



Joys & Sorrows during Shelter-in-Place

Annual Report FY 2019-20

Annual Meeting: May 17, 2020

Unitarian Universalists of Central Oregon:
seeking meaning, celebrating life,
and serving the spirit of love and justice in our world.

TABLE OF CONTENTS

- AGENDA: Annual Meeting, May 17, 2020
- Minutes of Annual Meeting, May 18, 2019
- Annual Reports
 - Minister
 - President
 - Staff
 - Fellowship Administrator
 - Building Superintendent
 - Congregational Life Facilitator
 - Director of Religious Exploration
 - Events Manager
 - Music Director

For clarity, functions overseen by the Board of Trustees are “committees”; functions of program and ministry overseen by the Minister are called “teams”.

- Adult Spiritual Development Team
- Aesthetics Team
- Art Resource Team (ART)
- Chalice Lighters Committee
- Endowment Committee
- Facilities Systems
- Finance Committee
- IT/AV Committee
- Leadership Development Committee
- Library Team
- Membership Team
- Pastoral Care Team
- Religious Exploration Team for Children and Youth
- Safety and Security Committee
- Social Justice Steering Team

- Bethlehem Inn
- Environmental Justice
- Fireflies
- Greater Community Collection
- Immigration Solidarity Network
- REACH
- Wildcat Wizards Tutoring
- Stewardship Committee
- Sunday Volunteer Team
- Women's Connections
- Worship Team
- Board of Trustees Nominees for FY 2020-21
- Draft Budget FY 2020-21

FY2019-20 ANNUAL MEETING AGENDA

Call to Order	Susan Kinney
Chalice Lighting	Reverend Rudolph
Opening Remarks	Susan Kinney
Recognition of Outgoing Board Members	Susan Kinney
Nominees for Elected Positions	Leadership Development
Stewardship Report	Linda Johnson
Treasurer's Report	Sylvia McFarland
Proposed Budget FY 2020-21	Sylvia McFarland
Explanation of Voting	Susan Kinney
Adjourn	

UUFCA ANNUAL MEETING MINUTES
May 18, 2019

Annual Meeting

18 May 2019

Called to order 10:17

Marty Rudolph briefly reviewed the work of the Board over the past year. The Board has reviewed and approved 22 policies in the past year, including a policy on the review of the ministry of the congregation. Chad Leonard did a lot of work on this policy based on existing UUA policy. Thanks to the Growing Together task force, we moved to two services in the fall. This winter, we had a process to create a vision statement that we hope the various teams and committees will use in their long-range planning. Marty thanked the Board members for their hard work.

Michael Carr reported that the stewardship campaign has raised \$384,000. He thanked the members who responded to the stewardship survey, which was very helpful. Responses centered around people wanting to know more about the financial health of the congregation, the budgeting process, and program outcomes. Going forward, the Stewardship and Finance Committees will work together to address these requests.

Sylvia McFarland gave an overview on the budgeting process. She reviewed the FY 2018/19 estimated/actual budget and the approved 2018/19 budget (see attached). We anticipate needing \$38k from the reserve fund rather than the budgeted \$85k. This is because adult RE and rental incomes were higher than budgeted. Miscellaneous income is anticipated to fall short of expectations. There was a decrease in staffing expenses for the year. For FY19-20, we are budgeting for an increase in pledging but are also expecting an increase in rental income. We are also budgeting for staffing increases, although we were unable to give the staff raises because of the decrease in pledge income. With the increase in event income, there will be an increase in event payroll, although this is passed through to the nonprofits using the building. We need to budget for Scott's planned sabbatical in the future and for the current DRE working more of the year. We need to have some painting done on the building, but we anticipate that there will be enough money in the building repair fund for this year to pay for this, so we have not budgeted for this for next year. We have also not budgeted for any additional to capital reserve fund for asphalt maintenance for next year. Social justice was also hoping to have an increase in their budget, which we were unable to support. The UUA has changed the basis of the dues rate to basing it on annual operating expenses which significantly increases our dues rate. Currently increases are limited to 10% per year until we reach the rate based on our operating expenses. Our new event manager is excited about increasing our event income while maintaining our values. In addition to increasing income from event rentals, the Board, Finance Committee, and Stewardship Committee will work to improve our stewardship messaging to improve our future stewardship income. Also, Sylvia noted that there is a question on the ballot asking to take up to \$41,000 from the Operating

Reserve if necessary, which we have not done previously. Sylvia answered questions from the congregation about the budget. During the questions, Sylvia reviewed again the Operating Reserve fund and its current value.

Leslie Koc from the Leadership Development Committee reviewed the nominations for the various positions that were up for election today. This is the third year that the LDC has presented names for the elected positions. This year, the LDC is also presenting names for the LDC and Endowment Committee. Biographies of the nominees are in the annual report. She recognized Max Merrill and Greg Byrne, who will be finishing their terms this year. She acknowledged the members who will be staying on the Board for the next year. Finally, she introduced Mark Steinberg, Vice President nominee, and John Lawton, At-large nominee. She introduced the new (Dave Floyd, Joan Landsberg, Pat Lenahan) and continuing (Herb Blank, Greg Byrne, John Coltman, Linda Crouse) members of the Endowment Committee. Dave Floyd is fulfilling the last few months of a former Endowment Committee member who has left the area. Finally, Leslie acknowledged the members of the LDC who are completing their second 3 year term: Michael Carr, Amy Falkenrath, and Marean Jordan. She reported that the LDC hopes to bring on two new members, Nancy Stevens and Maggie Machala, prior to the next meeting to be voted on at the January meeting.

Current membership is 297. Quorum is 20% which is 60.

132 ballots returned including 13 absentee ballots. 119 present.

Budget 130 yes, 2 no

Slate of Board Members 132 yes, 0 no

Slate Leadership Development Committee 131 yes, 1 no

Slate of Endowment Committee 132 yes, 0 no

Submitted by:

Erika Beard-Irvine, Secretary

MINISTER'S ANNUAL REPORT 2019-20

Submitted by Rev. Scott Rudolph, Minister

As I hear stories from Unitarian Universalist ministers across the country, I have seen the pattern that the pandemic is accentuating what was already there. Healthy churches are staying connected and helping each other through. It has been quite something to witness how our congregation has responded. I am seeing compassion, care, flexibility, and commitment. I am not surprised that the good people of UUFCO rallied to the times, but I am forever grateful.

Don Hartsough was once reflecting on the history of change in this congregation. He shared how the fellowship was always relocating to different, changing ministerial leadership, and growing in its understanding of what it means to be a congregation. "Change is in our DNA," he said. This has allowed us to dream, create, and transition onto a new building. It has enabled us to deal with real growth in the past years with a good amount of grace and flexibility. We are tapping into this strand of our DNA again as we respond to the world around us as we are being called to shift and change yet again.

In the past month, we have done nothing less than re-envision how congregational life happens. Volunteers reached out to every member and friend to check in. We moved worship to a live broadcast from the fellowship and then to the online platform, Zoom – live from home. And speaking of Zoom, it has become the primary way that we now relate to each other for congregational meetings and events, which was not a small endeavor. All this has been possible because of the dedication and adaptability of our members, friends, and our incredible staff.

And we are not done innovating yet. We will continue to explore new ways of connecting to each other and deepening our spiritual lives. We now know that it will be a long time before things look something like they used to. Even then, everything will be a little different after having come through this experience together. That is how we will get there – together.

Thinking back on our congregational life this past year seems as if I am looking far back in time. What happened before a month ago when Gov. Brown announced the stay-at-home order seems like a different life altogether. So, I went back and read old board minutes and my reports to the board. We did a lot this year.

Much of our work was guided by our vision that we created at the close of our last year. We began integrating it into the work and life of our fellowship. It has been a helpful road map for me personally, for our board, and for many teams and committees.

We have good cause to be thankful to our congregational leaders this year. Our Board of Trustees has served the church well and moved us forward. There are always the random things that happen during a church year that require the board to adjust and address them. A special thanks to Susan Kinney for serving as our Board President. She brought thoughtfulness and a commitment to relationship. She believes deeply that trust is primary in congregational life. You trusted her to lead, and she has. Sylvia McFarland has served as our Treasurer for three years now and has done a remarkable job at creating processes and support for our financial wellbeing. If you see her, thank her. Pause. Then thank her again. Linda Johnson led our Stewardship efforts and also established

new norms around communication, transparency, and connection – not to mention that our Stewardship campaign flew past our goal by more than \$28,000!

Our board and board committees are certainly not the only place we see leadership in the congregation. Sometimes it might be heading a team or committee. It could be organizing a Spiritual Development offering or heading out on a lake for a paddle. Maybe it's hanging an art show or making a meal for Bethlehem Inn. Whether leading from within a committee, leading a team into the community, or grabbing some folks to pull up some cheat grass here at the fellowship, there are many ways to lead.

It's not all about leading though. And you don't have to show up every week in our office to help out like our Office Volunteers do to make a difference. (Thanks Trisha Bell, Ella Chatterjee, and Joyce Sayle!) Anyone and everyone who offers of themselves into this community to help is a part of the shared ministry at the heart of our church. Anyone who is a part of our community has cause to be thanked, whether you attended a rally with a bullhorn, picked up some litter in the parking lot and no one saw you do it, or you found yourself at the fellowship on Sunday morning more often than not. Thank you.

Our staff looked a lot different this year. Leora Mauck joined us as our Fellowship Administrator & Bookkeeper. If you have worked with Leora you already know, but she brought an amazing set of skills with her into the position as well as a good measure of joy. Jonathan Beil is our Events Manager and from day one began seeing things with a different eye. He is great to work with and knows the world of events. And finally, we have now enjoyed Peggy DeArmond as our choir accompanist and piano player extraordinaire. She has quickly become part of the fabric of our Sunday mornings, and it is great fun creating worship with her. All three of these folks entered into what was already a staff like no other: Chela, Parker, Mark, and Dana. Work is as much about whom you are working with as it is what you are doing, and I feel so very lucky to be working through the week with these people.

Dana Regan will be concluding her two years of interim work with us in June. She has done a solid job of creating structure within our program and supporting us as we moved to volunteer-led Sunday morning RE. A special shout out to all of our wonderful RE teachers! We are beginning interviews right now for a permanent DRE. Exciting times ahead.

If you have been hanging around the fellowship, you probably know that we have some awesome Youth. They have created bonds in RE, they led our congregation in the Commit to a Kid Climate Action Project.

Only a couple of weeks before things shut down, A Child's Garden preschool began renting our RE space. This was the result of many years of exploration, work, and conversations. It started well, and we look forward to when we can welcome them back in.

There was a lot of justice work by the congregation this year. You can read about that in that section of this annual report. As for me, I tried to reach out from the fellowship attending rallies, speaking at events, meeting with state legislators; I created and led a weekend workshop in Corvallis called "Being a Man in a #MeToo World", and formed relationships with various justice-

seeking groups in Bend. I am doing my best to be in the community representing UUFCO and our values.

Another thing I do away from our fellowship is lead the newly formed Interfaith Progressive Clergy Group. This year our relationships deepened, and we began to support each other in different ways. A highlight was participating together with many religious communities offering solidarity to the Jewish community for a Shabbat service during Martin Luther King weekend.

Speaking of worship, we have had a great year together. Unconventional perhaps, but a great year. Our online platform has proven that our connections to one another go beyond seeing each other at our building on Sundays. After a series of congregational Worship Conversations held by our Worship Team, we began making some shifts in our liturgy to make it more streamlined and spacious. That project was just getting going before we moved to our new medium. It will be interesting to see how current events will alter how we do worship into the future. I imagine that we will continue to offer online services once we return to in-person worship. We don't yet know when or what that will look like. But we will adapt as necessary.

We gather not only for worship but also to celebrate life when those we love die. This year we shared in the joy of life and grief of death for Ginny Heroux, Paul Halberstadt, and Sy Migdal. They will be missed while their impression and spirit remain with us.

We don't grow for growth's sake but because we believe in our community and its life-saving, life-affirming message. Our membership is now at 326. Before the pandemic, our Sunday morning attendance was often above 300. We had record numbers in our Religious Exploration program. Christmas Eve service saw near 600 cross our threshold. An evening Winter Solstice Service created by the staff was widely appreciated by 120 people. We do not know if it will be a slow crawl back to these numbers in the coming year or if the wider community will be even more hungry for ways to connect and deepen their spiritual lives. Only time will tell. But we will be here continuing to share our message of love, acceptance, justice, and community.

We go into this next year uncertain of what it will look like. But we have shown that the connections we have made in the past and new ones formed are a grounding force in our lives right now. We are all making this up as we go along. Our future is going to require of us a good deal of creativity and flexibility. Change is in our DNA. And as I look at this community today, it is clear that so, too, is love.

With love,

Rev. Scott

PRESIDENT'S ANNUAL REPORT 2019-20

Submitted by Susan Kinney, Board President

Board of Trustees: Susan Kinney (President), Marty Rudolph (Past President), Mark Steinberg (Vice President), Erika Beard-Irvine (Secretary), Sylvia McFarland (Treasurer), Chad Leonard (member at large) and John Lawton (member at large)

Purpose: To ensure that resources are used efficiently and effectively toward fulfilling the UUFCO mission and to plan for the future.

Accomplishments

- The Board spent the first half of the year focusing on policy review, managing the finances and supporting the work of Board committees (Stewardship, Endowment and Facilities) through active participation in their work. Additionally, we engaged in deep conversation around two main topics – membership and the requirement to pledge, and how to incorporate funding for Social Justice into the overall budget of the church. Both of these issues directly relate to our newly adopted vision in relation to welcoming new people into our community and supporting social justice in our fellowship.
- The conversation related to membership and pledging is ongoing. The Board is committed to ensuring that our fellowship remains accessible and welcoming to all, including those who are unable to financially support the church. We acknowledge that ensuring the financial health of the congregation is important and needs to be balanced with our responsibility to be a community for all.
- The Board appointed a task force to look into best ways going forward to incorporate funding for social justice programs into the overall church budget. The work of the task force has led to a much more significant commitment to social justice programs in the upcoming budget for fiscal year 2020/2021. The task force continues to work on a plan for how the funds will be allocated within the Social Justice team.
- Since March, the Board has been focused on supporting the staff and minister in their work to keep the fellowship running during the COVID-19 crisis. We quickly needed to change much of how we do church, with little experience to guide us. I could not be prouder of our minister, our staff, the Board and all of the congregation who stepped into this new landscape – with grace, patience, understanding and goodwill. As we learned how to do Sunday services from home, how to stay connected through small groups on-line, how to care for each other through the efforts of our Pastoral Care Team and a caring team to provide hands-on assistance, the Board was behind the scenes making decisions about how and when to make changes to daily church life. We have worked with staff to quickly respond to government-sponsored loan funding opportunities, to craft guidelines for rentals including the pre-school and to commit to keeping our staff employed. We navigated through the work of adopting a budget in unprecedented financial times – with acceptance of future uncertainty but without fear.

I want to thank the entire Board for their work this year and especially those who will be leaving the Board in June. They are:

- Marty Rudolph, Past President
- Sylvia McFarland, Treasurer
- Erika Beard-Irvine, Secretary

Respectfully submitted with deep appreciation for all of you,

Susan Kinney

UUFCO Staff Reports

FELLOWSHIP ADMINISTRATOR ANNUAL REPORT 2019-20

Submitted by Leora Mauck, Fellowship Administrator

Purpose: Administer the business of the church including budget management, insurance, purchasing, maintenance contracts, and church communications. Collaborate with the Event Manager to coordinate congregational and community use of the building. Work closely with the Building Superintendent to supervise contracts and contractors in the maintenance of the building. Provide graphic design support to staff, committees, and teams, including coordination with outside printers, and act as web master. Act as bookkeeper to process and record transactions involving donations, purchases, payroll, collection of accounts receivable, payment of bills, providing financial reports, and administration of the financial aspects of the pledge drive.

Accomplishments

- Successfully learned the people, roles, technology, and practices of UUFCO, including CRM and bookkeeping software. I am most proud of the relationships that we have nourished as staff and am blessed by the friendship and camaraderie of my co-workers and the congregation.
- Implemented record-keeping strategies for event rental income to facilitate reporting.
- Created a new graphic design for email communications and migrated to MailChimp to garner significant cost-savings and enhance use of Breeze CRM.
- Learned the building well enough to provide administrative support to the Building Superintendent and Facilities Committee, and intelligently administer maintenance contracts.
- Worked closely with Stewardship Committee on the design for the annual pledge drive, and supported the campaign with record keeping, reporting, and communication with congregants.
- Scouted, vetted, participated in group interviews, negotiated, and coordinated the contract to bring preschool to UUFCO. Made various government contacts to ensure low financial impact of fees and permits.
- Quickly responded to the global nCoV pandemic to move UUFCO services and meetings to online platforms. Trained staff, volunteers, and a large number of congregants to use Zoom to continue the business of the church and provide deepening connections during the time of crisis.

Future Goals

- Implement comprehensive social media strategies to grow our younger audience.

- Work closely with A Child’s Garden and the new DRE to ensure a mutually beneficial relationship.
- Learn the finer details of fund accounting. Refine bookkeeping practices and possibly change software to increase efficiency and improve the accuracy and speed of Board reports. Welcome the new treasurer, Fletcher Chamberlin, and build a collaborative relationship with him.

Challenge: Working from home is a significant challenge for me as I seek to carve out time for each of my expressed tasks; to create intentional space for interacting with my co-workers; and to balance my home office with my home and family.

BUILDING SUPERINTENDENT ANNUAL REPORT 2019-20

Submitted by Parker Doelling, Building Superintendent

Purpose: **Maintain and manage a safe and clean facility.** To facilitate, model and support a community of welcome, appreciation, service and life-enhancing connections among congregants.

Accomplishments

- The biggest accomplishment is with the help of Leora and the Facilities Systems Committee we now have a fantastic service provider to maintain and troubleshoot our very complex HVAC system. The past two work parties have also been huge successes.
- Currently as I write this we are in the middle of the Covid-19 situation and I'm keeping the building looked after and getting some long awaited punchlist items taken care of. I really enjoy the responsibility of taking care of our worship space.

Future Goals: My main future goals are recruiting to help finish a list of projects in the building and continue learning all the dark corner of the building systems to better keep the ship running.

CONGREGATIONAL LIFE FACILITATOR ANNUAL REPORT 2019-20

Submitted by Chela Sloper, Congregational Life Facilitator

Purpose: To facilitate, model and support a community of welcome, appreciation, service and life-enhancing connections among congregants; schedule and support congregational events and celebrations; during COVID-19 ensure emergent needs are met by volunteers; establish and maintain opportunities for communication among congregants.

Accomplishments

- Coordination and leadership for our annual fall women’s retreat has successfully been passed to a sub-team of Women’s Connections.

- The weekly Fill Your Cup coffee discussion continues to be well-attended, both prior to the pandemic circumstances and as we continue to meet virtually in Zoom.
- The winter Family Spaghetti Dinner and Talent Show – second annual using this format – was well-attended and a wonderful way to learn more about our members and friends. This was one of many collaborations with the RE program and families.
- Held our first Remote Zoom Live Talent Show as we began our third month into the coronavirus shelter-in-place. Truly an all-ages event!
- Enjoyed Fourth Annual Back to Church night in September.
- Our first annual Winter Solstice Celebration provided a lovely celebration of the season and the ancient New Year marker as winter welcomes the return of light (in the northern hemisphere!). Dana Regan led the planning and organization of the event, and laid a firm foundation for this celebration to be enjoyed in the years to come.
- Other holiday traditions carried forward: an all-day “Deck the Halls” event (Christmas decoration): trees raised and lights put up during the day, the trees decorated and a light supper enjoyed in the evening: a fun collaboration with Religious Exploration. On the Sunday before our Christmas Eve services we offered everyone the opportunity to decorate Christmas cookies.
- Established CV Helping Hands: an able and willing crew of individuals who are available to do shopping and other errands for those in at-risk populations during the coronavirus pandemic.
- Supported the five Soul Matters groups throughout the year, both before and after the shelter-in-place order. So grateful these groups continue to meet using the Zoom platform.
- Appreciated and remained available to support the ongoing Good Times activities which provide diverse opportunities for fellowship and connection outside of our more traditional congregational gatherings.
 - Camping Group
 - Card Night
 - Circle Suppers
 - Hiking (or snowshoeing during winter)
 - Kayaking
 - Yarn Connection (Knitting)

Challenge: Of course, we are all facing the unknown of what congregational life will look like as shelter-in-place restrictions are eased or lifted. Until that occurs, we will continue to adapt to our being “together apart”. As a community accustomed to the warmth of being together, we are having to find ways to continually **seek meaning** and **celebrate life** through online platforms and the chance meetings with one another.

DIRECTOR OF RELIGIOUS EXPLORATION ANNUAL REPORT 2019-20

Submitted by Dana Regan, Interim DRE

Purpose: Children and youth thrive in a loving, religious community grounded in Unitarian Universalist values and faith development; who find a spiritual home in the fellowship and take action in the larger community; learn with joy and connection while being honored for who they are.

Accomplishments

- This year we used age appropriate UU curriculum for each of our three classes: Creating Home and Wonderful World for PreK-Grade1, Holidays and Holy Days for Grades 2-5, and Coming of Age for middle schoolers. We had adequate teaching volunteers for those classes and our nursery staff was full. We hosted or assisted many family events including, Back to
- Valentine's Day and ART night.
- Our attendance numbers skyrocketed from 27 last church year to 63 this year – a 57% increase! This can be attributed to many things including: enthusiastic teaching volunteers, meaningful teacher training, fabulous welcoming teachers and families, as well as good support from the DRE.
- Our final goal was to have strong support for DRE hours even with budget cuts from last year. Many thanks to the congregation in general and to Rev. Scott Rudolph in particular for providing adequate staff hours to promote the hours needed to build a program.

Future goal: The Settled DRE and the RE Team will meet in the summer to plan goals for the next church year.

Challenge: Obviously, the novel corona virus will offer increased challenges to providing in person religious education to our children and youth.

EVENTS MANAGER ANNUAL REPORT 2019-20

Submitted by Jonathan Beil, Events Manager

Purpose: The event rental department oversees all outside rentals of UUFCO.

Accomplishments

- The most significant accomplishment within the event rental department for the 2019/2020 fiscal year is the creation and implementation of the disposable/single use product ban. The congregation deserves tremendous credit for not only approving and adhering to this policy, but for the significant financial investment in purchasing a full complement of glassware, china, and flatware. The UUFCO's new smallware inventory (for up to 220 guests) eliminates the need for disposables, and demonstrates UUFCO's commitment to our clients, the environment, and the event staff.

- The disposable/single use product ban supports UUFCO’s mission in so many ways. The smallware inventory is included with the rental pricing which enhances both our clients’ bottom line and UUFCO’s rental value. The money non-profits save increases their capabilities to serve our community. The ban additionally displays UUFCO’s commitment to the environment. The smallware inventory eliminates the demand for disposable products. Recycling and composting decrease the waste we generate, however the greatest contribution we can make is to simply not manufacture and purchase single use disposable products. Just think how many plastic cups and forks we have not used in the past year...hundreds if not thousands! The disposable/single use ban contributes to the immediate health and environment of our community and for future generations.

Future Goals: The expansion of summer wedding rentals is the largest project the event team is working on. Booking ten weddings through the summer months would be ideal. By limiting the number of large summer events, we can strike a balance between maximizing rental revenue, preserving the building and grounds, and a being a good neighbor to those near us.

MUSIC DIRECTOR ANNUAL REPORT 2019-20

Submitted by Mark Hickman, Music Director

Purpose: To provide music that enhances our Sunday worship services.

Accomplishments

- Last year I spoke about the large changes that the choir went through as we went to two services. Little did I know how much change we would experience this year!!!
- Before the virus hit, we were struggling with the challenge of having more singers in the choir than we had chairs on the stage. We tried adding a third set of riser platforms, but it altered the look and feel of the stage too much to continue. In the future, we will need to continue to look for creative solutions to handle the “problem” of too many choir members. I am confident that we can make it work, no matter how many people wish to sing with us.
- We are continuing to mix in some familiar songs, and a large amount of new music. Roughly half the pieces we sang this past year were new to this congregation and to this choir. I continue to talk to the choir about “stretching capabilities,” and they have stretched beautifully and happily this year.
- Peggy DeArmond joined us this year as the choir accompanist and primary church pianist, and she has been a wonderful addition to our musical community. Both in practices and on Sunday mornings, Peggy adds much more than simply a great talent for playing the piano. I have been thankful to have her as my partner in creating a meaningful musical experience for the fellowship this year.
- Two of our choral anthems this year included contributions by the young people in our fellowship, as well as congregational singing. The response has been positive, and I look

forward to finding ways to occasionally include young people in our singing.

- The choir has continued to meet via Zoom during our social distancing time, but there is not a technical solution to singing together live while all being in our own homes. We are just beginning to learn about ways to record music to sing “together” in our services.

Reports of Teams and Committees

ADULT SPIRITUAL DEVELOPMENT TEAM ANNUAL REPORT 2019-20

Submitted by Kathleen Harrington, Chair

Committee Members: Kathleen Harrington, Chair; Rachelle Indra, Stace Rierson, Rosemarie Maurer, Alan Hilles, Anne Yost, Patei Dittman

Purpose: Provide opportunities for members and friends to explore and deepen their spiritual lives

Accomplishments

- This year our team organized and sponsored workshops including The Enneagram and Relationships, All's Well that Ends Well, and Harvesting Your Life.

This supported our vision by providing activities to nourish the spiritual growth of our congregation's members and friends.

Future Goals

- We have initiated planning to sponsor a four workshop series to underscore the importance of "Living the Welcoming Congregation." This series will explore the ideas of Equity, Diversity, and Inclusion.
- We have made plans to sponsor a year-long book group, studying "A Year to Live" to offer a healing supportive process toward a gradual completion of all that lies behind and a clear-eyed hopeful entrance to whatever may lie ahead. Yeah, baby!

AESTHETICS TEAM ANNUAL REPORT 2019-20

Submitted by Rev. Scott Rudolph

Members: Virlene Arnold, Julia Christoferson, Dale Clark, Dennis Lazzar, Joe Maier; Rev. Scott Rudolph

Purpose: To maintain and protect the vision for our building, to present an attractive, informative, and welcoming environment for members, friends and visitors that is visually and spiritually pleasing.

In her blog *The Aesthetics of Joy*, Ingrid Fetell Lee writes, "[T]hese aesthetics of joy have deep effects. There's an emerging body of research that shows that our surroundings have a profound influence on our well-being.... Aesthetics break through in ways that rational appeals do not. It travels from the senses to the emotional brain and stirs both body and mind."

Those of us who know UUFCO as our spiritual home understand that the aesthetics of our building and grounds have a deep impact on the quality of our experience in both overt and subtle ways.

The beauty of this place and its influence is also conveyed to us over and over by the outside groups who come to use our facility for fundraisers, events, and celebrations. None of this is an accident. In 2012, this congregation set forth certain aspirations that were used to guide the realization of this sacred space.

Aspirations for Our New Home

- Warm, Inviting, and Welcoming
- Nourishes Our Spirituality
- Supports Connections Within Our Congregation
- Encourages Life-long Discovery, Curiosity, and Creativity
- Respectful of and Connected to Nature
- Imbued with Natural Light and Fresh Air
- Exemplar of Meaningful Sustainability
- Gracefully Adapts to Our Growth
- Enduring and Easy to Maintain
- Highly Functional and Universally Accessible
- Maximizes Value Within Our Resources
- Serves Our Greater Community
- Reflects Unitarian Universalist Principles
- Simple, Elegant, Beautiful, and Timeless

It is our hope that these aspirations not only served to guide the creation of our building and grounds but that we continue to keep these alive as we live into our future. At the close of the last church year, Dale Clark stepped down in her role as the chair of the Aesthetics Team. We are all grateful to Dale for her leadership in the area of Aesthetics. The Aesthetics Team, the Board of Trustees, and Rev. Scott then began a conversation to discern a sustainable model for going forward concerning succession of leadership for the Aesthetics Team and a process for making aesthetics decisions at UUFCO.

In most of our teams and committees, we offer leaders the freedom to bring their own ideas and style as they guide their area of governance or ministry. In considering how the building affects the experience of all who cross our threshold or roam our grounds, we decided that our normal rotating method of leadership applied to the Aesthetics Team might not result in a consistent path forward.

Again, we can turn to Ingrid Fetell Lee. “Style relates to taste and what’s current. Aesthetics has to do with the fundamental sensory experience of the place that you’re surrounded by. There’s a deeper core to aesthetics.” The concern was that rotating leadership would bring with it competing, subjective preferences and styles that could continually be in tension over time.

We hope that our building evolves with our ever-growing congregation in an organic way. And, we also want to maintain the integrity of our building and continue to be grounded in our original

aspirations.. In the hopes of continuity over time, the Aesthetics Team, the Board, and Rev. Scott agreed that Rev. Scott would take the leadership role in our aesthetic deliberations with ongoing input and conversation with the Aesthetics Team.

Rev. Scott doesn't usually lead ministry teams in the congregation, but it was decided that the management of the aesthetics of our space required an original solution. Rev. Scott has been here for a while now, learning about the building, its origins, its design and has steeped himself in the spirit of this place. He has a commitment to that "deeper core of aesthetics." If you ever have ideas or questions about our physical space, please bring them to Rev. Scott or to a member of the Aesthetics Team – Virlene Arnold, Julia Christopherson, Dale Clark, Dennis Lazzar, and Joe Maier.

This year we oversaw several projects such as new benches and a table in Linus Pauling. This has enhanced both the visual beauty and the functionality of this room. The solution to our over-crowded name tag holder came in the way of a work of art by Will Nash that was mostly a gift to the congregation. We are currently working toward gender identity inclusive restroom signage, moving the brochure racks to a more accessible place, and creating a piece of art that speaks to our UU identity. A Memorial Garden structure has been planned and is underway in an effort led by Ellen Atkin. Dennis Lazzar oversaw a group of volunteers to coordinate holiday decorations by planning and engaging the congregation to install exterior snowflakes, interior paper stars, live trees, greens, lights, and paper chains.

John O'Donohue once observed in *Beauty: The Invisible Embrace*, "Some of our most wonderful memories are beautiful places where we felt immediately at home. We feel most alive in the presence of the beautiful for it meets the needs of our soul... Without beauty the search for truth, the desire for goodness and the love of order and unity would be sterile exploits. Beauty brings warmth..." Our fellowship space was built with this beauty in mind and with the spirit of love and possibility as its foundation. We will continue our tradition of caring for our magnificent fellowship home with an eye toward beauty and sustainability so that it may serve our congregation and the wider Central Oregon community into the unseen future.

ART RESOURCE TEAM ANNUAL REPORT 2019-20

Submitted by Sue Wilhelm, Chair

Members: Grace Kennedy, Susan Carr, Paul Bennett, Karen Maier, Ellen Atkin, Kristina Zeigler, Virlene Arnold; Sue Wilhelm, Chair

Mission (Purpose):

- Bring Art to life within UUFCO through exhibits and events
- Engage members and the greater community
- Working in harmony with our UU values

Accomplishments

- We have orchestrated outreach for, Installation of, and receptions for 7 changing Art Exhibits, one involving in-house participants (Remembrance of Things Past), 5 involving open public submissions, and one solo show featuring the work of Ted Gladu.

This supported spiritual/life nourishment through the Arts and welcomed new people into our building and hearts.

- We also orchestrated the well-attended "Art for All" intergenerational hands-on dinner event in cooperation with RE.

This involved our all-ages diverse community in authentic connection through the Arts.

Future Goals

- Streamline our show schedule and continue to improve communications to be more accessible within and without UUFCO. We are now publishing our yearly schedule so participants have months to plan and create work as desired. We are including UUFCO's administrator in scheduling to reduce the amount of misunderstandings and double-booking that has happened in the past.
- We created a data base for communicating with past participating individuals and groups . A goal is to keep this updated, and learn to use it more effectively for outreach.
- To continue bringing diverse, inclusive, high quality, and thoughtful exhibits and events to our fellowship and the wider community.

CHALICE LIGHTERS COMMITTEE ANNUAL REPORT 2019-20

Submitted by Annis Henson, Ambassador

Purpose: congregational education, promotion, and coordination for the Chalice Lighters program. This voluntary fundraising opportunity assists congregations in the Pacific Northwest UUA region.

Accomplishment: Our Chalice Lighter active membership of about 50+ was maintained thanks to the Leadership Development Team's Committee Day in the Fall. I participated with a table display. Sufficient new people signed up to replace those who dropped out, died, or moved.

Our Vision Statement is supported because our Chalice Lighter program provides another significant relationship beyond ourselves that connects us with other UU Northwest congregations. New people were welcomed by joining the program after learning of its mission. Chalice Lighters is certainly a way of serving mutually.

Future Goals

- Mutually serving other UU congregations in need could mean that all UUFCO board members become Chalice Lighter members in the new 2020-21 congregational year. As our

Ambassador, I welcome your consideration. Forms can be emailed by me during this Covid19 Interlude.

A personal note from Chalice Lighter Ambassador: I annually state my need to find a replacement for this task. Since I understand social justice to include assisting other UU congregations, if another person tried out this task, the mission of Chalice Lighters would be achieved with greater success. I am enjoying being on the Greater Community Collection committee, rather than entering a 7th year (?) as Chalice Lighter Ambassador.

Annis Henson

ENDOWMENT COMMITTEE ANNUAL REPORT 2019-20

Submitted by Linda Crouse, Chair

Members: Linda Crouse, Chair; Herb Blank, Greg Byrne, Dave Floyd, Joan Landsberg, Pat Lenahan, John Coltman, Marty Rudolph (board liaison)

Purpose: To manage and grow the long term savings for UUFCO

Accomplishments

- Our major accomplishment this year was to work on our Statement of Purpose. We spent extensive time discussing this topic, how the endowment fund might be used in the future and how we might grow the endowment. The draft statement of purpose was provided to the Board for review, and focus groups were held for members of UUFCO. We recommended to the board that no distributions be made until the endowment fund reaches a larger value (\$750,000 to \$1 million). As of April 10, 2020, the endowment value is \$362,000.

This work supports our vision statement because we discussed how the endowment could potentially support new programs at the fellowship by providing seed money. We also discussed how we might provide seed money for other programs in Central Oregon and beyond consistent with our mission. The endowment is invested in ESG (environmental, social and governance) funds consistent with our mission.

- Preliminary work done in preparing a brochure for the endowment fund to provide more information for members.
- Quarterly reports were provided to the board discussing investment performance and other work being done by the endowment committee. The endowment fund is invested in stocks broadly for long term growth and in Certificates of Deposit. The committee is monitoring the investments to make sure that all categories remain within their target range in accordance with our Investment Policy Statement during this time of extreme stock market turmoil around the world.

Future Goals

- To hold an educational event(s) for the congregation related to tax planning, estate planning and investments. We would like to encourage all members to contribute to the endowment fund in any amount. The endowment is not just for major gifts or estate bequests.
- To complete our work on the brochure for the endowment fund. To review our other governing documents to determine if any changes are needed. To continue to meet quarterly as a committee.
- To transition leadership of the Endowment Committee since four of the current members will be reaching the end of their terms on June 30, 2021. To encourage members to join the Endowment Committee starting with the 2021-22 church year.

Challenges: The Covid-19 pandemic is affecting investment performance and our ability to get together for educational events.

FACILITIES SYSTEMS ANNUAL REPORT 2019-20

Submitted by Vernon Threlkeld, Chair

Members: Lewis McFarland, Robert Hedeem, Jim Huguet; John Lawton, Board liaison

Purpose: Oversight of Maintenance and Repair of our facility and related mechanical and electrical systems, in coordination with and support of our staff, specifically Parker Doelling, Building Superintendent, and Leora Mauck, Fellowship Administrator.

Accomplishments

- A goal last year was to see that the snowmelt system on the north side of the building would be functional. With the help of the design engineer and the contractor, aided by John Lawton, this has been accomplished after several years of struggle.
- Maintain and protect the building siding, which is an ongoing requirement. We also have a carpenter, found by Parker, to do the annual repair of holes caused by birds.
- Arranged for a new Preventative Maintenance agreement for a firm (Northwest Control Co.) that we believe will be much more responsive than the previous HVAC contractor. They will provide quarterly maintenance for the extensive catalog of complex equipment needed to operate our facility in a comfortable and efficient manner.
- The exterior Mitsubishi heat pumps/condensers are key components for the heating and cooling of our facility. These units have twice had leaks / damage thought to be due to ice damage. Even though our warranty (now ended) helped reduce the cost impact, the repairs were still expensive. After much discussion by the Committee (working with Parker), the Board approved a contract with the above HVAC firm (NCC). Pan heaters will be added at

the bottom of the units to prevent ice buildup, and added to the top of the equipment will be snow / hail guards to protect fan guards and coils. The work will be done soon.

- The Committee provides oversight and input on other on-going repairs, as well as supporting Parker Doelling with certain tasks or coverage in his absence.

New Volunteers: We were pleased to have two new (and excellent) volunteers, Bob Hedeem and Jim Huguet, step up to help us replace two 'retiring' members. And thanks, too, to Lewis McFarland for continuing his work on the committee.

And Thanks to Staff: On the behalf of the Committee, our thanks to the excellent support of Parker and Leora to keep it all rolling.

FINANCE COMMITTEE ANNUAL REPORT 2019-20

Submitted by Sylvia McFarland, Chair

Members: Sylvia McFarland, Chair; Dick Barber, Larry Price, Herb Blank, Fletcher Chamberlin, Trisha Bell, and John Coltman

Purpose: Assists the board by leading and guiding our budgeting process, spending and approval processes, financial investments, and annual financial reviews.

Accomplishments

- This year, we have worked to make the financial health of the Fellowship more transparent to our members, by holding two congregational meetings about the budget (the annual and semi-annual meetings). In addition, we have contributed articles to the monthly newsletter.

These efforts, along with the hard work of the Stewardship Committee have resulted in a more successful Stewardship campaign. The increase in pledges has allowed us to reward our staff with deserved compensation increases, take better care of our building, and provide funds for our Social Justice efforts. All of these are necessary to support our mission.

- We have put together a budget based on our projected income from pledges, rental income, and several additional resources. Our committees and staff (including Rev. Scott) had input into the priorities reflected in this budget. We celebrate all who contributed to our budget.

Future Goals

- Continue to increase the understanding of the committees, staff, and members of the budgeting process and financial circumstances of the Fellowship.
- Increase the growth of income to adequately staff the church to support our growing

membership.

Challenge: The growth of the Fellowship has required and will continue to require new tools and processes for Financial Management.

IT/AV COMMITTEE ANNUAL REPORT 2019-20

Submitted by Mark Hickman, Chair

Member: Mark Hickman, Chair; Aaron Coe

Purpose: Maintaining and planning for a functioning set of equipment and infrastructure for UUFCO computing, communications and AV.

Accomplishments

- IT: Besides making sure that the basic computing equipment and infrastructure continues to work for our ever changing needs and supporting the office 365 configurations that support our uufco.org email system, we scrambled to help support the sudden and unexpected transition to online services as part of the corona virus social distancing response. Learnings from this time are likely to spill over into our regular lives in the future, but it is too early to say exactly what this means. Budget submissions did not include any particular changes based on a post-virus future, but I expect that there will be some things like streaming services support that we will want to fund next year.
- AV: Maintenance of and training for our AV system is now primarily the responsibility of Parker, with Aaron providing backup. Our main learning this past year was that some of our highly expensive AV equipment can fail, and that when it does it exceeds our typical annual repair budget. Two of our projectors failed this past year, leading to roughly \$10k in unbudgeted expenses. In the future, we agreed that this kind of major equipment failure would be covered out of our capital repair fund, reinforcing the importance of continuing to put money into this fund to be prepared for major building system failures.

Future Goal: Continue to support the IT and AV needs of UUFCO, considering both function and cost.

Challenge: UUFCO has a complex set of equipment and capabilities in both the IT and the AV areas, and a limited amount of expertise. We have gotten by with more volunteer work than paid professional work for the last few years, but we may find ourselves needing to pay for professional services in the future.

LEADERSHIP DEVELOPMENT COMMITTEE ANNUAL REPORT 2019-20

Submitted by Amy Falkenrath, Co-Chair

Members: Amy Falkenrath and Michael Carr, Co-Chairs; Marean Jordan

Purpose: The LDC identifies resources and provides ongoing education, development and support for current and prospective congregational leaders. It serves as the nominating committee for open Board positions and other positions where a vote of the Fellowship is required.

Accomplishments

- Throughout the year the LDC provided supportive leadership services for UUFCO committee chairs, team members and aspiring UUFCO leaders. This included three Leadership Collaborative Workshops/Forums, an October 2019 UUFCO Committee Fair, and committee coaching throughout the year. We solicited regular feedback from participants after the Committee Fair and workshops to strengthen our processes and focus our leadership offerings.

These learning opportunities for leaders supported our UUFCO vision of engaging congregants in authentic relationships and spiritual growth and living out our values through mutual service.

- This year the LDC conducted our first Annual Leadership Development Committee Retreat, which allowed us to map out a comprehensive plan for the upcoming church year that would support Fellowship leaders in aligning their work with UUFCO's vision.
- Each LDC member initiated and conducted one or more monthly Relational Conversation with UUFCO congregants.

These conversations allowed us to get to know our diverse and growing community better and connect individuals with nourishing and meaningful activities and roles in the congregation.

Future Goals

- Establish a continual improvement process for all LDC endeavors, both within the committee and in the larger leadership community. Continue to review, evaluate, and document LDC internal processes.
- Grow the LDC membership. Support each other in our own growth and development as LDC members by utilizing UUA resources for independent and individual leadership development training.
- Seek and disseminate additional supportive methodologies and resources for UUFCO committees, leaders, and future leaders.

Challenges:

There are challenges inherent in accomplishing all of the previously listed goals, but primarily, the challenge will be in maintaining balance in completing our work in a thoughtful and intentional way

while also working through and evaluating our current processes and individual growth plans. This will require detailed planning in advance to make sure that all areas are being reviewed at regular intervals and nothing is slipping through the cracks.

LIBRARY TEAM ANNUAL REPORT 2019-20

Submitted by Mayme Trumble, Chair

Members: Mayme Trumble, Chair; Anastacia Compton, Sara Mesaros

Purpose: To support the congregation by providing resources focused on our principles, sources and spiritual traditions and values.

Accomplishments

- The UUFCO Library completed a survey of UU church libraries done by Wilfrid Laurier University Library, 75 University Avenue West, Waterloo, ON, N2L 3C5. We are now an officially recorded Unitarian Universalist library.
- Religious Exploration Director Dana Regan organized and catalogued the children's books in a new catalogue easier to understand for RE.
- All the church archives have been gathered and given a home in the Margaret Fuller conference room.

Future Goal: The library is organized by the Dewey Decimal system and it is difficult for members to sometimes locate books quickly for service or by simple topics. The goal will be to add a spin label that denotes topics.

MEMBERSHIP TEAM ANNUAL REPORT 2019-20

Submitted by Trisha Bell, Chair

Members: Trisha Bell, Chair; Mayme Trumble, Daelene Schwartz, Ella Chatterjee, Donna Dobkin, Lee Ann O'Leary, Rebecca Miller; Chela Sloper, Congregational Life Facilitator

Purpose: Educate newcomers about our Unitarian Universalist faith, with the goal of folding them into our congregation.

Accomplishments

- Membership Team was able to hold two series of two orientation classes, which resulted in 44 new members, bringing our official membership to 318 (as of April 2020). We are planning to conduct another series of classes in May using Zoom, and hope that we will get many participants during this time of social distancing and isolation.

- We held one New Member Ceremony in the fall, and had the second on the calendar when this stay-at-home time landed. Hopefully this second Ceremony will occur shortly after we are all together again.
- The team also sponsored our second annual “Munch and Mingle” event in August, which was attended by 25 of our newest members. A good time was had by all, and we will plan for the third annual M & M when we are able.

PASTORAL CARE TEAM ANNUAL REPORT 2019-20

Submitted by Rev. Scott Rudolph

Members: Ellen Atkin, Joyce Burk Brown, Jim Dobrowski, Susan Hickman, Wendy Howard, Jameson O'Neal

The Lay Pastoral Care team will provide support with an atmosphere of safety and compassion, and be a visible reminder of UUFCO’s care, concern, and connections. The team acts as an extension of the pastoral ministry of Rev. Rudolph seeking to offer care and companionship to the congregation. Our goal remains to make sure that no one “falls through the cracks” and that all congregants know they can turn to the team for support. The team continued its ambitious project of trying to touch base with every member this year once by phone just to “check in.” If you need pastoral care or know of someone who does, please do not hesitate to reach out to one of us or to Rev. Scott Rudolph. It is an honor to be with members and friends of the church in times of sorrow and joy as we contribute toward the work of being a caring community.

RELIGIOUS EXPLORATION TEAM FOR CHILDREN AND YOUTH ANNUAL REPORT 2019-20

Submitted by Megan Michell, Chair

Members: Dustin Fanning-Painter, Erika Beard-Irvine, Jazlyn Halberstadt, Megan Michell, Tara Breitenbucher; Dana Regan, Interim Director of Religious Exploration

Purpose: Our Mission: The Religious Exploration Team for Children and Youth will support the Director of Religious Exploration and the RE program; create a culture of safety, RE policies, goals, and budgets; evaluate curriculum and the program to improve and grow RE; and champion the RE program within the larger fellowship.

Accomplishments

- What happened last year?

We nourished lives and connections through our Sunday programs, family dinners, and participation in congregational events. We continued with our RE program for pre-K through middle school at 9 a.m., and high school at 11 a.m. Dana Regan continued with Children’s Chapel for each age group. We did expand our teacher volunteers and saw amazing creativity and dedication in our Sunday programs. Some of our youth have also been participating with the choir. We also had amazing performances from each age group

for the Christmas Pageant, and participated in Bend's Christmas Parade. Chela and Dana piloted a very successful Solstice Service, with almost 200 in attendance. Middle schoolers worked with mentors this year and had a few overnight experiences. We prepared food for and participated in Family Art Night and the No Talent Show. Our family dinners also included a Halloween Event and Valentine's Day Event. Though summer camp is something we are still interested in, we did not have the bandwidth to start at this time.

In the spirit of service, and our social justice and environmental values, we have worked to help our world and people in our community. We have continued our Backpacks for Bend food drive program, collecting over 300 pounds since we started. We also participated in the Guest at Your Table program. Our bake sale for the Fireflies program raised over \$180. Our middle schoolers started a program to help us calculate, and reduce, our carbon footprints. We also welcomed A Child's Garden pre-school program to share our space, increasing much-needed childcare options in our community.

In this unusual time of meeting together while apart, we have pivoted to on-line meetings with the different age groups. We have had on-line pet parades and given virtual tours of forts created in our own homes. Dana has sent out lessons and resources for families.

The search for a settled RE director has been posted. We will be sad to say goodbye to Dana in June, and are so grateful for her leadership and dedication to the program, and her willingness to delay her retirement!

- Last year's goals
 - We are exploring the idea of a summer camp this summer and looking at expanding next year. We are also looking to revise our approach to family dinners.
 - In 2019-2020, we will commence our search for a settled RE director.
 - For this coming year, we want to recruit and train more volunteer teachers and assistants for the RE program.

Future goals

Finalize search and welcome settled RE director and continue to seek meaning, celebrate life, and serve the spirit of love and justice through our RE programs.

SAFETY AND SECURITY COMMITTEE ANNUAL REPORT 2019-20

Submitted by Don Hartsough, Chair

Members: Herb Blank, Judy Hurlburt, Al Johnson, Dustin Painter, Vernon Threlkeld; Don Hartsough, Chair

The primary function of the committee during the 2019-20 church year was the creation and implementation of a program for protecting the congregation during Sunday services from aggressive intruders. We gave it the name "Front Door Monitor Project". The object was to place a trained volunteer near the front door during the service. In the event an intruder – or any personal

suspected of being an intruder – attempted to gain admission to the facility, the monitor could block entrance for the person and notify the police. In addition, the monitor had the capacity to block entrance to the sanctuary and the Religious Exploration area to buy time under the intruder would encounter police.

Thirteen volunteers were oriented and trained to become front door monitors. We could not cover each and every service, but we managed with that contingent to cover many of them. The Fellowship was deeply appreciative of the work of these congregants.

The cooperation of the ushers during the services, and Parker Doelling at the sound system, in protecting the sanctuary has been greatly appreciated. Fortunately, no incident has occurred during the period of time related to this report.

A personal note from the chair: I have led this committee since early 2015 and feel now that it is time for new leadership and a fresh perspective. In addition, health issues interfere with my ability to meet the responsibilities of being chair. Therefore, I am stepping down from chairmanship, but am more than willing to continue with the Front Door monitor Project for the foreseeable future. The addition of Parker Doelling to the church's staff has been a great support to the committee.

Don Hartsough, Chair

SOCIAL JUSTICE STEERING COMMITTEE ANNUAL REPORT 2019-2020

Submitted by Larry Price, Chair

The Social Justice Committee supports a large, central part of UUFCO's program, accounting for about one-third of the mission of the church, as described in our mission statement: "Seeking meaning, celebrating life, and **servicing the spirit of love and justice in our world**". It works to implement the seven Unitarian Universalist principles in our work in the society around us. Committee leadership comprises a chair (Larry Price) and Steering Committee (Sue Clarke, John Horwich, Leslie Koc, Christine Walsh, Anastacia Compton, Ginny McKee/Barbara Belzer, and Ken Wilhelm). The Minister typically attends meetings of the Social Justice Steering Committee and the Board has listed Social Justice as a growth priority.

Seven ongoing activities (described in individual reports below) form the core of the work of the Social Justice Committee. The committee strives for broad participation of the UUFCO congregation in the core social justice projects and in the exploration and initiation of new projects within Social Justice when threshold levels of interest and energy are reached. A Social Justice service was organized with the Minister in November to broaden understanding of our program and its spiritual underpinnings.

The year has been eventful for the Social Justice program. Ongoing activities continue successfully (see specific reports below). In addition, Environmental Justice had a significant reboot, with an enthusiastic group of participants. And REACH, a new program for the homeless, emerged from over a year of discussions by an interfaith group initiated by the UUFCO Social Justice program.

Much of the work being done for Social Justice relies on volunteer effort from UUFCO members and requires minimal funding from the Board. Two exceptions at present are the Fireflies program of providing books to school children to help them keep reading during the summer break from school; and the new Interfaith REACH program of outreach and case management for those experiencing homelessness. Fireflies has engaged in vigorous fundraising from members and from businesses in the community, as well as applying for grants from foundations. In its first year, the one ending in June 2020, REACH was the beneficiary of a Greater Community Collection offering, which was sufficient to fund its first 6 months.

As other programs may emerge that also require significant funds, the model of *ad hoc* fundraising is not expected to scale gracefully. Recognizing this, the Board has been considering new models for funding Social Justice and, since January, has convened a special task force consisting of 3 Board members and 3 representatives from the Social Justice community. While in this process, the task force has consulted with the Board and the Social Justice Steering Committee. Although the Task Force conclusions are not final, there is good consensus already that UUFCO should work toward essentially full funding of all Social Justice programs from the church budget over a period of a few years, so that Social Justice becomes fully a part of the program of the church and, as such, does not have to regard its funding as an add-on. A possible modification to this goal comes particularly from Fireflies, which finds important community value in its annual Fireflies FLASH dinner and fundraiser. Since full funding in the budget was anyway not possible for the coming year, this question of possible continued fundraising activity was left for future discussion.

Based on an interim report from the SJ Funding Task Force, the Finance Committee and the Board included substantial new funding for Social Justice (over 7 times what was provided in the current church year), while still not being able to meet the full amount requested for Social Justice. The task force is continuing its work with the focus now on a general framework for allocating the funds available to Social Justice in any given year.

Bethlehem Inn
Contact: Leslie Koc

In this long running (over a decade) program, 20-26 monthly volunteers prepare and serve a home-cooked meal each month at Central Oregon's homeless shelter, Bethlehem Inn. Highlights of this church year included moving our food service activities (and those of other volunteer groups) to the new Bethlehem Inn commercial kitchen that accommodates serving single and family residents separately. More than in past years, volunteers who were trained in the Shadow Food Coordinator position took on the Food Coordinator role to rotate the responsibility. Six of the twelve dinners were managed by new Food Coordinators. The average number of meals served increased to 135 since the completion of the new Bethlehem Inn facility. As a festive footnote, Bethlehem Inn returned to serving the Thanksgiving dinner this year (one of our Thursdays)

For the future, we hope to facilitate sign-ups two to three months in advance., to reduce the stress of last minute recruiting. We also hope to include in our work an annual UUFCO youth volunteer

month. An ongoing challenge is keeping the handwritten sign-ups at the UUFCCO kiosk in sync with the online signups.

Environmental Justice

Contact: Anastacia Compton

Environmental Justice has had a significant reorganization and restart, since the former leader, Allison Wells, left Bend last summer. Over 60 people from UUFCCO attended organizing meetings starting in November, deciding to organize into 5 subcommittees focusing on Public Policy, Education, Youth, Inner Climate (spiritual aspects), and Individual Action. Connections have been made with outside Climate action groups, in addition to holding meetings of those at UUFCCO.

All subcommittees have met frequently and are planning projects that will often involve bringing information to UUFCCO at Community Hours between services on Sundays. The Youth Subcommittee, which is focused on working with our Religious Exploration youth on environmental projects, worked with middle school RE students to offer Carbon Calculator programs on tablets or laptops during the Community Hour for 4 successive Sundays in February and March. Roughly 110 adults answered the questions and determined their CO2 footprints. Many contributed leaves to a tree in the UUFCCO entry hall, outlining their commitment to actions to reduce their footprint. The Education subcommittee and the Policy and Legislation subcommittee supported the youth Carbon Calculator project by setting up informational tables to provide ideas and options for the adults who had just received their footprint.

The Inner Climate subcommittee made an altar to the animals impacted by the Australian wildfires that was set up as part of the commit to a kid project. In addition, contact was made with an organization which offers free online workshops and videos.

Goals for 2020-2021 include organizing an environmentally themed service with Rev. Scott, and carrying through on the planning being done by each of the subcommittees. The Inner Climate group hopes to hold a workshop in which people can create a sense of hope and purpose around the climate crisis.

Fireflies

Contact: John Horwich

Accomplishments. As of this writing (April 11, 2020), there is some uncertainty over how our book bag distribution scheduled for June in the 4 schools we serve will be accomplished, in light of school closures. However, the schools have been provided funding, many of the materials have been acquired, and we are working with the teachers to assure the book bags are distributed to the 500 students we project to serve, since those materials are even more critical now than ever. During this year, we also developed plans for a Summer Outreach Program which we hope to launch in summer 2020, pending grant funding and the lifting of restrictions on social contact.

Goals. Our goals for 2020-2021 include continuing service to our 4 partner schools, expanding our Summer Outreach Program to both serve more students throughout the summer and to provide many more opportunities for UUFCO volunteers to work with students. A continuing goal is to work to expand the foundations and businesses that provide consistent funding to support the program, leveraging the wonderful support we receive from UUFCO and its members and friends.

Challenges. Our biggest current challenge is navigating the social interaction restrictions and school closures that prevent our normal bookbag distributions, and which may limit our plans for the Summer Outreach Program. Beyond that, we believe our program is on solid footing with outstanding school partners.

Greater Community Collection (GCC)

Contact: Ken Wilhelm

Participants: Ken Wilhelm, Lew McFarland, Carol Ann Carey, Ron Clarke, Annis Henson

Purpose: to vet and select nonprofit organizations and programs that align with the seven UUFCO principles as beneficiaries of monthly greater community collection funds.

Accomplishments: Recipients March 2019 to February 2020: GCC raised \$18,305 for 10 different organizations over the last 12 month period.

2019	Recipient	\$ Results
March	Family Resource Center	1,293
April	Garden For Every School – C.O. Environmental Ctr.	913
May	Shepherd’s House	1,263
June	Beulah’s Place	1,227
July		NA
August		NA
September	FANS of the Deschutes Canyon Area	\$1,315
October	Team Rubicon	\$1,622
November	Council on Aging – Caregiver Support Program	\$1,662
December	Bethlehem Inn – Shelter Operating Expenses	\$4,772
2020	Recipient	\$ Results
January	MDA- Moms Demand Action	\$1,786
February	R.E.A.C.H.	\$2,452
March	Ministers Discretionary Fund	\$12,570
TOTAL		\$30,875

Future Goals:

- Increase communication regarding the impact of GCC donations
- Announce beneficiary selections and descriptions in a more timely manner

Challenge: Choosing between so many worthy causes

Immigrant Solidarity Network

Contact: Sue Clarke

Working with the Latino Community Association remains a UUFCA ISN commitment. Several members continue to volunteer, helping with computer maintenance, tutoring, and general office work. This has become a helpful partnership keeping both parties informed about the work of the other.

The biggest undertaking of the UUFCA ISN cohort was the December 2019 Latino Community Association fund-raising luncheon. The cohort has staffed this event with over 30 volunteers for the last three years. This year, with UUFCA ISN cohort's dedicated work, LCA raised almost \$50,000 for their immigrant support work in the communities they serve.

One ISN cohort member served for two weeks in El Salvador and also accompanied a Latino woman facing deportation to her ICE hearings in Medford. The fellowship and cohort members helped financially with the member's expenses.

The ISN cohort also offered use and prepared rooms at the Fellowship for two immigrant groups this year:

- 1) LCA's volunteer coordinator presented a program on volunteer opportunities to the Bend community.
- 2) The Interfaith Movement for Immigrant Justice state-wide group spoke about short and long term goals to the larger ISN group.

REACH

Contacts: Barbara Belzer, Ginny McKee

REACH is a new non-profit organization that was incorporated specifically to provide mobile outreach to the homeless community and is funded through a partnership of churches in the Bend area. Members of the Homeless Outreach Project at UUFCA worked with the Church and were able to procure funding to partially support REACH through the direct Social Justice Committee line in the budget in the coming year, as well as the Greater Community Collection held in Feb. 2020. Some additional fundraising may still be required.

The Homeless Outreach Project at UUFCA has brought visibility to the problem by initiating meetings and/or communications with a group of more than 40 interested members of the congregation. Integral to this visibility has been the involvement of Stacey Witte, Executive Director of REACH, who has educated us on the needs of the homeless community in Bend.

Related activities of the UUFCA group have included volunteering at Open Door which provides low-barrier support to homeless people, representation on the Interfaith Partnership for Justice which was a catalyst for the creation of REACH, and initiating educational opportunities to inform the UUFCA congregation about homelessness and how they can help.

The team at UUFCCO is relatively new and is still learning how best to actively engage the congregation in its efforts on homelessness, how to fund activities that directly support the homeless community, and how to engage with the broader church community through the Interfaith Partnership for Justice. The group is excited about the opportunity to meet and become more actively involved over the next year.

Wildcat Wizards Tutoring

Contact: Christine Walsh

This program, finishing its 5th year, served an average of 22-23 student/tutor pairs throughout the school year up until schools closed due to the pandemic. For the coming school and church year, the group identified a new team to take over the volunteer coordinator roles and started the transition.

A success outside the main goals saw two tutors recruited from the community who started attending UUFCCO.

Goals and challenges for the upcoming year will include making the transition to new leadership and designing flexibility in to program delivery to adapt to the pandemic.

STEWARDSHIP COMMITTEE ANNUAL REPORT 2019-20

Submitted by Linda Johnson and Daelene Schwartz, Co-Chairs

Members: Linda Johnson and Daelene Schwartz, Co-Chairs; Mark Steinberg, Sylvia McFarland, Jeffrey Belzer, Trisha Bell, Susan Kinney, Rev. Scott Rudolph

Purpose: The mission of the Stewardship Committee is to educate the congregation about the meaning and importance of Stewardship and to conduct the Annual February Pledge Campaign.

Accomplishments

- Beginning in April, the Stewardship Committee expanded its membership to allow for greater coordination between the Finance Committee, Board, and New Member Exploration classes which communicate messages related to UUFCCO finances and stewardship. The core Stewardship Committee includes the Co-Chairs, and intern, the UUFCCO Treasurer, and incoming Board Chair-elect. The expanded Committee that was convened for major decisions included the current Board Chair, Rev. Scott Rudolph, and Trisha Bell of the New Membership Exploration Committee.
- The Committee reviewed carefully the results of the survey done at the conclusion of the prior year's pledge drive. Additionally, the Stewardship Chair Linda Johnson held a number of relationship interviews with UUFCCO formal and informal leaders to gather historical information and feedback about what they felt was needed to improve the work of the Committee.

- After reviewing all of the available data, the Committee gave a presentation to about 40 UUFCO leaders to share the data, identified concerns, and to listen to feedback about how the data was interpreted by others. From this presentation, a number of goals for the Committee were established.
- Over the summer, the expanded Committee developed a 12 month communication plan to meet the community's request for fiscal transparency, and to create a more comfortable culture about stewardship discussions. This plan was implemented in September, with key messages delivered in a variety of ways by the Board, Finance Committee, New Member Exploration Group, and the Stewardship Committee.
- During execution of the Campaign activities and preparation, the Committee discussed how to conduct the campaign while reducing expenses. Out of this discussion, a new Stewardship brochure was designed that was not dependent on the campaign and would serve for multiple years and audiences. The new brochure has received positive feedback. The expenditures for the campaign came in under budget, and \$1500 less than the prior year.
- The 2020-2021 Annual Pledge Campaign raised the highest amount of Annual Pledge funds in the organization's history. As of 3-09-2020, UUFCO received 205 pledges totaling \$423,324,76, exceeding the goal by 6%. Pledges were received by 72% of the membership, and follow-up efforts are expected to increase the response rate.
- A celebration party was held at the conclusion of the campaign for the general UUFCO Community, and many members expressed their appreciation for the Committee's work.
- The commitment to ongoing, engaged leadership played a large part of our work this year. As a result, the new co-chair of Stewardship, and a new intern, we added to the team in March 2020.

Future Goals

- To exceed the financial target given to the Committee for the 20/21 Annual Stewardship campaign through pledges received during the month of February 2021.
- To continue to build on and deliver a comprehensive / year round stewardship messaging communications plan.
- To continue to foster a cultural shift in how Stewardship / financial giving is perceived within the Fellowship - to more closely connect giving and generosity through financial support to what connects and is meaningful to each.
- To work more closely with the Finance Committee in shaping the budget, communication and the processes for financial goal setting and coordinated communication.
- To continue to expand the Stewardship Committee with committee members needed to achieve the long term strategy for fund-raising and for succession of key members.

SUNDAY VOLUNTEER TEAM ANNUAL REPORT 2019-20

Submitted by Judy Hurlburt, Chair

Members/Team Leads: Judy Hurlburt; Trisha Bell, Liz Dougherty, Marge Lee, Rebecca Miller

Purpose: To fill Sunday Volunteer positions in order to make our Sunday services welcoming and efficient.

Accomplishments

- We worked with the Growing Together Task Force to assure the one service format in the summer of 2019 worked well. And again, worked with the Task Force to assure the two services worked well again with volunteers.
- We contacted new members and encouraged them to volunteer and how. Team leads offered to mentor new members in the positions.
- Reviewed issues as two services came onboard again in Fall 2019.
- Worked with Safety and Security Committee to devise an efficient working plan for Door Monitors.
- In January, 2020, Judy Hurlburt stepped down as Poobah or Volunteer Coordinator, and Rebecca Miller transitioned into Greeter Team Lead previously held by Trisha Bell's.
- Revised Sunday Volunteer position instructions again after asking volunteers for feedback.

Future Goals

- Offer additional position trainings to continue building depth of volunteers at each position.
- Continue to reach personally to each new member who joined since last September and encourage them to volunteer at a position in which they are comfortable.
- Recruit at least one new team lead for the Usher position.

Challenges

- Getting people to volunteer on a regular basis and use Signup as a mechanism for letting team leads know positions are filled each Sunday.
- Building depth in teams with people who will volunteer on a routine basis, if even on a bi-monthly or monthly basis.

WOMEN'S CONNECTIONS ANNUAL REPORT 2019-20

Submitted by Carolyn Tate on behalf of Women's Connections Steering Team

Steering Team: Mari Brennan, Donna Dobkin, Diane Pietrzak, Carolyn Tate, Nancy Tyler

Purpose: Nurturing connections among UU women

Accomplishments

- Since April 2019, Women's Connections has held eleven Monthly Meetings, with a variety of topics and experiences. We have also held a Special Activity workshop on "A Matter of Money", led by Leslie Koc.
- Attendance at the Monthly Meetings increased to a high of 48 in February 2020 (the Peaceful Presence Death Doulas).
- Women's Connections also helped coordinate the Annual Women's Retreat in October 2019 and has taken over the facilitation of the Retreat for 2020.

Future Goals

- Women's Connections hopes to continue to offer a diverse slate of activities, including two writing workshops, two musical gatherings, and several discussions.

Challenges

- Obviously the changing reality of physical distancing impacts our ability to offer programs. Attendance at our first Zoom meeting was problematic. Despite email reminders, people's sense of time is amorphous.
- Also, we had hoped that most ideas would come from the women in the congregation. Instead, we are having to come up with most programs, which will be challenging.

WORSHIP TEAM ANNUAL REPORT 2019-20

Submitted by Marean Jordan

Members: Shonna Edwards, Noreen Halberstadt, Mark Hickman (Music Director), Kristel McCubbin-Masterson, Ellen Mercer, James Simmons-Cox, Chandra Smith, Marean Jordan (Chair), Rev. Scott Rudolph

Purpose: The Worship Team collaborates with the Minister and the Music Director to offer direction and planning support for the structure, content, and quality of Sunday morning worship services and the future direction of the worship program.

Accomplishments

- This year the Worship Team scheduled and coordinated Sunday services with a variety of

lay speakers and guest ministers. We also participated in planning and problem-solving for online services beginning in March of 2020.

The diverse worship and varied musical experiences offered through Sunday services support the spiritual growth of our UUFCO community and offer a warm welcome to many newcomers and friends.

- Throughout the year the Worship Team has engaged in an ongoing process of learning and reflection, with the goal of adapting congregational worship experiences to changing needs of the congregation. We facilitated two congregational conversations and an online survey to learn from the congregation about the impact of worship and new ideas for future worship experiences. The team drew on these ideas in two visioning and planning retreats and further discussions with Rev. Scott, resulting in changes in the design and structure of services to create more intimacy and connection. Further adaptations were made as we transitioned to online services in mid-March.

We continue to aim for worship services that are welcoming, relevant and meaningful for our diverse, all-ages community and that offer varied opportunities for individual spiritual growth.

- We added two new members to our Worship Team this year—Shonna Edwards and Ellen Mercer—who have brought new perspectives and ideas to the team.

Future Goals

- Continue to refine and adapt the structure and content of Sunday services to address the evolving needs of the congregation for active participation, inclusion, connection and spiritual growth
- Support the transition from online to face-to-face services
- Reach out to the larger community for diverse speakers who address our social justice and environmental concerns and represent different religious traditions and spiritual paths

Challenges

- Inviting more active participation of children and youth in our services
- Rethinking the role of Worship Associates
- Addressing the difference in attendance and participation in the first and second service

THE BOARD OF TRUSTEES NOMINATIONS FY2020-21

The UUFCO Leadership Development Committee is pleased to announce the nominees for open board positions for our new Fellowship year beginning on July 1, 2020. These nominees bring a wide range of experience and a deep commitment to UUFCO. We feel very fortunate that they are willing to serve on the Board of Trustees.

Daelene Schwartz is our nominee for Vice President. This is a three-year commitment. Daelene will be President in FY 2021-22 and Past President in FY 2022-23.

Daelene is a native Oregonian who moved to Bend 4 years ago when she and her husband, Barry, retired. She joined UUFCO in October 2017. Since joining the congregation, Daelene has been an active member of the New Member Orientation Committee and served last year as the Co-Chair for the Stewardship Committee.

Prior to retiring, Daelene had a very successful career in various leadership / executive positions with organizations that provided health care-related services to Seniors. Early on in her work, she spent 10 years running large volunteer based programs geared to senior needs working with the American Red Cross, City of Salem and State of Oregon Department of Human Resources. This work led her into working in the Medicaid program for the State of Oregon and then moving into leading Medicare-based programs for various large Medicare Advantage Health Care plans such as HealthChoice, PacifiCare and Secure Horizons. After almost 15 years as a Director for Medicare programs, Daelene moved into the role of Vice President for Sales and Marketing for a National senior living company known at the time as Encore Senior Living. After 8 years with Encore, Daelene moved back to running Medicare Programs and worked the final 10 years of her career as the National Medicare Director for the Program Office of Kaiser Permanente. Daelene graduated University of Oregon. In 2013, she was accepted into and attended Harvard's Executive Leadership program.

Daelene loves to travel and over the past 20 years has worked through her initial "bucket list" of places to see. She was hoping to "check off" a few places on her new list this summer before the corona virus hit. Between them, Barry and Daelene have three adult children and (so far) four grandkids.

Fletcher Chamberlin is our nominee for Treasurer.

Fletcher Chamberlin is our nominee for Treasurer. Fletcher and his wife Linda Johnson joined UUFCO in February 2017, attracted both by the opportunity to continue their spiritual development as well as the welcoming community. Fletcher moved to Bend when he and Linda (who has lived in central Oregon since 1998) were married in 2007, though he kept his job in Hillsboro with its weekly commute until he retired in 2014. He and Linda each have three children from prior marriages, and now eight grandchildren.

Fletcher grew up in Massachusetts and graduated from Yale (when it was easier to get into than it is now) during the turmoil of the late sixties and early seventies. Early in his career, he was a banker for 9 years in New York and San Francisco. He moved to Portland in 1980 to be Assistant Treasurer of Tektronix, where he worked for 12 years. After several other finance and investor relations roles, he finished his paid career with 11 years as Treasurer and Investor Relations Director with FEI Company, a \$1 billion global electron microscope manufacturer based in Hillsboro.

He has served on the boards of the Catlin Gabel School (Treasurer and Board chair), Saturday Academy (Board chair), the Portland Community College Foundation, and Planned Parenthood Columbia Willamette (Finance Committee chair). He is a member of the Rotary Club of Bend-Mt. Bachelor. He enjoys golf, skiing and pickleball and keeps promising to get out his old road bike to get back to something he enjoyed for years.

Ella Chatterjee is our nominee for Secretary.

Ella moved to Bend in 2014 with her family, Romir, Leah and Ravi, after many years in the urban center of Washington, DC. Ella was raised as a Southern Baptist and did not participate in any organized religion after leaving the Southern Baptist church in her twenties. Before finding UUFCO, her spiritual practice had centered on Tai Chi and the study of philosophy.

After earning an MA in philosophy at the New School for Social Research in New York City, Ella completed a law degree from Temple University and spent 32 years as a labor attorney, working for the National Labor Relations Board in Washington, DC. She advised Board members on appeals from unfair labor practice trials across the country and wrote decisions on these cases for the Board.

Since becoming a member of UUFCO, Ella has served on the Fireflies and Membership Committees, volunteers in the office and participates as a mentor in RE's Coming of Age program. In her free time, she enjoys hiking, reading, and practicing Tai Chi.

UUFCO members will have an opportunity to vote for the nominees at the May 17, 2020 annual meeting. In accordance with the UUFCO bylaws, nominations will be allowed from the floor at the Annual Meeting.

The continuing Board members for FY2020-21 are:

Mark Steinberg, President
Susan Kinney, Immediate Past President
Chad Leonard, At-Large
John Lawton, At-Large

FY 2020 - 21 Budget Report

Submitted by Sylvia McFarland, Treasurer

The Board of Trustees and the Finance Committee have recommended the attached budget for approval by the membership.

The Finance Committee spent a considerable amount of time discussing how to handle these uncertain financial times. We concluded that our estimate of income should be somewhat conservative. Pledge income shown is roughly 5% to 8% lower than it would be based on pledges in hand and expected additional pledges. Rent income is 27% lower than our Event Manager's enthusiastic estimate, which was made assuming normal economic conditions.

Due to our desire to work towards funding Social Justice from the budget, based on input from the Social Justice Funding Task Force, we have budgeted \$4,500 from three Greater Community Collection Sundays that will help defray the increased spending for our community social justice projects of Fireflies and REACH (the interfaith homeless program.)

On the expense side, we increased wages by 3%, and increased our Building Superintendent's hours so that he can spend more time on preventative maintenance. We increased spending on Social Justice above the amount budgeted from GCC collections, and allocated money for additional preventative maintenance on our HVAC units, and for a payroll service.

In light of the uncertain economic outlook and other priorities for funds, we chose to defer contribution to our capital reserve. That has the effect of keeping more funds in our operating reserve. This decision was also made in the context of our existing building reserve from the construction of the building.

The Finance Committee plans to track income in the first three to six months of the fiscal year, and, if it is warranted by positive experience, we will recommend adjustments to the board with priority to increase our staff's wages, increase our contribution to Social Justice and/or contribute money to our Capital Replacement Reserve. It is also possible that income could fall short of even our conservative estimate. If so, cutting expenses and/or a supplemental request for additional pledges would be required, and that would be more challenging. If the situation becomes dire, we do have reserves that we can take advantage of.

2020-21 Draft Budget (follows)
Compared to 2019-20 Budget and 2019-20 Estimated Actual

Unitarian Universalist Fellowship of Central Oregon			
4/9/20	Board 4/19	February	Board 4/20
Account Name	Approved Budget FY19/20	Annualized YTD FY19/20	Approved Budget FY20/21
Income			
Cash Collection	17,000	17,987	18,000
Misc. Contributions	11,000	9,887	10,000
Adult Spiritual Devt. income	5,000	5,966	4,500
Memorial Donations	0	150	0
Coffee Donations	0	450	450
Recycle, Coupons, etc	500	606	600
Current Year Pledge Receipts	383,000	400,000	423,000
Prior Year Pledge Rec	0		0
Interest MM Cash Res	1,100	1,452	1,200
Art Committee Income	1,500	1,060	1,100
Community Event Income	0	0	0
Auction Income	10,000	1,211	15,000
CLF Special Events	0	1,725	1,500
GCC Income for UUFCO SJ			4,500
Rent Income	55,000	28,500	80,000
Staffing - Events	21,800	12,000	30,000
subtotal: historically unbudgeted income	7,600	10,803	8,750
Endowment Income	0		
Total Op Income	505,900	480,995	589,850
Expenses			
Subtotal All Staff Exps	403,515	386,554	446,836
Sunday Program Expenses			
Speaker Expense	2,500	2,242	2,500
ASL Expense	1,500	672	1,500
Program-Coffee	2,600	1,713	2,600
Worship Svc Supplies	550	657	700
Music Spls, Workshops	1,200	1,161	1,200
RE Spls, Workshops	3,000	2,997	3,300
Subtotal Sunday Exps	11,350	9,442	11,800
Dues			
Dues-PNWD	0		0
Dues-UUA	18,279	19,097	20,107
Dues-State of Oregon	100	50	100
Video Services, Licensing	265	294	700
Real Estate Taxes	0	0	0
Subtotal Dues	18,644	19,442	20,907

Facility/Office Expense			
Office Exps-Supplies	1,600	1,033	1,600
Office Exps - Copies	3,000	2,098	3,000
Office Tech Support	2,000	3,582	1,500
Bank Svc Charges	1,800	3,967	3,000
Postage	500	131	250
Telephone	3,150	969	0
Internet/Phone	1,800	1,134	2,850
Equipment Purchases	2,500	0	2,500
Event Rental Expenses	400	695	4,000
Insurance Expense	14,850	14,694	14,490
Accounting/Church Windows Support	450	184	1,275
Congregational Directory	600	597	600
Legal & Professional Fees	500	0	1,500
Payroll service			1,500
Subtotal Facility/Office	33,150	29,083	38,065
Operations & Maintenance			
Utilities	30,500	27,539	28,325
Security Service	1,900	2,014	1,900
Maintenance & Repairs	13,300	15,907	13,800
Janitorial Service	0		0
Asphalt Maintenance	0		0
Window Cleaning	1,300	1,250	0
Landscape/Snow Removal	3,500	2,035	5,000
Custodial Supplies	2,800	1,532	2,300
Maintenance Contracts	4,400	2,719	9,000
Safety & Security	1,000	1,210	1,000
Capital Replacement	0		0
Subtotal Oprtns & Mntnce	58,700	54,206	61,325
Advertising/Outreach			
Advtnng-BendBulletin	2,200	1,896	1,500
Advtnng - Other	0	371	2,600
Outreach/Public Rlns	2,300	238	300
Newsletter	635	152	350
Website Expenses	1,000	373	500
Subtotal Adv/Outreach	6,135	3,030	5,250

Board/Committee Expense			
Board Expenses	500	534	700
PNWD/UUA Meetings	0		0
Adult Spiritual Devt. Expense	4,500	4,978	3,400
Caring Committee	0		0
CLF Special Events	300	372	1,000
Healthy Congregation/Shared Ministr	350		0
Leadership Devlpmt Comm	300	123	300
Kitchen Equip & Spls	1,050	295	750
Membership Team	1,150	357	1,143
UUFCA Annual Picnic	0		0
Newcomer Packets	0		0
Social Justice Comm	1,110	476	8,000
Stewardship	1,665	1,871	1,880
Worship (Program) Com	300		0
Art Committee	1,460	849	1,460
Library Committee	300	51	250
Consulting	0		0
Auction Expenses	600	20	1,500
Aesthetics Committee	500	360	700
Installation of New Minister	0		0
Memorial Services	180		500
Congregation Meals	500		500
Subtotal Board/Commtees	14,765	10,286	22,083
Total Operating Expense	546,259	512,042	606,265
Spending from Reserve Fund	40,359	31,047	16,415

Budget FAQs

Income Questions

Our estimated actual income for 2019-20 is lower than budgeted. Why is that?

The primary reason is COVID-19 and the necessity to close the building for the last 3.5 months of the fiscal year. Between events and the preschool, Jonathan and Leora estimate we have lost approximately \$38,000 in income. I am hoping that pledge income will come in very close to budget. Total pledges exceed that amount, but we always have pledgers who are unable to fulfill their pledge.

What is the difference between our expected total income in 2019-20 and our budgeted income for 2020-21?

We are estimating a \$109,000 increase in income in 2020-21. This includes a \$23,000 increase in pledges, a \$14,000 increase in Auction income, \$4,500 from three General Community Collections, \$51,000 for Events, and \$18,000 for Event Staffing.

What is our average pledge per pledge unit?

As of April 8, 2020, our average pledge per unit for FY 2019-20 is \$1,745, as compared to \$1,992 for FY 2020-21. The FY 2019-20 average includes partial year pledges by our new members, which pulls that average down. As we proceed through FY 2020-21, and new members pledge for the remainder of the year, the average for FY 2020-21 will also drop somewhat.

Expenses – Staffing

There is 10.7% increase in Compensation over anticipated expenditure for FY 2019-20 and a 10.7% increase over 2019-20 budget. What is included in those numbers?

We gave our staff a 3% wage increase. In addition, we increased Parker's hours to allow him to spend more time on preventative maintenance. We estimated that health insurance costs would increase at 5%. Lastly, both the income for event staffing and the expense for event staffing is overstated for what we budgeted for event income. Our Event Manager estimated Event income and Event Staffing income and expenses, based on normal economic conditions. The Finance Committee and the Board reduced the Event Income, but did not adjust the Staffing numbers. Thus, we anticipate that both the income and expenses for Event Staffing will be lower than projected, but should generally offset each other.

We have also budgeted additional funds for hiring a payroll service and possibly changing accounting software.

Expenses – Bank Charges

Why is there a large increase in bank charges?

Increasing numbers of our members are paying their pledge online with a credit card or through transfers from their checking account. The cost to UUFCA for people who pay with their credit card is 2.9% plus \$0.35 per transaction, while the cost to us for people who pay via ACH bank transfer is 1% plus \$0.30 per transaction. We are happy to accept your contributions however you want to pay them. If you want your dollars to go further, please have the money transferred from your checking account, as opposed to your credit card, and if you can reduce the frequency, that will save us on transaction fees.

Expenses – Phone/Internet

Why did phone expense go away?

Previously, we bought our phone service from Century Link and our internet from Bendbroadband. Thanks to Mark Hickman, he discovered that it would be cheaper to combine both services through Bendbroadband, and our quality of service improved.

In addition, we have budgeted \$450 for Zoom service through next fiscal year. This allows us to hold two meetings at the same time, and also have the large audience that we get for Sunday services.

Expenses – Operations and Maintenance

Why is no money budgeted for Window cleaning?

With Parker's increased hours, he will be able to take over that responsibility.

Why are Snow Removal and Custodial Supplies up from this year?

We had a fairly light year for snow this year, and with the preschool using the facility daily, we will need to be more diligent about snow removal. Similarly, use of the building by the preschool will result in a small increase in the need for paper supplies for the restrooms.

Why is there such a large increase in Maintenance Contracts?

There are two reasons. We have not been happy with the competency of the company handling our HVAC maintenance. The new company has increased the scope of work, and therefore the cost of this service. They will be servicing the units twice per year, and Parker will be servicing them twice per year, so they will be maintained and checked four times per year. It is our hope that this will decrease our maintenance costs.

Why didn't we budget anything for Capital Reserves?

The Finance Committee and the Board felt that since we are budgeting a shortfall, we should wait until we had a balanced budget to include a reserve for Capital Replacement. We do have some money put away, from past years' budgets, and will likely have to rely on those funds in the next few years for replacement of short-lived items like some of our high tech equipment, and painting of the exterior of the building.

Expenses – Advertising and Outreach

What is the addition of Advertising – Other expense?

We will be cutting back somewhat on our advertising in the Bulletin, and increasing our presence in Social Media.

Expenses – Board and Committee expenses

How were Committee expenses determined?

Each committee that has expenses, submitted a budget to the Finance Committee, and those requests were generally deemed reasonable and approved as submitted.

The exception to this is the Social Justice budget. The board wants to work toward funding Social Justice from the budget as opposed to fundraisers. To help bridge that shift, we decided to dedicate the proceeds of three of the Greater Community Collections to our budget, to facilitate increased budget expenditures on Fireflies and REACH, the new Interfaith Homeless Outreach and Casework working group. The \$8,000 budgeted for Social Justice is almost \$4,000 less than they requested, but shows our intention to continue to work toward increasing our budgetary support of our Congregation's Social Justice activities.

Expenses versus Income

What is spending from the reserve fund?

When our building was being designed, the leaders recognized that it could take time for growth of membership and pledge income to keep up with the increased cost of running our own building, versus spending \$1,800 per month to rent the Old Stone Church. At the time, \$225,000 was set aside, with the hope that we would have about five years to make the transition.