

East Shore Unitarian Church Meeting of the Board of Trustees August 2023 Board Packet

Our East Shore Unitarian Church Board Covenant

We covenant to hold the Eight Principles of Unitarian Universalism, the Mission of ESUC, and the ESUC Right Relations Covenant as the touchstones for all actions and decisions we make as a Board. We recognize that how we hold and treat each other, and the congregation is the spiritual ground from which grow the actions and decisions that support the health and welfare of the church now and in the future. We aspire to lead by example, filled with good will for all present and the full congregation, and calling forth the best in all congregants and empowering their strengths and contributions. We support the entire congregation by contributing our best selves and our best gifts in trust for future generations.

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Agenda

August 24th, 2023, 3:30pm - 5:30pm PT

Facilitator: Signe Lalish, President
Timekeeper: Geri Kennedy
Process Observer: Evelyn Smith
Tech Helper: Rebecca Chatfield

<u>Item</u>	<u>Time</u>	<u>Facilitator</u>
Chalice Lighting and Reading	(2 mins)	David Langrock
Check-in	(5 mins)	All Attendees
Consent Agenda	(2 mins)	Signe Lalish
<ol style="list-style-type: none">1. Approve the July 2023 BOT meeting minutes.2. Approve Budget Committee Charter.3. Approve Geri Kennedy, Board Treasurer, as Chair of Budget Committee.		
Discussion Item #1: Review UUA Comp Guidelines	(15 mins)	Rebecca Chatfield
<ul style="list-style-type: none">• Review new framework (2022) for UUA compensation guidelines.<ul style="list-style-type: none">◦ See Appendix B: UUA Compensation Guidelines◦ Also see Jan Gartner, UUA, training (Ask Nicole for link)• Discuss potential of Board policy re: annual employee compensation COLA		
Discussion Item #2	(10 mins)	Geri Kennedy
<ul style="list-style-type: none">• Discuss budget allocation guidance from Board to Budget Committee based on understandings from the retreat.		

Commented [MC1]: The board did not discuss the budget at the retreat. This discussion will most likely address whether to change the way ministry teams gather and make donations to organizations outside esuc directly rather than wider congregational agreement.

Discussion Item #3: How Board will continue Anti Racism / Anti Oppression / Widening the circle work	(10 mins)	8 th Principle Team (Nicole)
<ul style="list-style-type: none"> Please read the 8th Principle Team Proposal in the 8th Principle Team Liaison Report section of this Board Packet. 		
Discussion Item #4: Proposed procedure re: Appointing Board Committee Members	(5 mins)	David Langrock
<ul style="list-style-type: none"> Please read the proposed new board procedure in the Vice President’s report. 		
Discussion Item #5: Appoint Rhythm of the Year Sub-Group	(5 mins)	Martin Cox
<ul style="list-style-type: none"> Subgroup to prepare proposal for September BOT outline. Gathering details from SLT members and “level up” for BOT decision making outcome timelines BOT needs to know e.g. when to establish board goals, etc. 		
Announcements	(5 mins)	Facilitator TBD
Process Reflection	(5 mins)	Evelyn Smith
Closing	(2 mins)	David Langrock
Dismissal		Signe Lalish
Executive Session	(45 mins)	Executive Committee
<ul style="list-style-type: none"> Holly House (place holder) UUA Guidelines and Wage equity study (10-15) (Rebecca only: other SLT excused) <ul style="list-style-type: none"> Rebecca can compare UUA Rubric to current staff comp Recommended adjustments including COLA Other Personnel Items (5-15) (All SLT excused) Board Budget (Geri) (5-10) (All SLT excused) 		

August Consent Agenda Voting Items

- 1) Accept the Board of Trustees Minutes from the July 2023, meeting as written (Appendix A)
- 2) Approve Budget Committee Charter.
- 3) Approve Geri Kennedy, Board Treasurer, as Chair of the Budget Committee.

August Board Reports

Minister's Report – Rev. Dr. María Cristina Vlassidis Burgoa

No Report Submitted

President's Report – Signe Lalish

No Report Submitted

Vice President's Report – David Langrock

This section contains Discussion Item #4: Proposed procedure re: Appointing Board Committee Members

For this item, someone may motion to adopt the following procedure:

New Board Procedure:

All board votes which alter the composition and/or leadership of board committees and task forces shall be held during an Executive Session of the board in which only the Board of Trustees and the Staff Leadership Team are present.

The reason for this procedure is to ensure a robust discussion can be had among the Board and SLT about any proposed changes to the composition of a board committee or task force. This procedure does not preclude having a discussion during a regular session about the composition of a committee or task force. Nor does it preclude the board from formally writing up and sharing the reasoning of their decision with the committee or task force in question.

Treasurer Report – Geri Kennedy

Treasurer's Report – August 2023

The budget process has begun. Our first meeting was mostly procedural, discussing charter and approaches to the new reserve funds. The next meeting is Monday the 21st where the charter will hopefully be approved. I will have to send the final copy to the board that evening or early on Tuesday for the consent agenda.

We will begin looking at projections for the budget at this meeting as well. I have asked Rebecca to start us off with a "dream" budget, including many wishes and also staffing costs. Rebecca will be sending out the budget requests to various teams and committees with the caveat that funds for outside groups will not be approved for the budget, but they can apply for a Share the Plate option. This will make our outside East Shore donations more visible and include more of the congregation, rather than a very small group of folks.

Along those lines however, I have asked that the possibility of having a “Real Rent” donation included as a budget line item. It has long concerned me that our Sunday Service and many meetings begin with our land acknowledgement, but, other than through the indigenous people’s team, again, a small number of folks, we don’t do much. If it is a line item on the budget it becomes a congregation wide effort. We may want to put this on a near future board agenda for discussion.

I have also asked that there be a specific income line item for bequests to highlight the importance of this income. While it comes along with the sadness of the passing of one of our own, this year’s bequest has been a huge help for the overall budget, especially with the loss of the parking lot income. I plan to work with Nicole to raise awareness of the possibility for folks to include ESUC in their estate planning.

With Claudia’s resignation, the voting members of the Financial Stewardship Committee are down to 4. There was no quorum for this month’s meeting. As board liaison, I have sent an e-mail to the group to encourage more participation of all members, but we may need to start looking for some folks who can be a bit more involved, in addition to a new chair. The recent work done by Claudia and the Committee on 5 year/long term overall planning is important. Also, the Committee should begin well in advance of the finalization of the sale of Holly House to have a plan to present to the board and congregation around use of the proceeds not already specifically allocated.

As of the end of July, we were still about \$100k income over expenses. We’d be even except for the bequest. Staff is working hard to increase rental income and decrease expenses but there is only so much that can be done without additional congregational support.

Director Of Finance and Operations Report – Rebecca Chatfield

DFO’s Report - Rebecca Chatfield

24 August 2023

Multiple topics introduced for the July Board packet are repeated here with updates for August.

Income from increased rentals – confirmed!

As previously reported to the Board, I negotiated a deal to bring in new income from day-use rentals of a few upstairs Education building classrooms and the E101 office weekdays September through next June. This rental is to provide overflow space for a local homeschool enrichment program for high school age youth that follows Waldorf curriculum (www.eastsidecommunityschool.org) with mission and values that align well with East Shore. I’m so pleased to report this will bring in approximately \$73,000 of new income between August and next June. Our other uses of the Education Building (church use & rentals) will be able to carry on largely as expected, although we will be moving most Congregations for the Homeless activities over to the North Room and Sanctuary this October.

2024 Budget Work: Schedule

Our Budget Committee has started meeting and working on initial draft budgets using actuals and projected year-to-date figures. Budget drafts created in September and October will be discussed at

Town Halls with members in October. Budget approval from Board is mid-November proceeding to formal member vote on the proposed budget at the Congregational meeting on December 10th.

2024 Budget Work: UUA compensation guidelines

Staff Leadership Team is discussing how to live our values through wage equity awareness. This means making sure our lowest-paid employees on staff are receiving at least the minimums recommended by the new 2023 UUA guidelines on revised job categories. Budget Committee similarly will be incorporating best practices and guidelines for staff compensation into the proposed draft budget.

2024 Budget Work: COLA

The plan is to incorporate 3% Cost of Living Adjustment (COLA) for staff wages in the 2024 budget. The COLA rate mirrors the proposed rate increases to Social Security recipients and is linked to publication of the Labor Bureau's Consumer Price Index for Urban Wage Earners. The Board is requested to more formally ensure that COLA considerations are a fixture in our future budgeting.

2024 Budget Work: Consolidated Fundraising for Outside Organizations

The Budget Committee will soon be contacting leaders in church groups. One proposal is better coordination of fundraising efforts for outside organizations by making them church-wide efforts. This reduces/eliminates the fundraising currently done by multiple individual ministry teams. At times a worthy outside organization will be identified and East Shore as a whole collects donations and sends a check. The goal is deeper and richer connections with a curated list of organizations that support our mission and values. The bigger-picture issue for Board consideration is how we are choosing to allocate church resources in money AND time to best enact our mission. Some ministry team fundraising becomes an intensive use of staff time and facilities. Also and importantly this type of ministry team fundraising is a strain on the overall "donation bandwidth" of church members. There may be some pushback from some ministry teams whose programs need adjustments going forward.

Financial Statements – July 2023

See provided financial statements included below. Detailed reports are readily available. July 2023 financial statements are at the end of this report. Balances in all accounts are documented with appropriate reconciliations. The highlights:

- Expenses (\$86,530) exceeded Revenues (\$72,513) by \$14,000. This pattern is common in July.
- Endowment Equities account balance is \$1,074,755. Market went up nicely again this month.
- Endowment Fixed balance is \$104,356. Went up slightly.
- The amount owed on the mortgage on the Education Building is \$352,634. This loan will be paid off in November 2026 so we are looking at 3 more years of loan payments.
- Rental income up substantially due lucrative summer rental activities.

- We paid \$1750 for the second part of our Church Mutual multi-peril insurance. Overall our policy costs were reduced in 2023 due to not making any insurance claims for several years.
- Utility costs for internet, garbage, water/sewer are tracking as expected. Energy costs increased.

Miscellaneous Finance, Bookkeeping and Banking Items

- Coordinating payment details with Julica Hermann de la Fuente, facilitator for Board Retreat.
- Sent BECU cc statements to SLT members.
- Urgent attention to a quick fraud mitigation for Amanda Alice's stolen ESUC credit card including cancelling card, tracking down charges, and initializing the new card.
- Updated pledge and ACH collection data at Chase for a few members.
- Paid attorney fees vetted by Holly House Task Force. There is approximately \$6000 left in the \$25K allotted by previous Board to Holly House Task Force for investigating issues on parcel.
- Helped Budget Comm finalize wording on proposed Charter.
- Finance Team reviewed spreadsheets mapping out future contributions to Building Reserve Fund and Minister Reserve Fund.

Other DFO Work Projects

- Prep for Board retreat with Nicole Duff and Amanda Alice Uluhan.
- Coordinating repairs including city permits for Sanctuary beam rot issue.
- Onboarding new Waldorf renters for Ed building and setting up monthly rent payments.
- Met with Green Task Force and discussed team and project scope with new findings on grants.
- Met with Policy & Governance to hear current status of those projects and team membership.
- Met with Grace Colton to review and discuss P&G new Board member training materials.
- Ordered sound abatement panels for Spring Hall and coordinating with Facilities on installation.
- Significant work behind the scenes managing and discussing financial and logistical aspects of Khasi Hills Trinkets & Treasures garage sale with staff and with Board Treasurer.
- With Budget Committee & SLT, working through wording going out to ministry teams on future fundraising procedures and ministry team budgets.
- Coordinated refresh to Ed building bathroom vanities and relied on Dianne for scheduling.
- Meetings: Staff, Board, Exec Committee, SLT, Finance Team, Financial Stewardship/Endowment, Facilities Team, Holly House Task Force, Policy and Governance, UUA Large Church DFOs.
- Finally scheduled short out-of-town vacation in August!

Facilities Maintenance, Repairs, and Upgrades

Dianne Upton, Facilities Manager, reports that the following work done on campus. Ongoing gratitude for Celil Cakmak who saves money by handling small repairs and upgrades around campus.

- Plumber repaired leaking sinks in North Room kitchen.
- Cosco replaced temporary compressor in Sanctuary.

- Celil repaired one of two broken lawn mowers so is able to continue mowing as necessary.

And Dianne also reports on events-related coordination and other tasks.

- Updating ACS scheduler with events through June 2024. Extending Zoom links/calendar entries/space rentals for internal groups and important dates through June 2024.
- Celil set up portable sound system for Sunday service use in front courtyard.
- Prepared agreements of Homeschool Enrichment (Waldorf) uses of Spring Hall and North Room and kitchen. Celil cleaned up E-101 in preparation for new renters. Coordinating with RE for clean-up and move-out of education building classrooms. Celil cleaned out RE cupboards in E-205 and E-206 per Amanda's request.
- Celil hung clocks in Education building per Amanda's request.
- Working with RE on fall quarter logistics. Coordinated with Amanda Alice about school year prep in the education building.
- Working with Martin Cox to arrange for classroom, TV cart and laptop for Family Covenant Circle monthly meetings.
- Celil and Dianne working with ECAM in preparation for their September 19 Candidate Forum in Sanctuary. Celil joined onsite walkthrough on August 15.
- Making arrangements with BOT team retreat to provide equipment for their meetings. Celil set up BOT retreat A/V equipment.
- Email to Marilyn Mayers Kristi Weir about use of ACE crew for PCA event.
- Reached out to Peggy Phillip about Congregations for the Homeless move to North Room/Sanctuary for their October stay at ESUC.
- Coordinating with Trinkets and Treasures team for building use and coverage during the sorting and sale hours. Celil removed all chairs and in Sanctuary and set up tables for Trinkets and Treasures. Celil brought down clothing racks from seasonal storage for their use and did a large amount of clean-up and set-up after the event.
- Coordinating with Sri Sathya Sai International Organization for Labor Day weekend event. Handled onsite visit and prepared rental agreement.
- Celil and Dianne acting as onsite staff during Ryther summer camp.
- Celil and/or Dianne onsite staff for Ryther Aspiring Youth summer camp all month.
- Prepared agreement for extra morning hours for Ryther (summer renters).
- Sent pictures and wrote email to Aspiring Youth/Ryther regarding messes left in classrooms and hallways. They cleaned up the following day. Coordinating with Ryther for fall programming space rentals.
- In conversation with Barb Shuman to hold a birthday party onsite.

Here are the monthly financial statements.

East Shore Unitarian Church
Statement of Financial Position

As of: Jul 31st 2023

Assets

Cash

1010 Checking - Chase	89,145.43
1025 Savings - BECU	49.71
1090 Petty Cash	200.00

Total Cash	89,395.14
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Investments

1130 Stock Donations - Schwab	80.99
1140 Endowment - Schwab 8692	104,356.34
1170 Endowment Schwab 7213	1,074,755.17

Total Investments	1,179,192.50
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Reserve Accounts

1370 Building Reserve Fund- BECU	24,000.00
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Total Reserve Accounts	24,000.00
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HH Sale Expense Receivable

1420 HH Sale Exp Rcvable - Legal/Eng	196,442.12
1421 HH Sale Exp Rcvable - Carrying Costs	1,962.32

Total HH Sale Expense Receivable	198,404.44
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Prepaid Expenses

1531 Seabeck Prepaid Deposit	6,000.00
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Total Prepaid Expenses	6,000.00
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Total Assets

\$ 1,496,992.08

Liabilities & Net Assets

Liabilities

Long Term Liability

2720 Damage Deposits - LT Rentals	2,750.00
2750 Building Loan	352,633.51

Total Long Term Liability	355,383.51
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Total Liabilities	355,383.51
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Net Assets

3100 Operating Fund Balance	(61,602.94)
3200 Building Reserve Fund Balance	24,000.00
3300 Endowment Fund Balance	1,179,211.51

Total Net Assets	1,141,608.57
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Total Liabilities & Net Assets

\$ 1,496,992.08

East Shore Unitarian Church
Statement of Activities - Summary

Date Range: Jul 1st 2023 - Jul 31st 2023 | Filtered by: Fund

Accounts	Actual	Budget	Actual	Budget	Annual
	Jul 01, 2023 - Jul 31, 2023	Jul 01, 2023 - Jul 31, 2023	This Year Year to Date	This Year Year to Date	Budget Jan 01, 2023 - Dec 31, 2023
Revenues					
Income - Donations	48,135.75	53,366.67	530,805.05	451,958.69	799,500.00
Income - Facilities Rentals	23,440.00	10,761.66	104,025.00	173,191.62	227,000.00
Income - Events & Pgms	749.00	2,100.00	74,968.50	94,200.00	104,700.00
Income - Other	127.95	50.00	39,443.10	38,100.00	76,100.00
Income - Fundraising	60.00	0.00	50,449.00	47,500.00	47,500.00
3-Designated Revenue	0.00	0.00	100.00	0.00	0.00
Total Revenues	\$ 72,512.70	\$ 66,278.33	\$ 799,790.65	\$ 804,950.31	\$ 1,254,800.00
Expenses					
Wages	47,057.14	48,863.17	325,423.52	342,042.19	586,358.00
Payroll Employer Portion	12,910.07	12,604.92	87,396.83	88,234.44	151,259.00
Professional Expenses	411.17	2,191.01	13,161.77	15,337.07	26,292.00
Contract Workers	910.00	1,189.58	4,550.57	8,327.06	14,275.00
Program Expense	3,073.28	2,972.51	76,378.99	95,807.57	115,570.00
Utilities	1,572.83	1,941.67	22,981.23	21,091.69	39,000.00
Facilities Expense	3,183.74	8,591.65	33,572.04	48,641.55	79,600.00
Business Expense	6,032.20	6,802.38	35,446.73	39,784.48	76,400.00
Office Expense	1,909.21	3,208.34	14,429.32	22,458.38	39,500.00
Fundraising Expense	0.00	0.00	13,596.00	12,600.00	12,900.00
Building Loan Expense	9,470.45	9,470.50	66,293.15	66,293.50	113,646.00
Total Expenses	\$ 86,530.09	\$ 97,835.73	\$ 693,230.15	\$ 760,617.93	\$ 1,254,800.00
Net Total	(\$ 14,017.39)	(\$ 31,557.40)	\$ 106,560.50	\$ 44,332.38	\$ 0.00

Director of Religious Education’s Report – Amanda Alice Uluhan

No Report Submitted

Membership Director’s Report – Nicole Duff

**Report from Director of Membership Development
 August 2023**

Worship Numbers

2023 *

- July 2: 87
- July 9: 104
- July 16: 83

- July 23: 88
- July 30: 95

2022 *

- July 3: 102
- July 10: 83
- July 17: 99
- July 24: 89
- July 31: 72

* Attendance calculated by adding 25% to Zoom logins, plus in person when applicable.

Visitor Attendance:

- July 2: 11
- July 9: 16
- July 16: 14
- July 23: 23
- July 30: 26

Membership

Current Membership: 334

- Passed Away: Warren Maruhashi (8/8/23)
- Returned: Nick & Michael Erber-LaPierre (8/13/23)

Pledging Friends: 37

On Pathway: 28 (9 of those are also Pledging Friends)

Membership Teams & Responsibilities

As we prepare for the fall, the SLT decided to transition to masks ENCOURAGED. I do think it's important to continue to have an environment of consent. This is from a new person to East Shore, shared with her permission: "This is a side note, but I was on the ESUC.org website yesterday and I saw a really awesome paragraph about creating a consent culture at ESUC for physical touch (near the bottom of the COVID protocol page). I've noticed the consent culture in action when I've visited in person, people ask before touching, and it's really helped me feel safer right away there. If I had been supported in creating consent culture at my former congregation I wouldn't have had to leave, and it was really nice to see it already in writing. I know it was written mainly to support people at risk for COVID, but I just want you (and ESUC) to know how supportive it feels for a survivor of sexual violence as well."

Beloved Conversations Among Task Force

Nothing new to report.

The 8th Principle

The team will submit a proposal for their Board agenda item.

Auction

Nothing new to report.

Membership & Coffee Hour & Technology

Salmon has been ordered for the Ingathering on September 10! Please sign up to help: <https://www.signupgenius.com/go/4090F4AA9A72FA0FC1-ingatheringsalmon> I also have postcards made for each household to have a personal invitation sent. Let me know if you would like to help write 10 postcards!

I have finished building the new Membership Development Team. Here is who is on it and what their areas of focus will be. We are always looking for people to help us do this great work!

- Welcoming Visitors (first visit to joining - be sure to include RE): **Ann Carlstrom**
 - Visitor Emailers
 - Visitor Callers
 - Visitor Tracking
- New Members (Years 1-3) **Susan McDonald**
 - Mentors & followers
 - Note: not all newbies want a mentor, so may just be someone who follows up with people regularly.
 - Help them make Connections (get them in groups, covenant circles, find volunteer joys)
- Member Engagement/Volunteering **Dave Baumgart**
 - Help fill positions in all teams
 - Oversee greeters, ushers, coffee hour
- Leadership Building (work with Nom Com): **Amanda Strombom**
 - Work with group to develop pathway to leadership
 - Work with nom com to encourage following the pathway to leadership
 - Help make opportunities to develop leadership
- Pastoral Care/Long Term (work with LPM): **Sue Yates**
 - Member letter writers
 - Keep in touch with Legacy/homebound Members
 - Work with LPM for when someone should become a Legacy Member

I had only 3 people attend my coffee hour training. I'm hoping more will come for the Realm App training on August 20 and the Usher/Greeter Training on September 24. As always, we can always use help with welcoming, ushering, and coffee: <https://www.signupgenius.com/go/4090f4aa9a72fa0fc1-usher> Any help in taking a shift or encouraging others would be greatly appreciated.

Lastly, I'm excited to say we had 10 people at the first Millennial Meetup! This group of 27-42 year olds had some great conversations and are ready to get involved and help lead East Shore into the next era! We hope to meet once a month.

Outreach & Website

I hope you saw the new t-shirt designs! The shirts will be available to purchase via Realm and in person on September 10. We will have examples of the shirts so people can see sizes and feel the softness! We chose the color navy to both go along with the UU the Vote color scheme, but also because we could get the same shirts in youth sizes. We are hoping parents will be excited to also get shirts for their kids! You can read more about it here: <https://esuc.org/new-east-shore-t-shirts-coming/>

Seabeck

Nothing new to report.

Welcoming Congregations

We are thrilled to announce that East Shore has been recertified as a Welcoming Congregation!!! Thank you to the team: Ron Douglas, David Langrock, and Nicky Woolwine with support from myself and Eric Lane Barnes. The team is now looking at what they will do going forward including some social gatherings for our LGBTQIA+ members and friends. We are also bringing in 3 new people into the group, all new to East Shore!



Women's Perspective

The group is looking for a new chair to lead the group. They are meeting soon to discuss plans for the coming year. Activities may be more limited, with a focus on the retreat and the Margaret Fuller Tea.

Communications & Social Media Metrics

Yelp for July 2023

10 Yelp Visits

1 User Leads
1 Website Visit
436 Impressions

Google My Business Report for July 2023

1,972 Profile Views
292 Asked for Directions
197 Visited Our Site
9 Called us

Google Search Console for July 2023

493 Clicks from Google

Top Performing Pages

- www.esuc.org (154)
- esuc.org (87)
- <https://esuc.org/upcoming-services/> (16)

ESUC.org Analytics for July 2023

* Google recently changed the way they capture analytics. Please bear with me while I learn this new system.

1,093 Users
1,000 New Users
1,717 Sessions
3,425 Page Views
1:33 Average Session

Tech

- 57.4% desktop
- 39.4% mobile
- 3.2% tablet

User Acquisition

- 57.9% Direct
- 39.8% Organic Search
- 1.3% Referral
- .5% Organic Social
- .5% Other

Top Viewed Pages

- ESUC.org home: 889
- Staff: 126
- Worship: 121
- Rentals: 119
- Upcoming Services: 107

Facebook: 982 Followers

Instagram: 278 Followers
X (Twitter): 61 Followers
Threads: 31 Followers

UUAMP Work

In my work with the UU Association of Membership Professionals (UUAMP), I will begin Board meetings in late August. I am working with the Board to bring in more task forces to allow the Board time to focus on our larger goals. I also recently was asked to contribute my thoughts to a new document from Jan Gartner in the UUA Office of Compensation about sensitive staff dismissals.

Respectfully Submitted by Nicole Duff, Director of Membership Development

Liaison Reports

8th Principle Team – Nicole Duff

This section contains the 8th Principle Team’s proposal to the Board for how to pursue anti-racism and anti-oppression work. This proposal is part of Discussion Item #3: How Board will continue Anti Racism / Anti Oppression / Widening the circle work. We hope you can read it and ask clarifying questions ahead of time so the time in the August BOT meeting can be spent on deciding if you would like to do any/all of the suggestions.

This proposal was written after the retreat with Julica’s suggestion to work on healing first in mind.

I’m happy to answer any questions about specific items via email leading up to the board meeting.

Thanks!

Nicole

8th Principle Team Proposal to the Board

The team would like to first say we support the decision, suggested by Julica Hermann de la Fuente, to focus on healing. We also believe doing this healing work will lead to better anti-racism, anti-oppression work. We do have some suggestions for how to ensure the work is still being done.

1. Continue meeting with Julica Hermann de la Fuente

We feel it would be important for the Board to work on their own accountability on these healing issues. We suggest you meet with her (via zoom) somewhere between once a month and once a quarter.

2. Participate in a book group on the UUA Common Read for 2024 “On Repentance and Repair”

We are hoping this book group can be led by the Right Relations Team and/or the 8th Principle Team, with (hopefully) participation by Rev. Maria Cristina. We think the Board would get the most benefit from doing this with the entire congregation, so you fully hear from all voices. We will also use resources provided by the UUA.

3. Have an 8th Principle/Right Relations Curious Lens Helper

We know this work is hard, and with you wanting to live into your goal of “Intentionally apply a multicultural, multi-generational, anti-racist approach and lens in all ministry team activities, program development, and other aspects of congregational life,” we want to offer support. We recommend having a member from 8th Principle or Right Relations come to each Board meeting and before any vote allow space for them to ask curious questions using this lens. The hope is that all questions will already be asked, but this would help you in this work. We want to offer this support so there is less work for the Board, while at the same time helping to make it a standard practice to apply a multicultural, multi-generational, anti-racist approach and lens in all votes and decisions.

Policy & Governance Committee – Grace Colton

Policy & Governance Board Report - August 2023

Consent Agenda - Nothing

Agenda - Nothing

Informational -

- 1) P&G has drafted a description of terms and positions for committee membership. It will be submitted with a 2024 Charter draft or sooner.
- 2) We had a discussion of feedback received about how congregational meetings are done. P&G expects to provide more written handouts before and at the next congregational meeting. We will consider recommending a voting app for people in-person to use. This would speed up the vote count.
- 3) Kirstie Lewis has resigned from P&G due to health and difficulty with the level of technology used by P&G.
- 4) Mary Anderson is beginning her final year on P&G this June.
- 5) P&G would appreciate referrals to it by Board members of new committee members.

Personnel Committee – Martin Cox

Personnel Committee Appointments

At the Board of Trustees meeting of July 27, 2023, the board acknowledged the need to fill two seats on the Personnel Committee being vacated by members Jerry Bushnell and Sheridan Botts whose terms expire(d) this summer. The board is asking current and past Personnel Committee members, the Nominating Committee, and Nicole Duff for suggestions of East Shore members who might be qualified and interested in serving on the Personnel Committee.

Development of SharePoint SLT Member Evaluation Process

A small team consisting of Martin Cox, Rebecca Chatfield, Deb Boehm-Davis and Jenny Newell are working on a project to develop a SharePoint site to manage and automate the SLT member evaluation process.

The SLT member evaluation process is performed each spring by the Evaluation Task Force (ETF) of the Personnel Committee.

Martin Cox worked with Jenny Newell on Friday August 11th to create an initial, empty SharePoint site named **SLT Evaluations** that will contain the folders used to manage the SLT member evaluation process. Permission to access this site will be carefully controlled, but, for the record, the URL is:

<https://eastshoreunitarianchurch.sharepoint.com/sites/SLTEvaluations>

It was an important first step. The team aims to complete and test the site before December of 2023 so that it will be ready for use in the Spring of 2024.

Next Personnel Committee Meeting

The ESUC Personnel Committee meeting normally planned for August will take place Tuesday, August 29, 2023.

Right Relations Committee –

APPENDICES

Appendix A: July 2023 Meeting Minutes

Board Members Present: Rebecca Chatfield, Nicole Duff, Amanda Alice Uluhan, Signe Lalish, David Langrock, Geri Kennedy, Martin Cox, Keely Cofrin Allen

Board Members absent: Taya Montgomery, Rev. Maria Cristina

Evelyn Smith joined the meeting at 4:15 PM

Visitors present: Grace Colton, Paul Buehrens, Ryam Hill

Meeting commenced at 3:30 PM PDT

Amanda Alice read the opening: [In our Circle Again](#) by Share Woodbury ([In Our Circle Again | WorshipWeb | UUA.org](#))

CHECK-IN

We each named a “great value” in our life.

CONSENT AGENDA

1. Approve the June 2023 BOT meeting minutes
2. Approve the board budget cost of \$42 for the Intercultural Development Inventory (IDI) and invite Taya and Keely to take the IDI
3. Approve the revised Policy 2.10
4. Approve the revised Policies 2.22 and 2.23

Keely moved to accept the consent agenda.
Geri seconded the motion.
The motion passed unanimously.

(Note re: Taya and Keely taking the IDI: Louise leaves for England September 15th so plan to do this before then.)

Discussion Item #1: How Board will pursue Anti-Oppression work

Nicole passed the talking point to Paul Buehrens who represents the 8th principle team. Full text of Paul’s remarks will be made available through Nicole. Partial notes below. Paul reported that the 8th Principle Team urges the board to work closely with the UUA and with the 8th Principle Team on anti-racism and anti-oppression work. The Article 2 revisions passed GA in June 2023 and will likely pass next year’s GA. The UUA is implementing the Widening the Circle recommendations. We are encouraged to work at three levels:

1. Individual work
2. Work at the institutional level
3. Work at the congregational level

The 8th Principle Team’s purpose is to support the board achieve its priorities. The time commitment proposals the team sent to the board were premature. The board needs to set its priorities and take up working with the 8th Principle Team after that.

Board and visitors discussed Paul’s remarks and anti-oppression work.

Nicole: More about Widening the Circle:
<https://www.uua.org/uuagovernance/committees/cic/widening> OR you can borrow a copy of the book from the ESUC library.

Nicole: Also, information about the work Grace has done with Widening the Circle here at ESUC:
<https://esuc.org/widening-the-circle-of-concern/>

Discussion Item #2: Nominating Committee Chair

David Langrock reported that in June, the congregation voted for the slate of 4 members of the Nominating Committee, and the board is responsible for appointing a chair of the Nom Comm. Beth Wilson was elected on the slate as one of the four members and has expressed willingness and ability to serve as the chair. If we appoint Beth as Chair we then would need a back fill one of the member seats on the Nom Comm.

Martin moved that the board invite Beth Wilson to take the role of chair of the Nominating Committee.

Keely seconded the motion.

Some discussion.

The motion passed unanimously.

David agreed to communicate to Beth the board's request for her to serve as chair of the Nom Comm.

Discussion Item #3: Personnel Committee Appointments

Martin reported that Jerry Bushnell and Sheridan Botts roll off the Personnel Committee this summer and the committee has notified the board that these two positions need to be filled. The purpose of this discussion item is to hear ideas about how the board would like this task to be accomplished.

Signe asked if anyone has asked the Nominating Committee to help. Martin reported no. The current members of the Personnel Committee know they can recruit new members. The board, in an effort to diversify, does prefer recruiting to extend beyond the acquaintances of the existing committee membership and therefore would like to ask the Nominating Committee to assist.

No motion was made but the board agreed that David (as board liaison to the Nominating committee) will let the Nom Comm know that we want their input to help staff our committees.

Discussion Item #4: Right Relations Team's Request for a voting board member liaison

Amanda gave a brief overview of what the Right Relations (RR) team does and what they have done in the past. Amanda is the staff liaison to the RR team. The RR team currently does not have a voting board member liaison.

RR started in 2017 during the interim minister's work. The work of RR has been instrumental in helping build more constructive answers to conflict and tension. Board policies about Right Relations, the Right Relations Committee and the role of a RR Facilitation Team are described in Section 5 of the Policies of the Board: [Policies-of-the-Board-2023_22_03.pdf \(esuc.org\)](#).

The request from the RR team is for voting board members to consider being their liaison. If this request can be addressed by September that would be great.

Discussion Item #5: Composition of the Budget Committee

Geri moved that the board appoint the following members to serve on this year's Budget Committee:

Rebecca Chatfield
Geri Kennedy
Claudia Hirschev
David Langrock
Signe Lalish
Ryam Hill
Rev. Dr. Maria Cristina

The motion was seconded.

Discussion included emphasis that this committee will meet fairly often over the next few months and attendance is very important.

Discussion also reviewed how at the June 2023 board meeting we amended the Policy 2.10 from six people to a "minimum of six" and whether that throws off the care and thought that went into the balance defined in the original wording of Policy 2.10.

Ryam shared some of her background serving on a lot of teams and committees over time including RE, Treasurer, Facilities, Bylaws task force, and nominating committee.

David shared his perspective that his role on the Budget Committee is more aligned with his membership on the Committee on Ministry than his role on the Board of Trustees.

The vote on the motion was called.

Five voted in favor.

None voted against.

One (Signe) abstained.

Discussion Item #6: Budget Committee's Communication to Ministry Teams re: fund-raising

Rebecca reported on the concern that inconsistency in fund raising for organizations external to East Shore places a burden on the budgeting process, can cause donor fatigue, and leads to energy being spread too thin. The inconsistency is that while some ministry teams submit budget requests, others request to raise money directly. We want to figure out a good way to get at this issue so it's fair, transparent and centers the good work of the ministries at this church. There is Policy 2.11.8 = the duties of the SLT to ensure fund raising

(Paraphrase) Policy 2.11.8 "the Staff Leadership Team will... Ensure that soliciting of donations and other fundraising by teams and committees are pre-approved by the Board; (2016)"

The budget committee is a board committee. The budget committee wants policy 2.11.8 to happen and be incorporated more into the budget process with the goal of creating more whole-church fund raising, more collaboration across the ministry teams.

Geri moved that the board direct the Budget Committee to work with the SLT to ensure that policy 2.11.8 is followed.
The motion was seconded.

Discussion followed. We heard reassurance that “we won’t abruptly change things, we just want to pull things together.”

Nicole reminded us that this policy was written in 2016 but the budget committee was formed much later. Passing this motion will enable Rebecca to send out notification to all ministry teams to say, “hey, we need your budget requests, the money should be raised through our operational budget.” We were reminded that the board still gets the final say, over the budget.

The question was called.
The motion passed unanimously.

Announcements:

Nicole: For the board retreat we’re doing a vegan chili potluck, please bring toppings.
Next day salad bar, bring one topping.

Nicole: In past years, the board has stepped up to help with the Salmon bake, I have a sign-up for that. September 10th is Salmon Bake.

Rebecca: we are in negotiations with a potential renter for some of the space in the Ed building.
\$7K/month

Process Reflection

David offered several reflections on today’s discussion.

CLOSING

Amanda Alice Uluhan read [The Freedom to Doubt](#), by Paul Stephan Dodenhoff ([The Freedom to Doubt | WorshipWeb | UUA.org](#))

Regular Board meeting adjourned at time 5:27 PDT

Minutes compiled by Martin Cox
Secretary, Board of Trustees
East Shore Unitarian Church
Bellevue, WA
July 28, 2023

Appendix B: UUA Compensation Guidelines

This appendix contains supplementary information for Discussion Agenda Item #1 at the next Board meeting on August 24th: Review UUA Compensation Guidelines. You are receiving this information far in advance of the next Board meeting because this is dense and will take some time to consider.

Earlier this year, the UUA released a set of recommendations for best practices for staffing compensation. Please spend some time perusing the link to the UUA main page about compensation. You can find a lot of orientation material and more helpful links including videos: <https://www.uua.org/leaderlab/congregational-salary>

- East Shore is **Geo-Index 6**.
- East Shore is **“Size Profile C”** church in membership numbers, staffing profile /**“Size Profile D”** church in operating budget (and probably also our facilities!)

After you have had a chance to absorb what’s provided in the UUA link above, review the below document again. There are six job LEVELS with different scope and authority.

https://www.uua.org/files/2022-11/Job_Level_Rubric.pdf

Then **as a final step, review the attached pdf showing the Salary Recommendations** for a Geo-Index 6 church for 2023-2024.

During the Board meeting I will spend a few minutes answering any general questions. It would be helpful to gauge the Board’s commitment to adopting this new general approach advocated by the UUA. Later in the evening, during Executive Session, I will share with voting Board members how our current ESUC staff compensation compares with these new rubrics and guidelines. **Please hold any questions about specific staff salaries until Executive Session, thank you.**

The discussion on compensation approach is relevant for the 2024 budgeting process happening now.

Thank you for taking the time to review this material prior to the August 24th Board meeting.

Rebecca

Minister/Executive I

Minister Tier

90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$71,700	\$79,800	\$87,800	\$91,000
Size B (120 to 230 Members)			
\$86,100	\$95,700	\$105,300	\$109,200
Size C (200 to 450 Members)			
\$103,400	\$114,800	\$126,300	\$130,900
Size D (400 to 800 Members)			
\$123,000	\$136,600	\$150,300	\$155,800

Geo Index 6

Be sure to review notes and key resources at bottom.

Program/Administrative Tier

90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$68,400	\$76,000	\$83,500	\$86,600
Size B (120 to 230 Members)			
\$82,000	\$91,100	\$100,200	\$103,800
Size C (200 to 450 Members)			
\$98,400	\$109,400	\$120,400	\$124,700
Size D (400 to 800 Members)			
\$118,100	\$131,200	\$144,300	\$149,600

Highlights and Reminders *(Links at right)*

- 1. Process is primary!** Our goal is to help congregations create and implement equitable and transparent pay policies and practices that demonstrate economic justice and keep congregations in right relationship with their staff. Be sure to read our Salary Process Guidance document.
- 2. New Structure for Recommended Salary Ranges**
This is a new approach. It may take some time for your congregation to fully live into it. Start with process and let the values of equity, transparency, and economic justice guide you. See resources at right.
- 3. Key Process Reminders** *(More in Salary Process Guidance document)*
 - Use the Ruler Method to place each employee within their range.
 - Local wage norms are an important consideration for some positions. Also check your area's living wage.
 - Rates are for 40 hours/week or full-time in your congregation.
 - Prorate for part-time or divide by 2,080 for hourly rate. Note that it may take a higher pay rate to attract part-time staff, especially for positions with very limited hours.

Key Resources

- Salary Process Guidance**
https://www.uua.org/files/2022/11/Salary_Process_Guidance.pdf
- Job Level Rubric**
https://www.uua.org/files/2022/11/job_Level_Rubric.pdf
- Congregational Size Profiles**
https://www.uua.org/files/2022/11/Size_Profiles.pdf
- Living Wage Calculator**
<https://livingwage.mit.edu>
- Congregational Salary Program page**
<https://www.uua.org/leaderlab/congregational-salary>

Minister/Executive II

Geo Index 6

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Minister Tier

90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$61,100	\$67,900	\$74,700	\$77,400
Size B (120 to 230 Members)			
\$73,200	\$81,300	\$89,400	\$92,600
Size C (200 to 450 Members)			
\$87,800	\$97,600	\$107,400	\$111,300
Size D (400 to 800 Members)			
\$104,500	\$116,100	\$127,700	\$132,400

Program/Administrative Tier

90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$58,200	\$64,700	\$71,200	\$73,800
Size B (120 to 230 Members)			
\$69,600	\$77,400	\$85,200	\$88,300
Size C (200 to 450 Members)			
\$83,700	\$93,000	\$102,300	\$106,000
Size D (400 to 800 Members)			
\$99,500	\$110,600	\$121,700	\$126,000

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Job Level Rubric
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Congregational Size Profiles
https://www.uua.org/files/2022-11/Size_Profiles.pdf

Living Wage Calculator
<https://livingwage.mit.edu>

Congregational Salary Program page
<https://www.uua.org/leaderlab/congregational-salary>

Director

Minister Tier

90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$55,800	\$62,000	\$68,200	\$70,700
Size B (120 to 230 Members)			
\$64,700	\$71,900	\$79,100	\$81,900
Size C (200 to 450 Members)			
\$75,000	\$83,400	\$91,800	\$95,100
Size D (400 to 800 Members)			
\$86,500	\$96,100	\$105,600	\$109,500

Geo Index 6

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Program/Administrative Tier

90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$53,100	\$59,000	\$64,900	\$67,300
Size B (120 to 230 Members)			
\$61,600	\$68,400	\$75,300	\$78,000
Size C (200 to 450 Members)			
\$71,500	\$79,400	\$87,300	\$90,500
Size D (400 to 800 Members)			
\$82,400	\$91,500	\$100,700	\$104,300

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Job Level Rubric

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Congregational Size Profiles

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Living Wage Calculator

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Congregational Salary Program page

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Manager

Geo Index 6

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90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$47,800	\$53,100	\$58,400	\$60,500
Size B (120 to 230 Members)			
\$53,600	\$59,500	\$65,400	\$67,900
Size C (200 to 450 Members)			
\$59,900	\$66,600	\$73,200	\$75,900
Size D (400 to 800 Members)			
\$68,000	\$75,500	\$83,100	\$86,100

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Specialist

Geo Index 6

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90% Expected Minimum	100% Midpoint	110% Expected Maximum	114% Special Situations
Size A (Up to 140 Members)			
\$44,400	\$49,300	\$54,300	\$56,300
Size B (120 to 230 Members)			
\$48,900	\$54,300	\$59,700	\$61,800
Size C (200 to 450 Members)			
\$53,700	\$59,700	\$65,700	\$68,100
Size D (400 to 800 Members)			
\$59,100	\$65,700	\$72,300	\$74,900

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Support

Geo Index 6

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Size A (Up to 140 Members)			
\$40,600	\$45,100	\$49,600	\$51,300
Size B (120 to 230 Members)			
\$44,600	\$49,600	\$54,500	\$56,500
Size C (200 to 450 Members)			
\$49,100	\$54,500	\$59,900	\$62,200
Size D (400 to 800 Members)			
\$53,900	\$59,900	\$66,000	\$68,300

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