that, volunteers have been a challenge, especially for Sunday mornings. We have not gotten back to a point where we regularly have greeters and fellowship hosts, and it has been

a struggle to recruit enough tech help at times. I feel like we need to do something differently to make Sunday morning volunteers work, without being too burdensome to the staff.

I also personally found it challenging to continue to do so many meetings on Zoom. I appreciate the convenience of it, and I feel strongly about keeping the option for those who need it, but I really crave and savor the times when we can be fully in person. I often don't find joy in ministry on Zoom, and it does not feed me in the way that in-person connection does.

### **3) What help do I need?**

This winter, the Board has already been immensely helpful in moving us towards the Capital Campaign. I have been so impressed with the way you all have really showed up as leaders in this time. Keep it up!!

I think Ericka and I could really use some help figuring out how to solve the Sunday volunteer issue. We are both a bit fed up at this point, and not sure what else we can do to make it work.

### **4) Where/when have I been able to take risks?**

Every time we make a change in our Covid policy feels like a risk in a whole bunch of ways. In some ways, we've done it so many times that it feels like old hat by now, but in other ways each time feels like a new level of anxiety.

The BOV process has also felt like it includes a lot of small moments of risk.

It is interesting to be writing this so late, because I want to talk about all the risk taking in the last three months, but I'll save that for next year!

### **5) What are my goals for next year and how will know I'm successful?**

1. To lead boldly through the capital campaign & building project, while encouraging as many people as possible to engage with the project. I want to offer encouragement to our leaders and the congregation to take risks and believe in what we can accomplish together. I want us to feel like the project is really a whole congregation effort.
2. To work towards publications of "Blessing it All" (expected Summer/Fall 2023), and plan for at least one event or workshop that promotes the ideas from the book.

### **6) Progress on Last Year's Goals** (goals in italics, commentary in plain text)

*To take a five-month sabbatical, ensuring that the staff and congregation have the support needed while I am away, and that I am able to find the rest and renewal I need.*

Success! See notes above.

*To re-connect with the congregation and staff thoughtfully and deliberately when I return from sabbatical.*

I feel like I have been able to accomplish this. It definitely took a couple months. Some particular things that helped:

Inviting people to fill out notecards/online form with what they want me to know. Some people shared more deeply there than they ever have with me.

Lots of pastoral phone calls!

A staff retreat in January

Taking things slow in December, focusing mostly on Christmas and catching up on what had been happening.

*To revive our staff gratitude practice of writing thank you notes to volunteers each week.*

We have been doing this nearly every week, and we often hear back from people about how meaningful those notes are. It also makes us end our meeting each week with gratitude, which is great, especially when we have to discuss harder things.

*To continue to work towards publication of an edited volume of UU rituals*

I did a ton of work on this during my sabbatical, and I think this is finally going to be published in 2023. We are on the last editorial stages!