



First  
Unitarian Universalist  
Church of San Diego

Rev. Kathleen Owens, Lead Minister  
Rev. Ian W. Riddell, Minister of Music and Worship Arts  
Rev. Tania Márquez, Assistant Minister  
Rev. Jim Grant and Rev. Löne Broussard, Affiliate Ministers  
Robie Evans, Director of Operations

May 16, 2019

Dear Members and Pledging Friends,

As a large congregation, there is a lot happening in many areas of ministry. The end of the current church year is quickly approaching and I want to make sure you are up-to-date with important information about our community as we continue to deepen our work in radical inclusivity and Journey Towards Wholeness (JTW) throughout our congregation. I want to share information about:

- the budget for our upcoming fiscal year (July 1, 2019 - June 30, 2020) that will be voted on at our annual meeting on Sunday, June 9<sup>th</sup> at 1:00 p.m. in the Meeting House at our Hillcrest campus,
- the various hiring teams we have and the progress/timeline for the positions we have open,
- the timeline for the re-visioning/strategic plan, and
- information regarding the UCSD hospital expansion.

### **Our upcoming budget**

Thank you, thank you so very much for the many of you who have increased your financial commitments and giving to this congregation. Income from pledges is the highest and most important income line in our budget and your increases have made an important and meaningful difference. Again, thank you.

I shared with the Finance Committee that this year, the theme for our upcoming budget is “Living Our Values Within Our Means.” Other income lines in our budget unfortunately haven’t been going up like our pledge line. These other lines include our parking lot income, fundraisers, and rental income we receive from a generous donor. These lines have gone down – especially our parking lot income. In the recent past, we could expect \$500,000 in income, and this coming year, based on actual money received, we’re forecasting \$424,000. And some of our expenses are up – including medical insurance, retirement contributions (because more of our employees now qualify for retirement) and we have a higher rate of expense when hiring new employees, according to UUA fair compensation guidelines.

All of this means that we’ve had to make some cuts in expenses while keeping in front of us the question – what kind of employer do we want to be? With this question in mind, we’ve made the following cuts in order to have a balanced budget:

- Retirement contribution – cut from 11% to 10% (the minimum allowed in the UUA plan)
- Ministry teams – cut \$12,200 (involving all ministry teams)
- Professional expenses – cut \$15,950
- Transfer to Cluster - \$1,000 (used to be \$2,000)
- Transfer to Unemployment - \$2,400 (used to be \$4,800)

Because we’ve gone from three ministers to two, Tania and I are taking on more responsibilities, which in turn means that a few program staff have increased hours to cover more responsibilities (Social Justice Coordinator



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and the Dir. of Family and Lifespan Ministry) and some programs were folded into existing programs (OWL – Our Whole Lives folded into the Religious Education program). Angela Fujii's hours in social justice went from 30 to 40 hours with the support of a loan from the Social Justice Endowment. The Dir. of Family and Lifespan Ministry went from 30 to 40 hours through two anonymous gifts.

The budget you'll see at our annual meeting is a one-year plan...it's very lean. We need to find ways to increase our other funding lines to ensure all our programs are meeting the needs of our congregation; and we have a real dilemma – the staff hasn't had a raise in at least four years, and this means we're now out of compliance with the 2019-2020 UUA's compensation guidelines for our region. Replacing staff will always cost the church more, and in the long run, we won't be able to attract and retain staff because our salaries are too low. We are not overstaffed; what's really hurting us are two problems: our mortgage payment of \$120,000/year (which we've paid for the last seven years) has made for a tight budget and no raises for staff or increases in Ministry Team monies; the other problem is the large decrease in our parking lot income of \$100,000 that we experienced this year. Before we knew Rev. Ian was leaving, we were trying to balance the budget by reducing staff hours, across the board. His leaving has meant we were able to maintain current staff hours, but there isn't any extra available because he's leaving...remember, along with our mortgage, we also lost \$100,000 in the parking lot income.

When the hospital begins its remodeling and building projects (planned for the summer of 2020), we can expect our parking lot income to increase because we hope hospital contractors will pay to park in our parking lot. I have said to both the Finance Committee and the Board that any surplus in the parking lot income line above \$400,000 must be spent on staff raises and lowering our mortgage. And the executive staff and Finance Committee will be looking at ways to restructure our expenses to reflect our values and our commitment to our JTW work.

### **Hiring Teams**

With appreciation to our JTW core team members, we are in the process of creating a system that centers our need for a more inclusive staff. This process includes many components such as ensuring diverse hiring teams, creation of job descriptions that center our inclusivity work and needs and intentionally creating a diverse hiring pool through where we post job descriptions and other ways of inviting applications.

I'm happy to report that the hiring team for the Dir. of Family and Lifespan Ministry is in the final stages of its work. It has been a joy to work with the hiring team: Mardi Bishop, Thom Harpole, Alison Aguilar Lopez Gutierrez McLeod, and Rhiannon Rudisill. There will be more details about the process of our work after we're finished.

The hiring committee for our music staff is just beginning. Many thanks to the members of this team, including Sean Bohac, Chris Ferguson, Kiona Daelyn, Rile Grant, Sue Marberry, and Alex Mack. We also plan to host some focus groups made up of more people who want to contribute to this process. We are looking for a half-time Music Coordinator who will also direct both the Chalice and Youth Choirs. We are also looking for a half-time keyboard player (both piano and organ). It is the intention of the committee to have these positions filled by September 1<sup>st</sup>. These positions will be temporary (2 years) with the possibility of a permanent hire once we



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have finished our re-visioning/strategic planning process. We do not foresee hiring another Minister of Music and Worship Arts in the near future.

### **Re-visioning/Strategic Plan**

The Board and a team of lay leaders including Board members, members of the Journey Towards Wholeness team, and the congregation, known as the Re-visioning/Strategic Plan Sub-committee, are already engaged in the process of this work. This re-visioning/strategic planning work will happen in two phases.

Phase I will happen through this team under the leadership of the Board. We will provide ample opportunities for you to participate in articulating the vision you see for our congregation. There will be conversations and places for all of us to post our answers to the big questions, including who are we now, who are we called to serve and how, and where are we called to serve. We need you to participate in conversations and after hearing from as many of you as possible in the time frame we have, a report will be generated from the team, analyzing the data from the congregation.

Phase II will include hiring two facilitators who are both strategic planners and UU ministers. The Revs. Marta Valentin, who worked with the Board and congregation in December 2018, and Roger Bertschhausen, who worked with the Board for three years, will be with us in August and lead the Board and the Re-visioning Team through a process, utilizing the data collected from Phase I, to create a new vision/strategic plan for the congregation. Funds to pay for the facilitators have come from individuals and from matching funds made accessible by the contributions and commitments of the newest members of the Sustainers of the Flame. Thank you to the donors who have made our work with the facilitators possible.

### **UCSD Expansion and First UU Church**

In the fall, upon completion of the new re-vision/strategic plan that centers our JTW work and our vision for our shared ministry, we will begin the conversation regarding the options (and potential consequences) we have in responding to UCSD's expansion and their offer to buy our Hillcrest property. We will have up to two and a half months to decide what we will do. UCSD is asking for a final decision by December 2019. This will be a decision made by the congregation, based on our values and the new vision/strategic plan we've created.

This is a lot of information to take in. And it's a lot for a congregation to do in any given timeframe. I know we are up to these tasks: of creating a budget based on our values that lets us be the best employer we can be, of finding leaders to fill our open staff positions to continue excellence in worship, music and programs, and of creating a dynamic and inspiring vision of shared ministry, wherever we are. These tasks will take our time, our patience and a great deal of listening and compassion. We have the ability to create a new vision for our future if we all participate in this work together.

Thank you for being an important part of this shared ministry.

Faithfully yours,  
Kathleen



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