

Core Group Preliminary Report to Standing Committee

Executive Summary

Given a sizable and projected ongoing budget deficit, Standing Committee charged the Core Group with undertaking an analysis to recommend changes to staffing. The group found that, compared with other churches, WUS expenses for Religious Education staff were high. Since members of the Core Group do not have children in the RE program, we recommend that Standing Committee appoint a task force which includes parents to make proposals for a program that could be operated for a lower cost.

Report

Why was the group appointed?

At the annual meeting in May 2018 Standing Committee presented a draft budget for the fiscal year 2018-2019 with a deficit of nearly \$30,000 along with a commitment to undertake a staffing analysis since personnel costs are 70% - 75% of expenses. After investigating the possibility of engaging an outside consultant, Standing Committee decided to work with the Rev. David Pyle, Congregational Consultant for the UUA, who had developed a process for congregations to perform their own staffing assessments with his coaching.

What was its process?

Standing Committee appointed Patty Cameron, Sue Kiewra, Don Landing, Judy Murray and Kathy Richardson – the Core Group – to perform the assessment, which has involved several steps:

- An all-day workshop led by Rev. Pyle, which was also attended by several other members of Standing Committee, the Rev. Heather Janules, Congregational Administrator Alison Baron and the Rev. Woullard Lett, Acting Lead of the New England Region of the UUA;
- Gathering internal background information, including personnel policies, financial information, job descriptions and letters of agreement;
- Interviewing the Rev. Heather Janules and six staff members (Rebecca Kelley-Morgan, Sam Wilson, Haley Wegner, John Kramer, Alison Baron and Jenny Goh) with an emphasis on what is working well and where challenges lie, especially as they relate to serving the congregation's mission;
- Contacting other UU churches for information about staffing and finances; these congregations were recommended by Rev. Pyle: First Parish in Arlington MA, the UU Area Church at First Parish Sherborn MA and the UU Congregation of Columbia MD.
- Gathering from the internet or other publicly-available documents data from nearby UU congregations as well as First Congregational Church in Winchester.

See the three tables at the end of this report for a summary of numeric data.

What did it find?

Although non-standard reporting makes direct comparison with other churches difficult, some broad conclusions can be drawn. Based on our review of eight other churches (six Boston-metro-area UU

churches, the UU church in Columbia MD and First Congregational in Winchester) and an examination of internal records, we can make these observations relevant to staffing:

1. In many cases staffing differences can be attributed to different priorities, resources and history.
2. A common staffing pattern has one person with primary responsibility for religious education for children, youth and adults. In most cases, it is impossible, using commonly-available financial reports, to separate out the costs for youth programming from those for other ages.
3. The combined cost for RE and youth programming at WUS significantly exceeds that of all other churches as a percent of staff expenses (31.7% compared with 23.4% for the next-highest church) although our enrollment is significantly smaller (53 infant through high school compared with 87 for the next-lowest church as reported to the UUA in January 2019).
4. WUS's FY20 budget includes \$98,040 for RE staff and \$59,973 for youth staff. The RE number includes oversight of adult education offerings.
5. We do not have current enrollment numbers for the children's program. There are 36 enrolled in WUSYG this year.
6. WUS's enrollment in RE and youth programs has generally declined in recent years, but reporting seems inconsistent and, for most years, poorly documented. Some of this fluctuation may be attributed to staff turn-over in the office.

What does it recommend?

The Core Group recommends a focus on RE as the area for changes. We recommend that the Standing Committee charge a task force comprised of parents and others with interest in RE programming to propose specific ways to provide a meaningful program with fewer financial resources. We recommend that the task force be given a deadline of November, 2020, with changes to be reflected in the FY22 budget and programs.

Patty Cameron, Sue Kiewra, Don Landing, Judy Murray, Kathy Richardson
February 17, 2020

Staffing and financial comparison

**WUS, seven UU churches, First Congregational Winchester
2018 - 2019**

Note: WUS number is highlighted if it is the highest or lowest of the churches on that line.

Table 1. Staffing: Numbers of staff members are based on web pages which may not list all staff.

Staff (full-time equivalents unknown)	FP Lex 224	WUS 268	Reading 286	Sherborn 298	Follen 340	Bedford 393	First Cong. 408	Columbia 428	Arlington 429
Members RE enrollment (Nursery thru Grade 12) from UUA.com	87	53	87	161	123	102		133	261
Minister	1	1	1	1	1	2	2	2	1
Student minister		1	1	1					
Affiliate minister				1		1			
Assistant to minister									1
Administrator	1	1	1	1	1	1	1	1	1
Other office + bookkeeper		1	1	1		1	1	2	1
Communic./membership/volunteer coord.			1	1	2				1
Sextons	1	3	2		1	1	1		1
Education director	1	1	1	Minister	1	1	1	1	1
Other education + nursery		7	2					1	1
Youth	1	2						1	1
Music director	1	1	1	1	1	1	1	1	1
Accompanist			1			1	1		1
Other choir director		1				1		Assoc. dir.	
Soloists + others		4							
Counseling & spiritual direction							1		
Health & wellness							1		

Table 2. Distribution of cash compensation

- Arlington has just one budget line for all salaries, payroll taxes and benefits.
- Follen and First Congregational lump all payroll taxes and benefits into one budget line.
- Bedford has parsonage – hard to calculate how this figures into these comparisons.

Staff Expense (% of salary only)	FP Lex	WUS	Reading	Sherborn	Follen	Bedford	First Cong.	Columbia	Arlington
Total salary + benefits	\$293,297	\$505,170	\$348,114	\$425,696	\$531,118	\$517,068	\$564,307	\$626,632	\$552,567
Salary only		\$408,608	\$265,691	\$329,350	\$412,638	\$407,477	\$432,920	\$519,817	
Ministers		28.1	34.2	35.6	24.9	42.3	39.8	28.1	
Administration		17.8	15.8	12.4	18.2	23.5	14.7	23.7	
Commun./memb./vol. coord.			6.9	6.6	7.1				
Building		8.8	8.8	11.9	5.4	3.3	9.7	15.6	
Religious Education		20.0	21.1	20.0	16.6	16.3	11.1	15.3	
Youth		11.7		3.4	2.6			4.1	
Music		13.7	13.1	10.6	25.1	14.6	16.3	13.2	
Health & Wellness							8.4		

Table 3. Expenses from the latest available budget or proposed budget

Expenses (% unless noted)	FP Lex	WUS	Reading	Sherborn	Follen	Bedford	First Cong.	Columbia	Arlington
Total expenses	\$425,580	\$691,734	\$512,637	\$549,717	\$670,775	\$696,962	\$802,292	\$729,131	\$808,213
Expense/member	\$1900	\$2581	\$1792	\$1845	\$1973	\$1773	\$1966	\$1704	\$1884
Staff salaries and benefits	71.1	73.0	67.9	77.4	79.2	74.2	70.3	85.9	68.4
Building, including utilities	16.1	11.0	21.7	5.4	4.0	10.4	8.5	7.0	11.9
Administration, incl. insurance	6.6	4.7	5.9	6.7	4.3	4.0	6.9	2.4	5.4
Denominational support		3.7	2.9	4.0	3.9	5.7	6.2	2.1	4.6
Outreach grants		5.0	0.1		2.5	2.2	5.1	1.2	2.7
Program support, other & unk.	6.2	2.8	1.5	6.5	6.1	3.5	3.0	1.3	7.0

NOTE: Expense reporting is not standardized, and churches may group expenses differently. For example, guest speakers or one-time musicians, which are considered staff expenses at WUS may be included in a committee budget in another church. Where enough detail was reported, costs were grouped as they would be for WUS.