

Our Budget is a Moral Document
Lakehead Unitarian Fellowship
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January 21, 2007

The title for today's message was inspired by Jim Wallis' work with the Sojourners organization to influence governmental spending in the United States. He repeatedly and doggedly works to remind the country that a budget is a moral document. Acting on his influence, a bit over a year ago, a contingent of 115 religious leaders and people of faith, including several Unitarian Universalist ministers, were arrested in Washington DC for bearing witness to the immoral choices evident in that federal budget – which offered tax cuts to the rich whilst slashing services to the poor. The Rev. Bill Sinkford, president of the Unitarian Universalist Association, responded to that situation with a statement that read “Moral values grow out of our calling as religious people to work to create the beloved community. Moral values instruct us to ‘love our neighbours as ourselves’ and always to ask the question, ‘Who is my neighbour?’ They (moral values) are fundamentally inclusive rather than exclusive, and they call on generosity of spirit rather than mean-spiritedness.” He continued by urging all Unitarian Universalists to stand with other people of faith and goodwill in demanding moral governmental budgets – budgets that direct resources towards those who need them most.¹

Today we're going to look at a budget much closer to home, and one that also requires us to carefully consider our moral positions.

You know, I've been asked numerous times how it is that I made a decision to enter the ministry. Many of you have heard this story, about how I was feeling stuck and unsatisfied in my work life, but this morning I want to tell it from a slightly different perspective, one that touched my pocketbook. I was seeing a career counsellor, looking for options, not feeling called *toward* anything, and I remember saying to my counsellor: “I don't know what I want to do, but I know I don't want to move, I don't want to go back to school, and I don't want to make less money.” Well, three strikes...

¹ http://www.uua.org/news/2005/051214_budget/index.html

The good news is, I don't feel like I struck out...rather, I feel that I hit a home run. But that doesn't mean that the change was easy or that it came without financial consequences. It was hard work, it was drawn out, I often felt that I was completely lost, and it took away the semblance of financial security I had. The career counselling process required me to look deeply at my history and my heart, while at the same time looking toward new possibility. Eventually that exploration brought me, not to a place of clarity about where I was going, but to a place of certainty that I could not stay where I was and move forward at the same time. I couldn't see the destination, but I could see that I had to step out and begin the journey.

It is recommended that when a new organization begins, particularly in the non-profit sector, that the budgeting process begin by clearly setting out goals and mission, estimating what is needed to accomplish those ends, and then figuring out how to find resources and to raise funds to finance that mission. This reminds us that a budget contains not only costs, but also income. We budget our income just as we budget our expenses. This is not the frame of mind I was in when I went to see a career counsellor. I did not have a clear mission (other than making a change) and my attitude about my finances was restrictive. At the beginning of that process, the only thing I was clear about was that I didn't want to give up my comfortable lifestyle, I didn't want to take any real risks, and I wanted a change in my life. I've heard that the definition of stupidity is doing things the same way over and over again and expecting the outcome to be different. That is what I was doing – waking up every day, dragging myself into the office, repeating my routine, and hoping that things would change.

I can't tell you exactly how I took the first step; I guess I can't even identify what the first step was. It may have been the simple awareness that I was unhappy. Something may have clicked in my conversations with my therapist. It could have been making the financial commitment to see a career counsellor. Or, it was a combination of a lot of small shifts that culminated in making a change.

Ultimately, I was forced to let go of my hold on my comfortable and predictable life. I can remember coming across something written by Thoreau in which he said, "I went to the woods because I wished to live deliberately...and not, when I came to die, discover that I had not lived." I guess that scared me more than anything...that I would come to the end of my life and realize that I had little but regrets. Now I can say...after a little cancer scare that has forced me

to face my mortality...now I can say that I do not regret my life, and that I believe that, when it comes, I will be able to welcome death peacefully.

Our ultimate objective is not to be able to welcome death without regrets, but to live life fully, and it would be a stretch to compare the life of Lakehead Unitarian Fellowship to a mortal entity. It lives because of you and will always live on because of the effect it has had on you, and on all those who have participated in its nearly fifty-year existence. Over that time, LUF has seen a lot of changes and taken many risks. Yet, a fear of change, and a fear of death, lurks in our hearts. You have poured life into this beloved Fellowship and it is completely understandable to want to protect what you have accomplished and created.

I feel a need for a disclaimer here: while I serve ex-officio on the Way Forward Task Force and the Board, and while I strongly support the recommendations of the Way Forward Task Force, I can't make any assurances that those recommendations are fool-proof. My agenda today is not to convince you to adopt a deficit budget. That is your work to do, or not to do. I leave it in your competent hands. And I will lose no faith in your collective wisdom nor will I be disappointed if you choose a different direction. My agenda today is to help you turn your eyes toward the future, to reach for the sky, and to focus on all that you want Lakehead Unitarian Fellowship to be. Ultimately, I hope that you'll carefully consider how to attain that vision.

As I've already implied, how we look at our budget, our finances, our comfortable position, has a lot to do with how clearly we can see the future. Just like the bunnies in the story today², we need a goal...a reason to collect our money and a vision for how it should be spent. Our budgeting begins with our purpose for being, and you are the ones who must determine that purpose. If our best action is to maintain a balanced budget, that's okay. If our highest purpose is preserving a comfortable position, one in which we needn't stick our heads out too far, then I truly encourage you to name and embrace that purpose. Claim it. See how it feels. "Lakehead Unitarian Fellowship exists to embrace diversity; explore spiritual, religious, ecological and humanist values; and enrich the lives of members, friends and society at large...as long as it

² Bunny Money, by Rosemary Wells

doesn't require very much of us." I don't know about you, but for me, such a purpose is not a very compelling reason to choose to be a part of a religious community.

I'm probably going too far again. Perhaps this message cuts too close here, on the same day as the budget ratification meeting. But, we have talked quite a bit this year about what it is that we stand upon – and it is this question that I pose to you today. What does Lakehead Unitarian Fellowship stand for? Why does it exist? How can it best accomplish its goals?

Bruce read earlier, from "Spiritual Literacy," that vision has to do with morality. As Jon Kabat-Zinn stated, "Our vision has to do with our values, and with our personal blueprint for what is most important in life." I believe that our budget is an important part of that moral blueprint. What does it tell us about what we are trying to accomplish? Your Board of Directors, has taken a bold initiative (though certainly not the first for LUF) to begin the budget process from the viewpoint of a vision and has proposed that you adopt a budget that is, frankly, scary. Not only does it ask for a huge financial commitment toward professional ministry, but it asks that we choose to give away some of our resources for community and world-focused outreach, resources that already feel scarce. While I believe that generosity begets generosity, and that committing a small percentage of our resources to help those less fortunate is the right thing to do, I acknowledge that it feels risky. A lot is being asked of you.

Some say that a minister's job is to comfort the afflicted and to afflict the comfortable. Perhaps I'm afflicting you all. I know that this is not a particularly wealthy congregation. But while resources are not unlimited, they are also not scarce. There's an old joke that goes like this: When a crowd gathered around his booth, the strongman at the county fair took a lemon, cut it in half, and squeezed both halves dry, draining the juice. He then told the crowd, "There's a hundred bucks for whoever can get another drop." Several burly young men lined up to give it a try – to no avail. Finally an elderly woman clutching her purse said she'd take a turn. The strongman laughed, and handed her the two halves. She held them, and squeezed – and out came another cup of juice. Everyone oohed and aahed in amazement. "How did you do it?" the

strongman asked. “I’m the church treasurer,” she said as she pocketed the money and walked away.³

I have to believe that resources, at least resources that will be directed toward justice and kindness, are more abundant than any of us know. Some of you are fidgeting, feeling uncomfortable, feeling that you are being asked to give more, when you already give what you can. (And let me not overlook the fact that we each also budget our resources of energy and time and talent. These are crucial assets, just as important to attaining our vision.) One thing I know for sure is that we humans don’t readily give of ourselves to things that are not priorities for us. Is LUF’s work a priority? If not, what can we do to make it so? Perhaps more importantly, how should the mission of this congregation be intertwined with the values we hold in our personal lives?

This is the essence of morality – carefully considering our choices and our commitments as we continue on a journey of compassion and justice. A budget is simply a list of choices – choices that will indicate clearly what is most important to us. It may seem, that given our fixed expenses, we really have few choices. Sometimes, unexpected costs...like needing to do the laundry, or seemingly whimsical spending, on beauty or teeth that glow in the dark...sometimes such unexpected expenses come up. But that shouldn’t deter us from the goal. When we begin with a focus on the limited funds we have to spend, particularly without a clear vision, then we can only accomplish those things that our money can stretch to cover. However, if we begin with the vision, then we have at least the possibility, of growing funding to match that vision.

Each life contains multiple commitments...to family, to relationships, to jobs, to causes. You each have both the right and responsibility to prioritize those commitments in a way that makes sense for you. Not everyone will make the same decisions, and no one can judge or evaluate the choices of another person. But, if this congregation is to fulfill its stated mission of enriching your life, it should help you make important decisions as you continue on your search

³ From “Small Talk: Strengthening the small UU Congregation” December 2006
www.nhvt.uua.org/publications.htm

for truth and meaning, toward finding and living your life's purpose. In this way, it might take on the role of the career counsellor...guiding, suggesting, aligning your choices with the desire of your heart. I remember questioning the money I was spending on career counselling, but now I see those dollars (perhaps thousands of dollars) as money well spent. There may have been other ways to get out of my rut, or to climb the mountain (just as there are always many paths to the top) but the one I chose worked for me, and I am grateful.

So...what will work for this community? What will get us all out of the 'rut' of feeling that the building is inadequate, that our social justice work is not significant enough, that our light and presence in the larger community is too dim? How do we avoid the burnout we experience from expending our energy and not seeing the results we'd like to see? What can we do differently in order to see different results?

As the saying goes, different results require different actions. A minister and a building are not ends, but means. LUF does not exist in order to have a permanent called minister. Hopefully LUF does not exist in order to have a nice and accessible space in which to gather. Neither a minister nor a building, in and of themselves, will truly enrich the lives of "members, friends, and society at large." Neither will, by virtue of their existence, "embrace diversity and explore spiritual, religious, ecological and humanist values." Yet they are each means to this end...each a possible, maybe even necessary way, to fully embrace our purpose and mission.

There's no denying that in order to approve a deficit budget, Lakehead's income is going to have to grow. A deficit budget is not sustainable, or fiscally responsible. We always have to touch the earth. On the other hand, a balanced budget may not reflect the fact that this community wishes to do more, to be better, to have more of an impact on the world. Money is simply a vehicle to help us to be the best that we can be...it's something that we exchange our life energy for...and in turn we spend it to make our commitments more visible in our lives and our world.

If you honestly feel that you are getting a 'fair swap' for your investment in this community (to use Diane Walker's terminology from the excellent presentation she did for the

Board this past week) – if you are seeing appropriate results for appropriate input – then there is no need to change how we operate. It’s a balancing act – knowing when to give more in order to see better results, and when to pull back because the results aren’t there. Only you, collectively and individually, can assess that and make the appropriate moral choices.

It’s admirable, heroic perhaps, to take action, to even be arrested, in protest of *governmental* spending choices. But it’s just as important, and just as heroic, to make difficult moral choices about our own personal budgets, and our annual budget right here at Lakehead Unitarian Fellowship. To do so requires a lot of us – it requires us to do the hard work of discerning the right thing to do, to find ways to implement the necessary changes and to stand committed to our choices.

We are the heroes of our own stories. I look forward with great anticipation to the unfolding of the next chapter in LUF’s story. You are writing a page in it today. Blessed be and amen.