

**Coordinating Team
Report to the Board of Trustees
August 2021**

In addition to the financial and membership reports, the Coordinating Team (CT) brings the following items to the Board for your attention and awareness:

Board Monitoring Report for August: Stewardship Summary for 2020-2021

Stewardship Report for 2020-2021

The Stewardship Team for 2020-2021 was comprised of John Burns (co-chair), Cyndi Martinec (co-chair), Erica Blake, Elaine Camp, Chris Clark, Franklin McClelland, Shawn Morton and Gwynne Movius, with Kelly Greene, John Herrick and Alesia Hutto serving as staff liaisons. The canvassers included Lincoln Baxter, John Burns, Susan Cox, Rich Greene, Ellen Holliday, Colin Hood, Cyndi Martinec, Franklin McClelland, Shawn Morton, Gwynne Movius, Neal Sigmon and Paul Wilson.

Faced with the pandemic and an uncertain economy, the Stewardship Team continued to encourage generosity at the 5% level across the board and oversaw peer-to-peer canvassing efforts—contacting individual members about their pledges, all done virtually (please note: we’re greatly indebted to our canvassers for their tireless efforts in 2020-2021). New initiatives by the team included acknowledging pledges through handwritten thank you notes, the mailing of handcrafts by our CYRE children and youth and the creation of virtual UUC Member Appreciation Nights and a UUC FUUN Festival on our grounds, the latter events done in conjunction with the Community Building Team. This past year we assigned monthly captains, who acted as “cheerleaders” by offering testimony and encouraging financial commitment and generosity. Stewardship Team members also continued to record monthly stewardship messages for Sunday services and included regular notices in *Currents*.

Despite our best efforts, this year’s campaign proved difficult due to the pandemic. Monthly pledge response rates ranged from 45% to 78%, but with an average response rate of 67%. While we had several members increase their pledges, those increases were offset by reductions from some of our more generous pledgers. New Member Pledges were also below budget given our

move to virtual-only services. As previously anticipated, we ended the year with a 3% loss. See summary below:

Months	PU in Group	Canvased	Resp?	% Resp	Current Monthly	Current Annual	New Monthly	New Annual	Change Monthly	Change Annual	%
September	47	12	30	64%	\$12,376	\$148,517	\$12,324	\$147,889	-\$52	-\$628	0%
October	46	9	30	65%	\$7,879	\$94,545	\$7,712	\$92,538	-\$167	-\$2,007	-2%
November	43	12	28	65%	\$5,954	\$71,451	\$5,563	\$66,753	-\$392	-\$4,698	-7%
December	45	5	29	64%	\$6,079	\$72,950	\$4,934	\$59,211	-\$1,145	-\$13,739	-18%
January	45	13	32	71%	\$6,415	\$76,981	\$6,324	\$75,892	-\$91	-\$1089	-1%
February	46	13	36	78%	\$9,399	\$112,786	\$8,940	\$107,278	-\$459	-\$5,508	-5%
March	40	8	18	45%	\$5,035	\$60,425	\$4,971	\$59,528	-\$65	-\$777	-1%
April	38	8	28	74%	\$5,182	\$62,185	\$5,222	\$62,667	\$40	\$482	1%
May	29	5	23	79%	\$5,345	\$64,136	\$5,379	\$64,548	\$34	\$412	1%
June	43	5	28	65%	\$8,433	\$101,196	\$7,975	\$95,704	-\$458	-\$5,492	-5%
Existing Members	422	90	282	67%	\$72,098	\$865,172	\$69,344	\$832,128	-\$2,754	-\$33,044	-3%

In summary:

- We netted a 3% loss for 2020-2021 and in 2019-2020 it was 0%.
- We had an average response rate of 67%, which is much higher than last year's response rate of 50%.
- As of June 30 we had a total of \$832K in pledges (not including new members.) This prediction was spot on for budgeting purposes.
- We canvassed 53 units in 2019-2020 vs. 90 units in 2020-2021.
- We had 45 less pledge units in 2020-2021 vs. 2019-2020, so we are continuing to lose pledge units, but we continue to increase our average pledge per unit.

As the team considers a strategy for the 2021-2022 congregational year, we have analyzed the past eight years of our stewardship campaigns to find where the opportunities are in moving the needle forward in pledging. We are also looking at our return to in-person services and programming and at how different generations respond to philanthropy and stewardship.

Movement Back to In-Person Activities

This summer we have begun holding Summer Sing on Sundays at 11 a.m., CYRE gatherings on the playgrounds and smaller group adult gatherings back in our facility at 234. To date, all indoor activities have been held in Freeman Hall, a sizeable space allowing for distancing and benefitting from updated filtration in our air handlers. Thus far, participation from our members in our numerous opportunities has been modest.

Earlier this summer we announced a hope to return to in-person services on Sunday, September 12, the Sunday after Labor Day. The subsequent surge in pandemic cases and deaths along with the new challenges posed by the variant strains have caused us to question the advisability of reopening our facility now.

After a lengthy discussion amongst the professional staff, consideration of input from members of the Transition Task Group and then Jay's participation in a Zoom discussion amongst the senior ministers of our largest UU congregations, we decided to circulate a survey amongst our members to assess the perspective of the community.

The survey was posted in *Currents* on Thursday, August 12 and will be repeated there again on Thursday, August 19. Members received it in an email on Friday, August 13 and it is being posted to our member Facebook page as well. Responses from our members will help determine the comfort level with reopening next month and with various scenarios we might use to try to assure both safety and vitality.

Update on Memorial Endowment Trust Grant Projects

The Memorial Endowment Trust (MET) of the UUC provides an opportunity for members to contribute financially to the life and well-being of the congregation through legacy gifts, memorial contributions, and other means of celebrating or honoring lives within our community. Members are invited in regular appeals to consider including the MET in their legacy giving. The MET Board is happy to report that total net assets in the Trust exceed one million dollars!

Years of careful cultivation and management by MET trustees have resulted in a balance sufficient to generate significant income. Each year the trustees determine the portion of that income available to support and enhance the work of the congregation through grant funding. The Memorial Endowment Trust awards grants for worthy projects that might not fit cleanly into our operating budget, but which support our Community's Vision and Mission.

This year, the MET board announced that they awarded \$39,000 to six different Grant proposals that have come from the Community, which include:

1. Outdoor Gathering Area with a Fire Pit located near the Memorial Garden and CYRE Classrooms. STATUS: installation nearing completion
2. Updating Interior Signs and Banners. STATUS: project underway
3. Technology Upgrades to Create Hybrid Meeting/Learning Opportunities. STATUS: project underway
4. Updating the Aesthetics of the Worship Experience. STATUS: no progress to date
5. Upgrades to allow for Internet/Wi-Fi access Throughout the Building. STATUS: project completed
6. Marketing Grant. STATUS: preparatory work underway

The generous contributions of our members to the Memorial Endowment Trust of the UUCU make their grant program possible.

Religious Education Contract Staffing

Eve and Jay updated the Board in June on our failed search for an Interim Lifespan Religious Educator. Since that time, we have had the immense good fortune to contract with four very capable and experienced members of the community to help lead our religious education programming for this year. Melissa Schropp and Lisa Walls are now leading our children's education efforts, Michael Amy Cira is leading our efforts with our middle and high school age youth, and Sharon Baker is leading our Adult Religious Education/Spiritual Development programming. All have signed one-year contracts that are paying a monthly stipend and, as such, are not considered members of the professional staff.

Eve has been meeting regularly with the CYRE contract staff and Jay has been in regular communication regarding ARESD offerings. Both will be meeting monthly with all four in an effort to coordinate our approach to religious education in ways that may offer opportunities for intergenerational experiences.

Session on Sunday, August 22

Our final major task in the Focus 2020 effort launched two years ago now entails investing in a marketing campaign. In anticipation of that campaign, the professional staff was asked to offer direction in identifying our target audience. The staff spent an intense, all-day session in discussion around this important topic.

The staff concluded that the session could be of real benefit both to the Board and to members of the Focus 2020 Task Group. So, Jay will be leading this offering on Sunday, August 22 from 1 – 4 pm.

This deep dive into the identity of our congregation may prove valuable in helping to identify a starting place for the Board's anticipated effort to offer visionary direction on the next steps in our efforts to embody our Vision and Mission. It will invite participants to reflect deeply on who we are and what we offer. We hope Board members will participate in this upcoming session.

UUCC CARES Fund

Cares Fund Balance: \$28,422.21

Ongoing Activity

We continue to strive to be a vital and engaged virtual congregation despite the many challenges that presents for all of us.

•Sunday Services Our summer series—“Roots Hold Me Close”—is featuring reflections from our members on what grounds them, what roots them, what makes them who they are. In services coordinated by our ministers and supported by Director of Music, John Herrick, we are being offered opportunities to get to know those presenting in a much deeper way. There have been many poignant reflections offered supplemented by selections from the archive of music created over the course of our virtual services. Not surprisingly and consistent with prior years, “participation” in these services is down from earlier in the calendar year. We continue to hear messages of appreciation for these efforts.

•Adult Programming We have offered a robust array of opportunities for adults to gather in-person in the past few weeks, most as a part of the ARESD Team’s “Rooted in . . .” series. These have been promoted each week in *Currents* and on the member Facebook page. Participation has been scant and some offerings have been cancelled due to lack of interest. Those who have participated, however, have really appreciated the opportunity and offerings.

•Children, Youth, and Families Our summer theme, “Roots Hold Me Close” has provided plenty of fodder for engaging weekly lessons. Among other things, our children have explored staying grounded during “big feelings” as trees stay rooted during storms and exploring the role we each play in community while learning more about how trees support and communicate with one another through their root systems.

We’ve combined children age 3 through fifth grade for our summer classes, gathering on the Tire Swing Playground each week. It’s been wonderful to see older children helping the younger children with the arts and crafts portions of lessons. Summer attendance is always lower than in other parts of the year. Each week we have around 10 children total in class. Middle and High School youth have gathered for social interaction once a month.

The first Sunday of July and August were dedicated to family activities, an opportunity for families to participate in a lesson and social time exploring our summer theme together. Surprisingly, turnout has been highest on holiday weekends like Memorial Day weekend and July 4th weekend.

This month Eve and our CYRE Coordinators will host the CYRE Teacher Orientation, giving teachers a chance to get to know one another, and reviewing the curriculum we'll use in the year ahead, safety policies and procedures, positive discipline techniques and classroom management and developmental stages for each age group. We will thank our volunteers for their commitment during a year of uncertainty, twists and turns and give what guidance we can related to Covid. We continue to debate whether classes for unvaccinated children will be held indoors or outdoors, keeping in mind the safety of our children, families and older volunteers working with our children while also referencing decisions made by Charlotte Mecklenburg Schools.

The week following orientation, the CYRE Team will gather with Eve and our Coordinators for their annual Advance, a time to plan and prepare for the year ahead.

•Community Building This summer, we've offered a diverse array of in-person social opportunities on our grounds and in Freeman Hall. Members have hosted a board game night in Freeman Hall and a drum circle in McAlpine Park. Four of our members got together to create an opportunity to learn and play card games like Spoon, Euchre and Bridge in Freeman Hall and had a strong and age-diverse turnout. Others hosted a mystery game, inviting participants to arrive in costume and work together to solve puzzles. Later this month, one of our members will host a tour of some of Charlotte's oldest and most storied trees. Attendance has varied with one event having four people and one needing to be cancelled after no one signed up while others have had a strong turnout.

Our Director of Music, John Herrick has pulled in a rotation of musical talent from within our congregation to lead Summer Sing each Sunday morning. Turnout has varied, but this event continues to have worthwhile attendance and playful atmosphere. Social opportunities immediately after Summer Sing have worked well and members and guests have stayed to play "Write and Draw Telephone",

“Sparkling Conversations”, and “Guess Who” all interactive games that have helped people connect with familiar and new faces.

Virtual Coffee Hour has continued at 9 a.m. on Sundays with a small and consistent crowd who remain grateful for this opportunity to check in with one another.

•Congregational Care Our Congregational Care Team delivered meals and cards to members in times of crisis and celebration.

The Team welcomed four new members this month at a get-together to get to know one another and review the tasks that lie ahead for the team in the coming months. We celebrated Jane Kusterer’s long tenure on the team and the vast number of home cooked meals she has delivered to our members over the years, wishing her well as she rotates off the team.

Our ministers and other professional staff continue to reach out to our members in times of crisis, celebration, and simply to check-in.

•Building and Grounds The Building and Grounds Team for 2021-2022 is comprised of Roy Smith (chair), David Johnson, Judy Love, Dan Maples, Tom Moore, Charles Pilkey and Jinny Sullivan with Alesia Hutto serving as staff liaison.

The team continues to work on wrapping up the installation of the new exterior signs. We have experienced delays due to supply and staffing shortages, but overall the project is still moving forward. We hope to have the work completed soon. The creation and installation of our exterior signage was made possible by a grant from the Memorial Endowment Trust (MET) of the UUC. The generous contributions of our members to the MET make the funds for their grant program possible.

The Team held its first meeting of the new year on Thursday, August 5 where they reviewed the past year, reviewed outstanding projects and worked on developing a cadence for the year. The team is in discussion about developing an administrative system that archives historical information on previous projects,

developing a calendar for ongoing maintenance tasks and looking into proactive projects to help enhance our facilities. In addition to this work, the team will continue to offer support to other teams and groups leading building and grounds projects.

- Intersectional Justice Team This year's Intersectional Justice Team met for its initial meeting on August 11. Returning members Rebekah Visco, Dave Walsh and Janet Zick were joined by new members Manny Allen, Shannon Maples and Neal Sigmon. The Team revisited its purpose and committed to spend future sessions creating a framework to expand its attention to the stated purpose of the Team. The upcoming September session will be specifically devoted to revisiting our approach to Engagement Groups. We have had very nominal success to date creating an extensive array of viable ways for members to engage. We reviewed and celebrated successes, most especially the Court Watching and Reentry Housing efforts while recognizing the challenge we have had in identifying ways for members to be engaged.

The Team also reviewed a request that we commit to Room in the Inn for another season. Given our current situation, there was a recognition that we cannot make such a commitment at this time. Should we return to building use in a way that would allow for this program, the Team expressed support in continuing to participate in this program for another year.