



Unitarian Universalist
Community of Charlotte

ANNUAL REPORT 2021-2022

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IN MEMORIAM

May 28, 2021 – May 12, 2022

Here we record the names of members of our community
who have died during the past year.

We remember them with affection and here express
our grateful appreciation for their loyalty and devotion.

* * *

Richard Neff

Neal Sigmon

Kathy Spencer

Eugene Todd

* * *

In addition, several persons have died who,
although not members of our Congregation, were dear to our members.
We offer our condolences and sympathy to all those who mourn.

STAFF



The Unitarian Universalist Community of Charlotte has a professional staff of six full-time and six part-time/contract members along with many committed lay members who provide leadership for our congregation. As a self-governing community, we are both free and responsible to determine the mission, programming, and structure that best meet our own spiritual needs.

Spiritual Development and Adult Programming

Rev. Jay Leach <i>Minister</i>	(704) 366-8623 ext. 6032	jay@uuccharlotte.org
Rev. Eve Stevens (resigned 5/1/2022) <i>Minister</i>	(704) 366-8623 ext. 6040	eve@uuccharlotte.org
Sharon Baker <i>Adult Religious Education and Spiritual Development Coordinator</i>		aresd@uuccharlotte.org
Michael Amy Cira <i>Religious Education for Children and Youth Coordinator</i>		youth@uuccharlotte.org
Kelly Greene <i>Director of Member Relations</i>	(704) 366-8623 ext. 6039	kelly@uuccharlotte.org
Melissa Schropp <i>Religious Education for Children and Youth Coordinator</i>		cyre@uuccharlotte.org
Lisa Walls <i>Religious Education for Children and Youth Coordinator</i>		cyre@uuccharlotte.org

Administration

Alesia Hutto <i>Director of Administration</i>	(704) 366-8623 ext. 6030	alesia@uuccharlotte.org
Belinda Parry <i>Office Administrator</i>	(704) 366-8623 ext. 6033	belinda@uuccharlotte.org
Tom Moore <i>Sexton</i>		

Music

John Herrick <i>Director of Music</i>	(704) 366-8623 ext. 6037	john@uuccharlotte.org
Jessica Borgnis <i>Collaborative Pianist</i>		

Open Door School

Shelia Locklear <i>Director</i>	(704) 364-1521 ext. 6042	opendoorschool1966@gmail.com
Suzy Moore <i>Office Manager/Enrollment Coordinator</i>	(704) 364-1521 ext. 6041	enroll.opendoor@gmail.com

LEADERSHIP

The vitality of our community depends on the involvement of our entire religious community. Below is a list of our leadership teams and their chairpersons. To learn more about these teams and their work within the congregation for 2021-2022 please see their corresponding reports.



Spiritual Development and Adult Programming Teams

Adult Religious Education and Spiritual Development (ARESD)	Sharon Baker <i>Chair</i>	Jay Leach <i>Staff Liaison</i>
Children and Youth Religious Education	Lisa Walls <i>Chair</i>	Eve Stevens <i>Staff Liaison</i>
Community Building		Eve Stevens <i>Staff Liaison</i>
Congregational Care	Sheila Lay <i>Chair</i>	Eve Stevens <i>Staff Liaison</i>
Family Ministry		Eve Stevens <i>Staff Liaison</i>
Membership		Kelly Greene <i>Staff Liaison</i>
Small Group Ministry Steering Team (SGMST)		Eve Stevens <i>Staff Liaison</i>
Intersectional Justice		Jay Leach <i>Staff Liaison</i>
Worship		Jay Leach <i>Staff Liaison</i>

Administrative Teams

Building and Grounds	Roy Smith <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
Communications	Erin Maness <i>Chair</i>	Belinda Parry <i>Staff Liaison</i>
Finance	Mary Hackenberg <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
Memorial Endowment Trust	Mike Long <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
Stewardship	John Burns & Cindy Martinec <i>Co-Chairs</i>	Kelly Greene, John Herrick, & Alesia Hutto <i>Staff Liaisons</i>

Music

Music	Ben Schomp <i>Chair</i>	John Herrick <i>Staff Liaison</i>
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Open Door School (ODS)

ODS Managing Team	Suzanne Clements <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
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BOARD OF TRUSTEES

In consultation with the congregation, the Board reviews the objectives which guide all activities of the UUCC. The Board creates and reviews policies that determine how the work of the community will be done. They are also charged with monitoring the Coordinating Team (the Ministers and the Director of Administration) and how they conduct the work of the community.

The Board of Trustees monitors the work of the Coordinating Team through their monthly report to the Board, conversations, email, meetings, and the monthly Board meetings. These Board meetings generally take place the third Tuesday of each month at 6:30 p.m. in the Conference Room. Board Meetings are open to any member of the UUCC. Please contact the Board Chair if you plan to attend (board@uuccharlotte.org).

Your 2021-2022 Board of Trustees are:

Ann Doss Helms

Co-Chair

Paul Wilson

Co-Chair

Ben Baxter

Trustee at Large

Susan Cox

Trustee at Large

Lisa Hagen

Trustee-at-Large

Susan McClelland

Trustee-at-Large

Kurt Merkle

Trustee at Large

Samantha Visco

Clerk

Tawana Wilson-Allen

*Trustee-at-Large through
December 2021*

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Record of policy and significant action taken by the UUCC Board of Trustees
from July 2021 – May 2022

Submitted by Ann Doss Helms and Paul Wilson, Co-Chairs, Board of Trustees
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Introduction

This was a congregational year that upended the board's plans, demanding flexibility and resilience from the board, the staff and the congregation.

We went into this year thinking we would focus on creating a mechanism to put our Covenant of Right Relations into action, articulating a follow-up to our expired Call to Action and figuring out a way to monitor our progress. Instead, we were immediately greeted with Rev. Eve Stevens' decision to leave UUCC and the ministry. That was followed by Rev. Jay Leach's decision to accelerate his retirement plans. In a year when we continued to adapt to ever-changing COVID-19 conditions, the board found itself working to renew and deepen connections to each other and our community while planning a monumental transition. We are grateful for the support, suggestions and challenges offered by members.

General Organization

The 2021-2022 Board included the following members: Ann Doss Helms, Paul Wilson, Ben Baxter, Susan Cox (filling the unfilled position from the previous year), Lisa Hagen, Susan McClelland, Kurt Merkle, and Samantha Visco. Tawana Allen began the year but was forced to resign because of ongoing severe health issues. We treasure the many contributions she made during her time on the Board, both this year and throughout her term of office. The Coordinating Team of Jay Leach, Minister, Eve Stevens, Minister, and Alesia Hutto, Director of Administration, attended each Board meeting. The Board meets on the third Tuesday of each month. Meetings in executive session are called as needed, and sub-groups for specific tasks meet at various times. Below are highlights from regularly scheduled Board meetings of the 2021-2022 fiscal year.

Each meeting of the UUCC Board of Trustees begins with opening words and readings of the leadership covenant and the UUCC mission and vision statements. Board members also briefly "check-in" with each other as a way to stay better connected. Agenda items include a review of the Coordinating Team Report, which provides an update on membership, a current financial report, summary of team activities and priorities, and significant items of note related to the Community. These reports are publicly available, and discussion is primarily devoted to clarification as needed. A majority of the Board meeting is typically spent on Policy Governance Ends agenda items. This year, the central focus was on bringing the Community back together after the ravages of the pandemic and the effects of some important changes in staff personnel. Details appear in the monthly summaries that follow

August 2021

Despite some signs of improvement in the pandemic, the Board and the Staff agreed that we could not yet safely return to in-person worship services and that we would do so as quickly as was safely practicable.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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Eve announced that this would be her final year as a Unitarian Universalist minister and that she was resigning her position at the UUCC, effective at the end of this congregational year.

The UUCC's search for a Director of Lifespan Religious Education continued.

The Board continued its work on two major initiatives: 1) a general survey of the congregation in hopes of gaining clarity of focus for our work of bringing the congregation back together as the threat from the pandemic lessens; 2) a study of how best to implement our completed Covenant of Right Relations.

On Aug. 22 board members joined Jay Leach, staff and members of the Compass2020 group in a half-day exploration of who our congregation is now and who we want to be as we emerge from the pandemic.

September 2021

In response to Eve's announcement, Jay proposed a search for a one-year interim minister, to be carried out concurrently with the search for the DLRE position.

The Board made plans for a retreat on October 23 to discuss means of transitioning out of the pandemic, in order to plan and present a strong statement by the Board of our continuing vision moving forward.

October 2021

The Coordinating Team outlined plans for a hybrid service presentation, with a maximum of sixty people in the Sanctuary, combined with the streaming of the service online.

The Board had hoped to coordinate its plans for a congregational survey with similar work by the Communications Team, but that group decided to delay its work, so the Board's plan was also put on hold.

The retreat took place on October 23 and provided a good foundation for the Board's Message to the Congregation. A drafting committee (Ann, Susan McClelland, Sam, and Paul) produced an initial draft in time for the regular November meeting.

November 2021

The Coordinating Team reported that the hybrid plan for attending services would remain in place for the immediate future. Jay reported that Barry Ahrendt and others had made important improvements to the technology of the live stream.

Jay and Eve announced plans to present information on the proposed Eighth Principle, which had been individually approved by a number of congregations already, prior to a general vote on approval by the UUA General Assembly within the next two years or so.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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The Board made suggestions for changes in the draft of the Message to the Congregation and scheduled a vote at the December meeting on accepting it and then giving it to the Congregation in January.

December 2021

The Board unanimously approved the final version of the Message to the Congregation and arranged for its publication via an email blast, a Currents article, and some follow-up meetings among Board members, service teams, affinity groups, and some long-time members.

The Board formed a small group (Susan Cox, Ben Baxter, Kurt Merkle) to explore possible implementations of our Covenant of Right Relations.

January 2022

The Coordinating Team reported on the need to change the sexton position to part-time for the moment. After initial setbacks, the renewed search to fill the DLRE position was currently in a preliminary phase. The board and ministers discussed the proposed Eighth Principle, which will be up for a UUA GA vote in 2023-24.

A membership note: Tawana Wilson-Allen resigned from the Board, and we decided that, with relatively little time remaining in her term, we would not try to replace her.

The Board decided that the previous format and question on the staff survey did not serve well the purpose of the survey, especially in these pandemic times, so we decided not to administer it this year, but to re-design it and find better ways to communicate between Board and Staff.

The task force working on the implementation of the Covenant (Susan C., Ben, and Kurt) reported on their work, presenting a sample policy document on conflict resolution from another congregation.

The Board discussed nomination criteria for the Sybil Bernstein Award and made plans to choose this year's recipient at the Board meeting in March.

The Board considered what characteristics would be most desirable in choosing new members of the Board to be nominated for approval at the annual meeting, and we began the selection process for a nominating team for this year.

February 2022

Eve announced that she needed to adjust her planned departure time, moving it from July 31 to May 1. She planned to issue a statement to the Congregation on February 21, accompanied by a message from Ann and Paul to reinforce the Board's support for staff.

The Board unanimously approved a proposal to increase Kelly's work responsibilities from ¾-time to full-time, giving her new duties and a new position as Director of Member Relations.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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The Coordinating Team reported that we would return to a full resumption of in-person activities on Sunday, March 13.

The Board selected a number of people as possible members of the nominating team to put together a slate of candidates as new members.

March 2022

The Coordinating Team reported that our masking requirements would be lifted on Sunday, March 20. Tom Moore was hired as the new sexton, beginning work on March 13. The “Share the Plate” initiative was very successful since its inception, with strong contributions to Black Lives of Unitarian Universalists in its first month.

Rita Heath-Singer, Jim Lay, and Dave Walsh agreed to serve on the nominating team for new board members.

After long and difficult discussions, held over the course of a few weeks, the Board agreed to accept Jay’s resignation as Senior Minister, effective July 31 of this year. The text of the resignation proposal appears in the minutes of the March Board meeting.

The Board discussed possible recipients of the Sybil Bernstein Award for this year, with plans to make a final determination at our April meeting.

April 2022

During the “Eyes and Ears” session of this meeting, various Board members reported on congregational reaction to the news of Jay’s resignation. The overall message was one of sorrow and acceptance, along with commitment to do whatever is necessary to strengthen and sustain the Community.

Board members also reported on conversations concerning the interim-minister selection process, which began early this month with the writing of an application document supplied by the UUA Transitions Team, to be shared with ministerial candidates by the last week of the month. The Interim Search Team is comprised of Paul Wilson, Susan McClelland, John Burns, Megan Van Fleet and Melissa Vullo.

The Coordinating Team offered a proposal to make a complete final payment of the mortgage money still owed on 234 N. Sharon Amity (\$134,000). The payment would remove from the annual budget a \$44,000 payment on the loan, freeing that money for other uses, with our financial reserves to be replenished over the course of the subsequent two years or so. The proposal passed unanimously.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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The search for a Director of Lifespan Religious Education had to be postponed indefinitely at this time, with efforts underway to find members of the Congregation willing and able to take on those duties on a contract basis. That hope was fulfilled in early May when Lisa Walls and Melissa Schropp agreed to serve as Co-Coordinator of Children and Youth Religious Education for the coming year.

The Board selected the winners of the Sybil Bernstein Award for 2022.

May 2022

On May 2 the search committee received a list of seven candidates. The work of interviewing, checking references and selecting began immediately and the team ranked the applicants. With 52 congregations in the search and only 44 applicants available, this was a nerve-wracking process. But on May 17 we were delighted to hear we had been matched with the Rev. Lisa Bovee-Kemper, who has been working as developmental minister at Greenville Unitarian Universalist Fellowship of Greenville, South Carolina. The team completed work on the contract, and we were able to announce her selection to the congregation on May 22.

The board unanimously approved a 2022-23 budget that includes significant raises for staff, recognizing the rising cost of living and the increased demands that the transition is putting on all of them.

Paul Wilson and Kurt Merkle were elected co-chairs for 2022-23, and Lisa Hagen was elected secretary.

The board began planning for the June 5 congregational conversation and for farewell events for Jay Leach in July.

Summary for the end of the year

This year has been stressful in any number of ways, but its central theme has been the high level of cooperation, comity, and resilience among the Staff, the Board, and the Congregation. Faced with major uncertainties at the beginning of the year and working throughout to bring the Community together in the face of those uncertainties, the Board has tried hard to enlarge avenues of communication and to listen carefully to what the Congregation says to us, now and in the future. The Staff has been magnificent throughout, guiding and supporting our work with information, innovative ideas in problem-solving, and courage in the face of so many major changes. We offer our profound thanks to Ministers, Staff, and Congregation as we work together to sustain our Community while making the changes we need for that work.

Respectfully submitted,
Ann Doss Helms and Paul Wilson, Co-Chairs, Board of Trustees

MINISTER

Annual Report 2021-2022

Submitted by Rev. James C. (Jay) Leach, Minister

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Of the nineteen years that I have served as your minister, this is, by far, the one that is most difficult to summarize. What follows melds more personal sentiments into my professional observations. This report remains, to be honest, a work in process, this version a product of the demand of our production schedule more than one offering a sufficiently comprehensive account.

A year ago, we were a congregation that had not met in person in fourteen months. While we had created a robust virtual presence and had found creative ways to use technology to offer weekly services, educational offerings and social opportunities, it became increasingly clear that—as with all other institutions—the UUCC was being permanently altered by the pandemic. Now, as yet another variant is prompting yet another spike in COVID-19 cases, how we have been changed and who this community will become are matters that remain largely unexplored and completely unsettled.

The 2020 – 2021 congregational year ended with portents of the upheaval that lay ahead. Along with the pandemic, the past thirteen months had included the retirement of three long-serving members of our professional staff. We were still trying to find a new rhythm in the aftermath of their departures. Much was unsettled and unsettling, we were weary and not a little anxious, and our capacity to make even short-term plans was significantly hampered by so many unknowns.

Adding to our institutional uncertainties, Rev. Eve Stevens approached me in June 2021 to discuss her awareness that she was finding the tension between the demands of being a minister and the desire to be a more present parent of two young children untenable. She informed me that she had come to the clear conclusion that she no longer wished to be a minister. At the same time, she asked for the opportunity to be in her role for one more congregational year. As Eve’s decision was shared early into this new congregational year and then as she accelerated her plans for departure early in this calendar year, the congregation became aware that even more change would be a part of our near future.

We introduced a new theme “Beginning Again; Seeing Anew” and began planning and offering programming around it. In the course of this year we found our way from pre-recorded services that “premiered” on Sunday mornings, to small groups seated silently in the Sanctuary as we learned anew how to create services for live-streaming on Sunday morning and archived viewing later, to safely-distanced and masked services requiring advanced sign-ups (with the pews bizarrely marked by blue tape indicating available seating), to fully open, masked services with coffee served afterward outside in the traffic circle, and, at very long last, to fully open, mask-optional services with a return to a social time in Freeman Hall both before and after our 11:15 service.

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As of this writing, the larger contingent for our Sunday services continues to be the group accessing the service on a screen, either in its livestreamed or archived version. The demand to create fully “hybrid” services in which both those gathered at 234 and those watching elsewhere are engaged has proven to be yet another challenge requiring imagination, creativity, technical assistance and significant professional and volunteer time. I’m proud of the ways we have pivoted throughout the constantly shifting situation while I’m also deeply aware that the unrelenting unknowns and the perpetual need to hope, plan, change and then reevaluate has made this one of the most difficult chapters in my decades of professional ministry.

Our experience with Sunday services is exemplary of the challenges throughout our system. Over the course of this congregational year, our other programming has cycled through various forms as well. While many things have gradually returned to their more recognizable forms, much still remains virtual. After many different iterations, there’s finally a renewed sense of energy here at 234. Our Open Door School is at capacity each day, Children and Youth Religious Education offerings—including another Coming of Age experience—have ramped back up, adult classes and Credo presentations are taking place, Discovery Circles are meeting, choir rehearsals are happening, and meetings of various kinds keep our lights on some evenings during the week again. (That said, many team meetings and other kinds of meetings continue to be held on Zoom, a format appreciated for its accessibility and ease, especially by those who live at some distance from our facility.) We’ve added Community Building activities back into our rhythm, taking advantage of our new fire pit area, gathering at local museums, staging celebrations in the parking lot and at other locales. We are making small steps toward reengaging in the larger community in Intersectional Justice efforts.

For all of our recent efforts, many questions remain. We know we’ve been unalterably changed by the pandemic, accelerating some of the changes that were inevitable both within Unitarian Universalism and within organized religion in general. We have not even begun to ask how we have been changed and what that means for our future. The place of this community in the lives of our members, the willingness to offer the necessary financial support for the UUCC to thrive, the courage and commitment to reimagine who we can and should be, the capacity to reach out to and attract participation from those who more closely reflect the dynamic and shifting demographics in our region, the willingness to continue struggling with the realities of systemic injustices—these remain unknowns.

In the course of this congregational year, several factors conspired to propel me into a time of discernment, prompting deep ponderings about my personal and professional trajectory. These past two years have been marked by personal and professional challenges that leave me feeling depleted and less confident about my capacities to lead. Eve Stevens’ decision to leave the ministry meant that the succession plan we had hoped might happen here was no longer an option. Uncertainty about the prospects for courageous change in our community and within Unitarian Universalism have made me question my ideological fit for this role in these times. My age alone makes me aware that the next long chapter in the UUCC’s story is not mine to lead.

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To these, there is another significant factor: my wife, Melissa, has continued to deepen her professional engagement as the minister of the Unitarian Universalist Church of Catawba Valley in Hickory, N.C. while continuing with her roles as an educator in the Mecklenburg County Jail and as an advocate in our larger community. And yet, as has been the case since our arrival here in Charlotte, Melissa has continued to allow the demands of my role as minister here to take precedence in the rhythm of our family's life.

When I reflected on all of these dynamics, I came to the difficult decision that this was an appropriate time for me to resign as the minister of the UUCC. I will be forever grateful to Board Co-Chairs Ann Doss Helms and Paul Wilson for their grace and kindness as I approached them to talk through my difficult discernment. They were exemplary both in their commitment to the wellbeing of the congregation and in their personal concern for me. As Ann and Paul presented my deliberations to the full Board, they too were kind and generously affirming. I am deeply appreciative.

I remain convinced that there can be some very good days ahead in a revitalized congregation under new leadership. We have four truly remarkable professional staff people whose committed involvement will help sustain this community. Nothing gives me greater satisfaction than I have felt in inviting Alesia Hutto, Belinda Parry, John Herrick and Kelly Greene to join this professional staff and in watching each of them grow and develop in their respective roles. No words can adequately express the respect and appreciation I have for each of them. The UUCC is being very well served by these members of our professional staff.

With an openness to rethink and a willingness to recommit, the UUCC can continue to be a supportive presence for its members while developing a vital voice in the increasingly complex conversations in our region. It will surprise no one who has listened to me for nineteen years to know that I remain convinced that the most promising path is not one leading back to something that once was but one calling this community forward to something that you have not yet even begun to imagine. While there are those within Unitarian Universalism pleading for a return to some prior version of our liberating religion, I find far more hopeful prospects among those calling both for a more transparent truth-telling about who we have been and for a reimagining of and accountability to who we can and should be.

You were the community that called me in the spring of 2003 and welcomed Melissa and me later that summer. You celebrated our marriage and the birth of our child. You've encouraged Emerson to grow and develop and have been an important source of support as Melissa's self-understanding as a professional minister has shifted and changed. You've been our spiritual home, a place of nurture and comfort for all three of us, sharing in our celebrations, sympathizing in our times of loss.

MINISTER

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You've supported me as I have attempted to lead, often encouraging of my strengths, frequently forgiving of my limitations and shortcomings. You've joined me in leadership of our services, your role as lay service leaders enriching what we've offered and your presence as musicians immeasurably deepening what we have experienced. You've been partners in care for members in need. You've helped me lead core groups and classes and participated in efforts to engage in our larger community. You've worked alongside me on countless teams, boards, task forces, subgroups and planning groups. You've volunteered in so many roles. You've sanctioned my voice and presence in the larger community even when you did not always share in my perspective or intentions. You've made it possible for me to become an influence in our larger movement through my leadership of the senior ministers of our largest congregations and on national boards. And some of you have been exemplary in your generous financial support, making all that we have done possible.

Our successes have been many and each of them has been shared; everything we have accomplished is a testimony to collaborative leadership between me, the group of remarkable professionals with whom I have been privileged to work, and the members of this community. I'm proud of so much of what we've done even as I remain my most demanding critic for what could and should have been. The depth of my appreciation and affection leaves me without words adequate to express either.

As I leave you later this summer, much of my heart will remain here. From the necessary distance required by the guidelines to which Unitarian Universalist ministers commit, I will be hoping and praying that you will thrive as never before. Charlotte and this region desperately need what you can offer if you will find the courage to make the dramatic changes these times demand and offer the good news of our liberating religion in way you have yet to discover.

In the words of the Dag Hammarskjöld: "For all that has been, Thanks. To all that shall be, Yes!"

Love,

Jay

ADULT RELIGIOUS EDUCATION AND SPIRITUAL DEVELOPMENT

Annual Report 2021-2022

Submitted by: Sharon Baker, Programming Coordinator

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Under the guidance of Adult Programming Coordinator Sharon Baker, this year's Adult Religious Education/Spiritual Development Team provided an array of online and in-person programs for UUCC. Team members included: Tom Cole, Althea Clark, Bob Gorman, Joe Hoff, Cyndi Martinec, and Laurie O'Sullivan. Jay Leach served as the professional staff liaison to this Team.

Our ARES D Team took seriously our Vision and Mission and this year's theme—"Beginning Again: Seeing Anew"—and used these to guide their offerings. The Team offered members and guests one-time classes (some of which were held in person and then again on Zoom), series, and discussions of documentaries and a movie. Members explored the 7 UU Principles and the history behind the development of the proposed 8th Principle; racial justice through the lens of the Black Church; environmental issues via the United Nations' Sustainable Development Goals and an MIT-based climate change model; and how the assault on voting rights is affecting our democracy. Other course offerings invited participants to reflect on how our congregation can create a culture of welcome and ways to maintain hope during these divisive times.

A monthly documentary series—Seeing Anew: Stories of Rediscovery—offered facilitated discussions led by UUUC members with specialized knowledge of each film's content. The series included stories of personal struggles and triumphs as well as an examination of serious topics such as the homeless in Charlotte, rights for the disabled, foreign influence on American manufacturing, and how media (often negatively) portrays transgenders. Participation often ranged in the double digits, and discussions proved educational and engaging.

Programs examining spirituality in action and the spirituality of "found poetry" were also included in this year's offerings.

The ARES D Team once again rose to the occasion in a challenging year. We've been enriched, supported, challenged, educated and encouraged by what they have offered us this year.

RELIGIOUS EDUCATION FOR CHILDREN AND YOUTH

Annual Report 2021-2022

Submitted by: Eve Stevens, Staff Liaison

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The CYRE Team this year included: Joe Argent, Emily Boone, Michael Amy Cira, Kendra Dixon (took minutes), David Flynn, Nathan Hackenberg, Tracy Hickman, Cecily Manejwala, Melissa Schropp, Lisa Walls (chair) and Kevin Yount

When the search for an Interim Director of Lifespan Religious Education did not result in a match, we had the good fortune of hiring three dedicated members with years of experience in CYRE as contract staff to coordinate and lead programming. Melissa Schropp agreed to take on our nursery and SpiritPlay classes while lending a hand to help with the Coming of Age retreat and organizing attendance of Cons at The Mountain retreat center. Lisa Walls agreed to continue on and took over elementary age programming as well as leading Coming of Age and Our Whole Lives organizing. Michael Amy Cira took on our Middle and High School classes and worked with Lisa to lead Coming of Age as well. This trio, working with Eve, tackled an intimidating amount of programming this year, in a time when many children and youth religious education programs took an extended hiatus.

The youngest children gathered outdoors most of the year for their SpiritPlay lessons. Melissa recruited nursery staff, and we began offering nursery care in March but have had very few takers. Our elementary classes engaged in a curriculum called, "Windows and Mirrors" that invited children to grow in their awareness of how they see themselves and the world around them. They have worked diligently on a communal art project throughout the year that was displayed for the congregation to see on May 22. The Middle School class started off with a program called "Lodestone" which demands regular attendance and in depth planning from advisors. Attendance was spotty for the class and advisors resorted to an eclectic approach that included arts and crafts projects, lessons from the world's religions and environmental and racial justice conversations. The High School group continued with their tradition of check-in and casual conversation and have begun monthly social gatherings outside of class. They led a service on May 22.

Coming of Age has been consistently attended by a moderate-sized group of youth and their mentors. They have enjoyed in-person retreats and meetings. The youth presented their Credo to the congregation in mid-May. In addition, the Boston Trip, after years of not being able to go, is back on track to happen this summer. This program should be counted as a wild success, connecting youth in a consistent and meaningful way outside of Sunday mornings in a year when class attendance across age groups is down.

Lisa Walls also successfully recruited enough participants to hold a Middle School Our Whole Lives (OWL) class. There was a handful of parents interested in a K-1 OWL class as well that may happen in the future. The CYRE Coordinators are recruiting new OWL facilitators to be trained this summer in hopes of expanding how this program is offered.

COMMUNITY BUILDING

Annual Report 2021-2022

Submitted by Eve Stevens, Staff Liaison

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The Community Building Team this year was: Althea Clark, Chip Dickerson, Jeannie Fennell, Megan Hendler, Sue Hill, Lisa Marie Nisely and Julie Prentice.

The Team has enjoyed bringing back some in-person programming opportunities this year, while also continuing virtual offerings. We began the congregational year with only virtual coffee hour as an option. This weekly event was attended by a good number of visitors who received warm welcome from members. The group remained small, but a dedicated cohort developed for whom virtual coffee hour was their main source of connection with the congregation. We were delighted to bring back in-person coffee hour in March, first having Starbucks outside in the traffic circle and then, beginning in April, back in Freeman Hall. Kelly Greene and Eve Stevens hosted a training for former and new coffee service volunteers and have been filled with gratitude by their good energy and commitment to one of our most labor-intensive volunteer roles.

The team partnered with Stewardship to offer several in-person Member Appreciation events on the UUCC grounds that had good energy and attendance. The team looks forward to continuing this tradition.

Aside from those Member Appreciation events, we focused more this year on creating small group opportunities. Virtual Social Suppers happened over Zoom, game nights and opportunities to engage in shared hobbies such as an interest in outer space or butterfly habitats were among the virtual offerings. In-person opportunities have included fun around the firepit, hikes, museum visits, garden and mural tours around Charlotte. The Pie Walk at Maple Walk and Plant Swap in the fall were both popular events a second year in a row.

Community Building Affinity Groups:

- “Cold Reads” Play Group
- Cycling Group
- (dis)Able Support and Advocacy Group
- Hiking Group
- Luna Rising
- Senior Connections
- Walking Group

CONGREGATIONAL CARE

Annual Report 2021-2022

Submitted by Eve Stevens, Staff Liaison

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This year the Congregational Care Team has gone above and beyond even their usual attention to detail, compassionate and consistent outreach, and show of thoughtful support for members in times of crisis and celebration. Members of the team are Sage Brook, Craig Corzine, DeWitt Crosby, Annie Flint, Bill Gay, Nancy Greene, Sheila Lay (Chair), Judy Love, Linn Martin, Jan McNeely, and Greg Schropp.

Multiple members of the team provided rides to people for medical appointments or following surgery, paid visits to home-bound members, and delivered meals. In addition to taking organized and effective minutes for team meetings, Jan McNeely also took over as the lead on sending cards this year. Jan proposed a new card format that was approved by staff early in the congregational year. We now send cards with photos taken by Minister, Jay Leach on the front and try to highlight scenes from around the UCC as often as possible.

The team decided, for the first time, to send a holiday card to every member of the congregation, feeling this would help those who have not been able to connect as much with us during the pandemic feel valued and loved. Specific cards were mailed to those who had experienced a serious illness or the loss of a loved one in the past year.

In the past, Healing Threads, an Affinity Group led by Kathleen Moloney Tarr, has made prayer shawls that are given to our members who have lost a partner or child, sending additional shawls to Hospice as well. After careful consideration, the Congregational Care Team worked with the Affinity Group to approve loosening the guidelines around who receives these prayer shawls. At present, there are an abundance of shawls, and the team will now use case by case discretion to determine when to deliver a prayer shawl to any member of the congregation. This year, we gave 26 shawls to Hospice and 20 to Kinder-Mourn, which is a new partnership we are pleased to have.

This team continues to be an incredibly committed and organized group under the leadership of Chair, Sheila Lay. Sheila goes above and beyond to rally team members to provide personal and compassionate care, often stepping in when no one else is available to make a visit or a meal for someone in need. Sheila has agreed to mentor Linn Martin as co-chairs for a few months before handing off the role to Linn.

It has been energizing to have 4 new team members this year and the team is looking forward to welcoming 4 more in August. Most members will continue for now and reassess later in the fall what the needs are due to staff changes and whether or not it is necessary to maintain a large team.

FAMILY MINISTRY

Annual Report 2021-2022

Submitted by: Eve Stevens, Staff Liaison

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The Family Ministry Team this year included Lynne Friedheim, Melanie Greely, Jenn McLeod, Bryce Nielsen, Sophie Snyder and Samantha Visco

Family Ministry created a handful of opportunities for parent support and family learning and fun. The Parent Discovery Circle continued to meet facilitated by Jasmine Hathaway and Stef Smith. One Sunday a month over summer 2021 was dedicated to family programming, inviting families to participate in a lesson exploring the summer theme "...roots hold me close..." together. The team also brought in a child therapist to meet with parents to talk about depression and anxiety in teens exacerbated by the pandemic and to answer parents' questions. At Halloween, the team put on a Trunk-or-Treat event that was wildly popular. Members dressed up in their Halloween finery to host trick-or-treat stations out of their trunks. There was a huge turnout, and the team is considering hosting this event again rather than a Halloween party in the future. The team also created a Farewell to Winter Workshop event that saw small attendance but a great mix of children, youth and adults.

INTERSECTIONAL JUSTICE TEAM

Annual Report 2021-2022

Submitted by Jay Leach, Staff Liaison

Page 1 of 3

Our commitment to intersectional justice has emerged from the challenges of the pandemic and is beginning to take new shape as new opportunities for engagement are being explored and offered.

This year's team—Manny Allen, Shannon Maples, Rebekah Visco, Dave Walsh and Janet Zick—have preserved, showing admirable commitment. Sadly, the team lost a new, beloved member, Neal Sigmon, in the course of this year. Neal's decades of commitment to a better world inspired all of us and his legacy will remain among us.

The team spent the fall revisiting its structure and the Guiding Principles created to offer direction to the engagement process. The Guiding Principles were revised in the hopes that a simpler, less idealistic version might prove to be more of an aid and less of a barrier. The new version is as follows:

Guiding Principles Update Fall, 2021

Purpose of guiding principles:

- to help ensure lessons learned by Core Groups are applied in the search for opportunities for engagement
- to help ensure we collectively avoid “white savior” mentality or work efforts

Engagement efforts for the congregation should ideally consider each of the guiding principles as a spectrum, not as yes/no. (i.e., ask “to what extent does the group meet the spirit and intent of the criteria” instead of “does the group meet this criterion”)

Recognizing few opportunities will score highly on every single item, consider primary ones as more essential.

Primary Principles:

- share our historical understanding of, our analysis of, and our focus on solutions to systemic injustice
- have transformation as their ultimate goal by offering something other than charity
- be led by those most affected by the injustice (recognize that those directly impacted have more authority on this issue)

INTERSECTIONAL JUSTICE TEAM

Page 2 of 3

These 3 have significant overlap: A group that shares our historical understanding of systemic injustice is highly likely to be both:

1. focused on systemic solutions. Systemic solutions will be offering something beyond charity and will be focused on dismantling or changing current systems (transformation as ultimate goal).
2. led by those most impacted by injustice or highly attentive and respectful to the perspective of those most impacted by it (recognizing that those most directly impacted do not always have capacity to lead efforts).

Secondary Guiding Principles

- be supported by and have a high level of participation from the community they serve
- challenge existing institutions
- be open to our spiritual focus (recognize that these are moral issues)
- understand the importance of intersectionality
- understand collective liberation* (*Collective Liberation: “I understand that my liberation is tied to yours.”)
- offer the potential to develop a long-term, trusting relationship with sustained congregational engagement
- allow us to do work that aligns with our principles, our vision, and our mission
- allow us to focus on working in solidarity*, opportunities to be more than just allies (*Solidarity: “an act of bonding with people struggling for their liberation. The solidarity is with resistance fighters, those who are carrying out the resistance struggle. The resisters initiate the struggle. We respond with our solidarity.”)
- reflect demonstrated effectiveness and a local focus/impact with the opportunity for our involvement to make a difference
- offer multiple levels of participation

In conjunction with the restructuring, the team met with those who have been involved in the engagement process in an effort to determine what might enhance the functioning of this process. After lengthy discussion, the team and engagement members decided to discontinue four separate engagement groups and create a single group focused comprehensively on opportunities for involvement in the larger community. The newly created Intersectional Engagement Group includes: Susan Cox, Marsha Kelly, Julie Prentiss, Debbie Rubenstein, and Kathryn Whitfield with Richard Pratt as the newly selected Chair.

We continued our involvement with the ReEntry Housing Alliance and are in the early stages of newly forming co-conspiracies with GreenFaith, the Mis Amigos Project, Compassion Closet and Erika’s Closet. We’re hopeful that the coming months will present several more avenues for engagement as we slowly expand our efforts.

INTERSECTIONAL JUSTICE TEAM

Page 3 of 3

Regrettably, the 2021 – 2022 congregational year proved to be a setback for our core group efforts. We presented the opportunity for participation in only one group this year—the third version of the Racial Justice Core Group. Offered, by necessity, only in virtual form, there was very little interest expressed in participation and the group was cancelled. How this effort gets revitalized and sustained is one of many questions we face going forward.

The new practice of “Share the Plate” has proven beneficial to our intersectional justice efforts. Our April recipient was GreenFaith, and May had us offering additional financial support to the ReEntry Housing Alliance. This should continue to create a way both to publicize and to support our partnerships.

MEMBERSHIP

Annual Report 2021-2022

Submitted by Kelly Greene, Staff Liaison

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The Membership Team looks for ways to improve the welcoming and engagement of visitors, new members and existing members. Lincoln Baxter, Catherine Covington-East, Rita Heath-Singer, Linn Martin, Claire Lukens, Meagan O'Connor and Liza Pratt served on the Membership Team this year. Kelly Greene was the staff liaison.

At the start of this congregational year services, meetings, congregational activities, etc. were happening virtually. Though this was comfortable for some members, others strongly disliked participating this way and declined to do so. Members did gather at outdoor activities such as Summer Sing, a plant swap and a parent support group in the parking lot. As we began meeting in person again, first masked, then eventually mask-optional, members' comfort level with being in person has varied from person to person. Some have been excited to be together. Others feel out of the habit and have not returned. Since children were not able to get vaccinated against COVID-19 as soon as adults were, many parents were initially less comfortable attending in person. Many children had been doing school virtually, which required the assistance of parents who might have needed to do that while trying to work. Parents have reported feeling exhausted and overwhelmed. Religious education programs at a range of religious communities have struggled this year. Throughout the U.S. adults have been rethinking their commitments, relationships, how they spend their time, etc. Some, including some of our members, have changed or left careers as a result, part of "the great resignation." While some of our members have been less involved than before, others are more involved than they had been. Some members are anxious about the departure of the two ministers we had at the beginning of this year. Others are excited about the possibilities. We have a strong core of dedicated members. We also continue to attract visitors and new members – many of whom found us virtually.

As of April 30, 2022, membership is 577. This is down from 592 at the start of this year. Nineteen members resigned. Four moved. Three died. Reasons for resignations included being on a different spiritual path, no longer being involved and being dissatisfied with leadership. These removals do not include Board removals of members who have not given a contribution of record in the last 12 months. Since we did not do a Board removal last year either, the next one will likely be larger than usual.

This year, we have also added 16 new adult members who joined with six children. We are meeting in person visitors who had only experienced us through YouTube, Facebook or Zoom. We continued to offer visitor sessions, virtually and then in person. Many of our recent visitors are skewing under 50 years old. Visitors are quicker to sign up for our newsletter then remove themselves from our email list after a few months than previously. Before the pandemic, new members overwhelmingly said they came to UUCC to find a community of like-minded people. Now, more people say they are looking for spiritual development.

This year, as many things in the greater culture and at UUCC are being reimagined, Membership will explore new ways to engage newcomers, recognizing that the culture has changed and how we did things previously might no longer be effective.

MUSIC
Annual Report 2021-2022
Submitted by John Herrick, Staff Liaison
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The Music Team this year was comprised of Ben Schomp (chair), Debbie Marr, Janet Palmer and Nancy Wielunski, working in conjunction with Director of Music John Herrick to ensure the vitality of our musical offerings this year and to continue the important task of building community through music.

The year started off in July with virtual-only services with pre-recorded music—John was able to draw from the archive of recorded music from the previous year and provide additional recorded music when needed. Live gatherings during the summer consisted of outdoor choir rehearsals (initially with masks on) and Summer Sing! (hymn sing) on Sunday mornings in the driveway circle, open to all members of the congregation. The fall saw the return of Children’s Choir rehearsals and a continuation of Adult Choir rehearsals, both outside, while the Handbell Ensemble started rehearsing indoors. With the return of in-person (limited attendance) services in the fall, the choir pre-recorded pieces and the Handbell Ensemble performed live. In November and with lower Covid infection numbers, came the return of indoor Adult Choir rehearsals, but with masks on; Children’s Choir rehearsals continued to meet outside until December, then took a break due to cold weather until March, when volunteer leaders led rehearsals (John was needed in the sanctuary for service tech run-throughs). The first choral singing in services took place on Sunday, March 6 with the UUCW Women’s Chorus, followed on Sunday, March 13 with the UUCW Chamber Choir. The full Adult Choir sang for the first time on Easter/Passover Sunday on April 17. The Handbell Ensemble continued to play in services. Special musical guests over the year included cellist Tanja Bechtler and guitarist Bob Teixeira, the Jessica Borgnis Trio, the Ocie Davis Trio, violinist Sabu Yamamoto, and clarinetists Kinsey Fournier and Daniel Martinec. Also performing in services were the UUCW Band and instrumental and vocal soloists from the congregation.

A musical highlight of the year was the April 3 “Spring Soiree” evening concert and pre-concert reception, featuring Charlotte Symphony musicians Andrea Mumm (principal harpist) and Victor Wang (principal flutist). The event was made possible by UUCW Member Larry Bennett, who made a generous contribution to the Charlotte Symphony, and co-sponsored by the Music Team and Stewardship Team (as a member appreciation event). The event drew 80 people and was the first concert in over two years at the UUCW. The reception was also a first and was beautifully organized by UUCW volunteers and led by Sheila Lay.

As of the writing of this report, plans are underway for “Music Sunday” on June 12 and the return of Summer Choir with social activities planned throughout the summer.

SMALL GROUP MINISTRY STEERING TEAM

Annual Report: 2021-2022
Submitted by Eve Stevens, Staff Liaison
Page 1 of 1

The Small Group Ministry Steering Team (SGMST) is composed of our Discovery Circle facilitators Linn Martin, Sabina London, Cyndi Martinec and Susan Hill with lead session writer, Camilla Mazzotta.

We had two regular Discovery Circles (one fewer than last year), one meeting in-person and one on Zoom. Both groups were larger than usual to start, but after a few people dropped out, both had 9 participants. We also had one Parent Discovery Circle (overseen by the Family Ministry Team) this year. Camilla Mazzotta continued to create meaningful, quality opportunities for deep reflection and personal sharing which the team then edited and added to, to create the final session plans.

Session topics this year included: Change, UU Wheel of Life, Wintering, and Color in Our World.

Facilitators have reported good group chemistry for both Discovery Circles this year and a deeper level of bonding as people navigated the ups and downs of the pandemic.

Both Discovery Circles decided to continue with the tradition of participating in a service project and will be working through Marsha Kelly of our Intersectional Engagement Group to connect with ways of supporting immigrant communities in the Charlotte area.

Circle members also provided meals for one another during times of illness and struggle.

After a time of discernment, given reduced staff capacity in the coming months and much change on the horizon, the SGMST has decided to wait until January 2023 to begin Discovery Circles again. Camilla will continue to write sessions and other members of the team have agreed to do even more than usual, recruiting facilitators, creating each group and promoting Discovery Circles to take that off of staff's plate.

WORSHIP
Annual Report 2021-2022

For a comprehensive report on worship this year, please see the Minister's Report.

DIRECTOR OF ADMINISTRATION REPORT

Annual Report 2021-2022

Submitted by Alesia Hutto, Director of Administration

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This is my second year in this role after being a part of this wonder staff for over 16 years. Despite being in a pandemic since March 2020, this congregation continued to thrive under the strong leadership of minister Jay Leach, with the support of second minister Eve Stevens. We continue to benefit from a committed professional staff and a resolute group of committed volunteers.

Staffing

The 2021-2022 congregational year ended with staff transitions. Eve Stevens, our talented second minister left the congregation on Sunday, May 1 and Jay Leach, our long-time minister and chief of staff will depart on July 31, 2022. They both provided an invaluable level of service to the congregation and will be missed. A celebration was held in Eve's honor on Sunday, May 1 and plans are underway to celebrate Jay's ministry in July.

Overall Financial Picture for 2021-2022

The Finance Team for the fiscal year of 2021-2022 has been Chaired by Mary Hackenberg. Other members of the Finance Team include John Lee, Melissa Vullo, Chip Dickerson, and Joe Simmons. George Ladner stayed with us for part of the year as an extension of his three-year term, as we had an unfilled seat without him.

The recent years have made budgeting a challenge, but like years past we continue to budget conservatively, and as a result, we have been able to out-perform our budget for several years in a row. For the current fiscal year, a deficit was projected but it appears that we will end the year with a considerable surplus. As of the printing of this report, we anticipate a surplus of approximately \$80,000 at the end of the congregational year.

In conjunction with the Coordinating Team, and Treasurer, Ron Macaroni, a decision has been made to pay off the UUCC mortgage in June, even though it will likely take us below the \$250,000 threshold. This will have a major impact on the upcoming year's budget as we currently budget \$44,000 annually for mortgage payments. We are now proposing a budget that will allocate \$24,000 in the coming year to reserves which will still result in a net savings of \$20,000 in expenses. At this rate, in less than two years, our reserves would be back over \$250,000. In summary, we will have a debt-free congregation, \$20,000 net savings in expenses, and reserves returning close to the target amount recommended by the Finance Team and approved by the Board of Trustees.

DIRECTOR OF ADMINISTRATION REPORT

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Budgeting & Stewardship

The budget process has been more challenging with the year-round pledging. Year-round pledging offers the opportunity for more member-to-member stewardship conversations and the opportunity to move the needle on expected income throughout the year. However, we must admit that it also comes with downsides, one of which is added uncertainty. The pledge cycles of most of our members straddle fiscal years, and although we still have their promises to pay--same as before--no one promises to pay on a particular schedule, so we do not know for certain in which fiscal year it will come in! If not in this fiscal year, then we can only assume in the next.

The Stewardship Team encouraged generosity at the 5% level across the board through direct messaging in stewardship materials, peer-to-peer canvassing efforts, messaging through monthly stewardship captains who act as “cheerleaders” by offering testimony and encouraging financial commitment, through recorded and live monthly stewardship messages for Sunday services and regular notices in Currents. We thanked members who pledged with a letter from the congregation signed by the minister and stewardship team chair, and a handwritten thank you note was sent from the team and with a handmade craft from our CYRE youth to those who pledged generously.

The strategy for the 2021-2022 congregational year has been to move the needle forward amongst those not considered our largest pledgers. Despite our best efforts, this year’s campaign has proven difficult given that members are not as engaged in the life of the Community as expected and the lingering effects of the pandemic. Monthly pledge response rates averaged 51%. One bright spot is that we have higher than expected New Member pledges totaling \$25,000. In summary, existing pledges are down, but that reduction is offset by new member pledges which equates to a total loss over last year of \$66,000 compared to last year’s pledge total as of May 15. Considering this reduction and our other sources of income, we anticipate a net reduction in overall income closer to \$36,000.

Despite this anticipated reduction in income, on June 5th we will present a balanced budget to the congregation. This is mostly due to understaffing and the savings gained from retiring our mortgage.

We must increase income in the coming fiscal year if we want to add additional staff. With the loss of our two ministers in the current year and the anticipation of an Interim Minister, we will have yet one more year of uncertainty. We hope that with all of this change we can begin to examine who we are as a congregation post-pandemic and for the years to come. This can be an exciting time at the UUCC, but we need our members to respond generously to our stewardship efforts in the coming year.

DIRECTOR OF ADMINISTRATION REPORT

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MET Grant Program

Our Endowment is now valued at well over \$1 million dollars and for the last several years has been funding important improvements and programs that would not have been possible through the operating budget. Without a doubt the Memorial Endowment Trust's (MET's) grant program is making a huge impact on the congregation. In this past year it has funded updating the aesthetics of our Sanctuary, adding hybrid meeting capabilities to our most used meeting spaces, updating our interior signage with our new logo and branding and installing hearing loops in the Bernstein Room.

The Endowment Trustees announced in January that there is \$44,000 available for potential grants for the 2022-2023 congregational year. The Trustees reviewed grant proposals at their April meeting and will determine which grants will be awarded at their May meeting. The grants awarded will be announced at the annual Congregational Conversation on June 5.

In Thanks

I would like to take this opportunity to thank the “super volunteers” who do so much to keep this place running with a special thanks to Ron Maccaroni who continues as our high-performing volunteer Treasurer. There are many others who have been invaluable to my role of Director of Administration—Suzanne Clements, Mary Hackenberg, Franklin McClelland, Tom Nunnenkamp and Roy Smith. There are other volunteers who have been stellar in their support, I cannot list everyone, but you know who you are. I appreciate all that you do.

I thank my colleagues for making this another rewarding year despite the pandemic.

BUILDING AND GROUNDS

Annual Report 2021-2022
submitted by Roy Smith, Chair
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The Building and Grounds (B&G) Team members include David Johnson, Judy Love, Dan Maples, Tom Moore, Charles Pilkey, Roy Smith, and Virginia Sullivan. Alesia Hutto, UUCC Director of Administration serves as liaison to the team.

Despite the ongoing pandemic, the Building and Grounds Team continued to be very active this year. The team was able to hold one building and grounds workday on Saturday, April 9 at 9:00 a.m. which was open to volunteers. We would like to thank Lesha Dodson, Kelly Greene, and Julie Smith for their help.

Through the hard work of the team members and a few volunteers, we managed to complete several projects. Projects completed during the past year include:

- Design and installation of the new exterior signs.
- Stair nosing project in the vestibule.
- Project to display the art donated by Judy Ghoneim.
- Began a written system to track our projects which will also provide a historical record of projects undertaken by the Building and Grounds Team for future reference.
- Installation of the Bernstein Room hearing loops.
- New pulpit for the sanctuary was produced and installed.
- Removal of the small dead trees adjacent to the traffic circle.
- Pressure washing of the patio, sidewalks, and benches.
- A decorative metal cover for our new fire pit was fabricated by Charles Pilkey.
- Upgrades were made to the exhaust fans in the bathrooms to reduce the possibility of the spread of viruses.
- Repairs were made to the ceiling over the closet in the education wing.
- Repairs were made to the fire escape stairway leading to Playground 3 (“the 2’s playground”).
- Treatment twice a week for the slime flux infestation in the large oak next to our sidewalk leading from Hardwick Rd.

Upcoming and ongoing projects:

- Address the rainwater flooding problem around the door to the Playground 3.
- Look into replacing the sheds on the playgrounds.
- Explore options for awnings over the exterior doors.
- Install low voltage landscape lighting along the sidewalks and patio with a goal of improving the safety and security of members and staff coming and going from the building after dark. This lighting will also be designed to make the patio and firepit areas more inviting for UUCC events after dark.
- Coordinate an assessment of our trees by a certified arborist who is familiar with our property.

COMMUNICATIONS

Annual Report 2021-2022

Submitted by Belinda Parry, Staff Liaison

page 1 of 1

The Communications Team was chaired by Erin Maness this year. Other team members were Dave Dixon, Debbie Rubenstein, and Scott Smith. Ele Palmer was a team member until she resigned from the UUCC.

The Communications Team provides graphics, design, writing, photography, web and social media services directly to UUCC staff, teams, and task groups for smaller-scale projects and works with contractors hired by the UUCC on larger projects. The team meets monthly to discuss current and ongoing projects. Additionally, individual team members may attend additional meetings as liaisons to teams or task groups that have communications projects or needs.

The Focus 2020 Task Group was created in 2019 to guide the congregation through the exploration of renaming, rebranding, and marketing. After skillfully navigating the name change from “Church” to “Community” and rebranding, which included choosing a new logo and color palette, the group found the marketing portion of their work halted due to the extended closure of the UUCC during the COVID-19 pandemic. Several members of the group met with Director of Administration, Alesia Hutto, and Belinda Parry, staff liaison to the Communications Team in spring of 2022 and expressed their intent to disband the task group, as they felt they had taken the project as far as they could. As a result, any marketing work will now be the responsibility of the Communications Team, with task group members offering to advise on an as needed basis. The team is now working on building the resources we will need to begin actively marketing outside the UUCC when the congregation is through this time of transition. The team believes that it would be difficult to “introduce” the UUCC when our leadership is in flux.

Throughout this program year, we have undertaken a review of the outdated UUCC Communications Policy. Our continuing work on bringing this up to date includes a survey of members and visitors about the effectiveness of our current communications platforms. We will use the results of this survey to shape communications in an increasingly technological world.

In addition, this year the team created a t-shirt design at the request of the Membership Team that includes the newest UUCC logo, tagline, and color palette.

FINANCE

Annual Report 2021-2022

Submitted by Mary Hackenberg, Chair

Page 1 of 2

The Finance Team for the fiscal year of 2021-2022 has been chaired by Mary Hackenberg. Other members of the Finance Team include John Lee, Melissa Vullo, Chip Dickerson, and Joe Simmons. George Ladner stayed with us for part of the year as an extension of his three-year term, as we had an unfilled seat without him. Alesia Hutto serves as the UUCC staff liaison to the Finance Team.

The Finance Team meets monthly, and the primary role of the Team is to monitor the financial operations of the UUCC. As a Team, we review the monthly financial statements including the UUCC Balance Sheet and the Profit and Loss Statement, comparing budget to actual and current year to prior year. We evaluate the overall fiscal situation of the UUCC with an eye toward financial solvency and preparedness.

The recent years have made budgeting a challenge. We have found that our Coordinating Team tends toward a conservative budget, and we have been able to out-perform our budget for several years in a row. For the current fiscal year, a deficit was projected in the budget, and it appears that we will end the year with a considerable surplus instead.

The Finance Team works closely with Alesia Hutto and the UUCC Coordinating Team, and some of the issues we addressed this past fiscal year, in addition to the monthly financial statements, are as follows:

1. The ongoing Pandemic has continued to challenge us financially across the board.
2. Our staffing never got to the situation that was budgeted, and most of our surplus comes from significantly lower personnel expenses than were expected. Mostly this was due to a lack of in-person activities. Partially it was due to our inability to find and hire suitable individuals for our job openings. Volunteers have filled in the holes in our staffing with great success for the short term.
3. We improved communication with the congregation about financial matters, adding a semi- annual financial update to Currents, and intentionally planning for transparency in disclosing the activity in the Reserves Fund as well as the Profit and Loss at the Annual presentation to the Congregation.
4. The Finance Team chair completed the internal financial audit of the Memorial Endowment Trust (MET) for the calendar year 2020. The internal audit for the MET for 2021 is in progress.
5. In conjunction with the Coordinating Team, and Treasurer, Ron Macaroni, a decision has been made to pay off the UUCC mortgage this summer, even though it will likely take us below the \$250,000 threshold the Board intends to maintain. The monthly savings will help us offer a balanced budget for 22-23, and said budget will include a plan to replenish the Reserves Fund if necessary, after the current year surplus is closed into it.

FINANCE

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The Finance Team meets on the second Tuesday of each month and keeps a close watch on the financial operations of the UUCU. If there is anything a UUCU member believes that the Finance Team should discuss, please contact the chair prior to one of our meetings.

THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE

2021 Annual Report (For Calendar Year 2021)

Submitted by: Tom Nunnenkamp, Chair of MET Board of Trustees

Page 1 of 6

The **Mission Statement** of the Unitarian Universalist Community of Charlotte Memorial Endowment Trust (**MET**) as established by the Board of Trustees (**MET Board**) is as follows:

The Memorial Endowment Trust provides a perpetual, prudently managed fund for generous legacy giving to support the Unitarian Universalist Community of Charlotte, its present and future members, and its liberal religious mission.

At a regularly scheduled meeting held on June 3, 2018, the congregation of the Unitarian Universalist Community of Charlotte (UUCC) adopted the amended and restated Unitarian Universalist Community of Charlotte Memorial Endowment Trust Agreement (the 2018 Agreement). The 2018 Agreement made only minor technical amendments to the prior agreement adopted by the congregation in 2014 (the 2014 Agreement). As required by the 2018 Agreement, the MET Board submits the following annual accounting and report to the UUCC:

MET Board of Trustees

Fred Dodson

Rita Heath

MaryAnn Hendrick

Ellen Holliday

Patrick McNeely

Tom Nunnenkamp - chair

Legacy Society Membership

The Legacy Society consists of those UUCC members who have designated the MET as a beneficiary in their will, retirement plan documents, life insurance or other legacy documents. As of December 31, 2021, there were 61 families (or 86 individuals) who have declared themselves Legacy Society members.

Donor Development

Our strategy is to promote the MET to the members of our congregation throughout the year by various means, including:

1. Yearly mailings of individual Legacy Society members' profiles.
2. Communications in *Currents*, and Sunday service bulletins.
3. Periodic presentations from the pulpit.
4. Periodic after-service MET tables in Freeman Hall.
5. Periodic social events.

THE MEMORIAL ENDOWMENT TRUST

Our publicity stresses several important facts about legacy giving:

1. The MET is a charitable trust with tax advantages for donors.
2. Giving through estate planning does not affect one’s income stream.
3. Giving through estate planning can be as simple as adding the MET as a beneficiary to a life insurance policy, IRA or other retirement plan.

On approximately a quarterly basis throughout 2021, the MET Board ran articles in Currents listing people who have donated to the MET and the names of the people in whose name the money was given. In conjunction with those articles, typically the MET Board would set up and staff a table in Freeman Hall following the Sunday services to distribute material on Legacy Giving and talk with members about the MET. However, due to COVID that activity was suspended.

A profile of long-time member Simonne Lake was mailed to the congregation emphasizing her reasons for including the MET in her estate documents.

In 2021, the MET received 36 gifts and bequests in memory of or to honor UUCU members or their families. The total of the gifts and bequests for 2021 was \$52,073.

Contributions to the MET since 2005 are as follows:

Year	Total Contributions
2005	\$ 1,740
2006	\$22,900
2007	\$ 5,269
2008	\$43,743
2009	\$ 5,145
2010	\$ 7,590
2011	\$30,165
2012	\$27,245
2013	\$11,459
2014	\$ 5,080
2015	\$ 6,837
2016	\$133,517
2017	\$17,932
2018	\$5,650
2019	\$31,821
2020	\$51,493
2021	\$52,073

THE MEMORIAL ENDOWMENT TRUST

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Financial Review and Investment of MET Funds

The MET Rules and Procedures require the MET Board to have a financial review of the MET accounts and records conducted annually by the UUCS Finance Committee or its appointee. During 2021 the UUCS Finance Committee completed its 2020 financial review and found the MET accounts and records to be in good order,

Except for the funds held in a checking account to pay grants and cover routine expenses, all of the MET's funds are invested in the Unitarian Universalist Common Endowment Fund (the "UUCEF").

The UUCEF is a diversified investment fund created by the UUA for use by UU congregations and UU endowment funds like the MET. The overall investment objective of the UUCEF is to increase the fund's asset value in order to maintain the real purchasing power of the invested funds while allowing for regular distributions. Mindful of Unitarian Universalist values and principles, the UUCEF strives to achieve consistent returns within a moderate risk tolerance over the long term, sufficient to allow UU congregations and endowments to take regular distributions and maintain the value of principal after adjustment for inflation and after all expenses. It pursues this goal through diversification among asset classes (large cap equities, small cap equities, fixed income, global asset allocation funds, private capital, and hedge funds), geography (U.S., international developed markets and emerging markets) and investment managers, each with its own specialty. The UUCEF has a written Investment Policy and Guidelines, an Investment Committee, many of whom are professional money managers themselves, uses a professional investment advisor and has low investment fees. The MET Board feels the UUCEF is the best investment option for the MET's assets.

THE MEMORIAL ENDOWMENT TRUST

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MET Assets as of December 31, 2021

As of December 31, 2021 the MET assets consisted of \$1,104,656.55 in an investment account and \$17,530.29 in a checking account for a total of \$1,122,186.84, which represented an increase in the market value of the MET assets from 2020. A summary of the year-end MET balances since 2001 follows:

Yearly MET Account Balances	
2001	\$170,178
2002	\$188,734
2003	\$271,485
2004	\$290,150
2005	\$310,909
2006	\$372,528
2007	\$404,993
2008	\$299,652
2009	\$387,387
2010	\$419,188
2011	\$436,429
2012	\$495,032
2013	\$547,839
2014	\$549,756
2015	\$504,272
2016	\$648,935
2017	\$774,375
2018	\$706,044
2019	\$857,683
2020	\$1,043,461
2021	\$1,122,187

THE MEMORIAL ENDOWMENT TRUST

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2021 Grants

The MET is authorized to award grants to UUCS Teams or other recognized groups within the UUCS totaling up to 5% of the value of the assets in the MET Trust. Grants are not to be used for expenses normally covered by the operating budget of the UUCS. Finally, grants can only be made in a calendar year if the value of the MET, less any proposed grants, exceeds \$600,000 as of the preceding December 31.

Originally, the value of the MET Trust for purposes of grant distributions was determined by taking the average of its value on the last day of each month over the prior calendar year. Consistent with the terms of the Trust the MET Board decided, beginning in 2019, to value the Trust by taking the average of its value on the last day of each month over the prior 3 calendar years. This approach will provide a more consistent sum of money for grants each year.

In 2021, the MET awarded five different grants totaling \$34,300:

\$15,000 was awarded on behalf of UUCS Professional Staff and ARESA to create hybrid meeting/learning opportunities. Freeman Hall, Conference Room and Bernstein Room would all have technology upgrades.

\$11,800 was awarded on behalf of our Communications and Membership Teams as a marketing grant to help us secure funds to better reach those in the community that share our vision of transformation.

\$2,500 was awarded on behalf of the Worship Team to create a more visually appealing worship experience.

\$2,000 was awarded on behalf of the Building and Grounds and Communications Teams to bring our interior signs and banners in line with our new name and branding.

\$3,000 was awarded on behalf of CYRE and Family Ministry Team to create an outdoor gathering place (Fire Pit).

THE MEMORIAL ENDOWMENT TRUST

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2021 Revenues and Disbursements

A summary of the MET Revenue and Disbursements for 2021 is as follows:

<u>Revenue</u>		
2021 Income (Dividends and interest)		\$9,081.32
Contributions and bequests		\$52,073.24
Total Revenue		\$61,154.56
<u>Disbursements</u>		
Advisory fees (UUCEF)	(\$10,280.62)	
Trustees expenses (printing, stamps, insurance, etc.)	(\$11,315.82)	
Grants paid during 2021	(\$41,567.24)	
Total Disbursements		(\$63,163.68)
Excess of revenues over disbursements		\$2,009.12
Realized and Unrealized gains/losses in market value for 2021		\$80,734.14
Increase/Decrease in MET assets for 2021		\$78,725.02

Other Memorial Endowment Trust information:

On June 30, 2021, Joy Bruce and Mike Long completed their second terms as Trustees of the MET and Fred Dodson, MaryAnn Hendrick, and Ellen Holliday were appointed to the MET Board effective July 1, 2021. With her accounting knowledge and experience, MaryAnn has ably provided the necessary accounting expertise needed to manage the MET and its funds.

STEWARDSHIP

Annual Report 2021-2022

Submitted by Alesia Hutto, Staff Liaison

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The Stewardship Team for 2021-2022 is comprised of Franklin McClelland (chair), Erica Blake, John Burns, Elaine Camp, Chris Clark, Gwynne Movius, Mike O’Sullivan and Julie Smith with Kelly Greene, John Herrick and Alesia Hutto serving as staff liaisons. The canvassers include Lincoln Baxter, John Burns, Shelagh Gallagher, Ellen Holliday, Jane Kusterer, Debbie Marr, Cyndi Martinec, Franklin McClelland, Gwynne Movius, Mike O’Sullivan, Julie Smith, Jinny Sullivan and Paul Wilson.

The Stewardship Team encouraged generosity at the 5% level across the board through direct messaging in stewardship materials, peer-to-peer canvassing efforts, messaging through monthly stewardship captains who act as “cheerleaders” by offering testimony and encouraging financial commitment, through recorded and live monthly stewardship messages for Sunday services and regular notices in Currents. We thanked members who pledged with a letter from the congregation signed by the minister and stewardship team chair, and a handwritten thank you note was sent from the team and with a handmade craft from our CYRE youth to those who pledged generously.

The team continued to offer member appreciation events the Fall Back Festival, taking place on November 6. This event was well received with over 40 attendees. The Music and Stewardship teams planned a special event for the community made possible thanks to the generosity of UUCC member Larry Bennett. The Spring Soiree which took place on Sunday, April 3 was one of the first events held inside our Sanctuary at 234. The 7:00 p.m. concert by Charlotte Symphony Principal Flutist Victor Wang and Principal Harpist Andrea Mumm was preceded with a pre-concert reception at 6:15 p.m. in Freeman Hall. We had 80 attendees.

The strategy for the 2021-2022 congregational year has been to move the needle forward amongst those not considered our largest pledgers. Despite our best efforts, this year’s campaign has proven difficult given that members are not as engaged in the life of the Community as expected and the lingering effects of the pandemic. Monthly pledge response rates averaged 51%. One bright spot is that we have higher than expected New Member pledges totaling \$25,000. In summary, existing pledges are down, but that reduction is offset by new member pledges which equates to a total loss over last year of \$66,000 compared to last year’s pledge total as of May 15.

The team tried to increase engagement with the campaign through intentional messaging, new marketing tools, creative thank yous and celebrating. We created ad hoc groups within the team that focused on doing just that. The messaging group worked on intentional language varying monthly with the hopes to encourage members to be more attentive to our pleas. The marketing group has been seeking creative ways to push these messages. Some of the marketing efforts included texting, monthly videos and a “Share the Plate” campaign. We will continue to partner with CYRE to include tokens of thanks with thank you cards and celebrate with the community through member appreciation events.

STEWARDSHIP

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The Team began its "Share the Plate" initiative in February with a soft roll out on February 13. These ongoing monthly campaigns stipulate that we share half of our contributions (not payments on pledges) with organizations creating positive change in the broader community. The first organization we partnered with was Black Lives of Unitarian Universalist (BLUU) and the second was GreenFaith. We were able to raise \$1583 for BLUU and \$1153 for GreenFaith. We will continue to identify opportunities in the coming months and make connections between the UUCC and organizations who share our passion for justice and transformation.

In the month of June, the stewardship team will look at the work of year-round pledging and have a discussion around what is working and what is not. We will use that information to help shape our work going forward.

OPEN DOOR SCHOOL (ODS)

Annual Report 2021-2022

Submitted by Sheila Locklear, Director

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Overview:

Open Door School is an outreach program of the Unitarian Universalist Committee of Charlotte (UUCC), the (ODS) resides in the CYRE wing of the UUCC building during the week. The school relies on the active support of parents for their time, talents, and fundraising contributions. This year marks Open Door School's 56th year of Progressive Education with Sheila Locklear as school Director.

This Year:

- Open Door School was able to open on schedule in September even though we were facing the Covid 19 Virus. We were able to operate with very few changes in our day to routine. Classes were held outside as often as possible. ODS was fully staffed with sixteen staff members including a support floater. We continued to follow our Covid Safety Plan which included vaccinated staff, only UUCC and ODS staff allowed in the building and following the CDC guidelines which included everyone wearing masks while the mandate was in effect. As the CDC relaxed their restriction UUCC and ODS followed by not requiring masks and gradually allow the public into the building (ODS is still requiring an appointment to better protect our children and staff).
- The end of year enrollment 93% in 7 classroom which is our standard number of classes.
- The ODS scholarship fund awarded \$11989. during the school year, distributed between 7 children
- In preparation for the 2021-2022's school year, registration was held in January 2021,
- In addition to the \$5706. Raised from the online Silent Auction, ODS held a Fundraising Campaign that raised \$1200 and the UUCC Met Grant match up to \$10,000. Which allowed us to transfer \$1500 to our Sue Riley Scholarship Fund.
- Major fundraising efforts include (*this school year due to Covid*)
 - Harris Teeter Together in Education (ongoing)
 - Spirt wear sales (fall)
 - Online Silent Auction
- A financial agreement of fair share between the school and the church resulted in ODS paying the church (approximately) \$22,053 for the year, in monthly installments.

School Makeup:

ODS is comprised of one full-day, multi-age licensed (Five Star) classroom and six half-day preschool classes. We have children with diagnosed special needs/conditions and estimated twelve children from diverse ethnic backgrounds. There are bilingual or multilingual children enrolled in each of our classroom. Families travel from twenty-two different zip codes to attend Open Door School.

OPEN DOOR SCHOOL (ODS)

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Community Outreach:

- The following *drives were canceled due* to Covid Restrictions.
 - Books for Promising Pages
 - Canned goods for Loaves & Fishes
- We were able to hold our annual Coat Drive in February and our Kindergarten Readiness Parent Education in May.

Parent Education:

The Adult Education forums offered by Family Community Association were canceled due to Covid restrictions and replaced by a video that was developed by Suzy Moore, Office Manager and Nadia Salem a Full Day teacher of ODS and the School Director, Sheila Locklear.

Maintenance:

- Ongoing minor repairs as needed and ongoing care of the ODS garden. Sheds were repair by the Grounds and Building Committee this year.
- Playground fences and wooden equipment were pressured washed by a contracted vendor in April.

Monthly Happenings:

- ODS Staff, FCA, and Managing Team Meetings were held mainly with one retreat meeting in March via Zoom this year.

June/July:

- Summer form packet were prepared and sent out.
- Summer Camp was held and enrollment was full.

August:

- The annual ODS Beautification Day was canceled this school year due to Covid restrictions.
- Annual parent Orientation *was done through video and phone* conversation for New and returning families.

September: The following events cancelled this year:

- Our Potluck
- Classroom visits but families (while wearing mask) were able to observe from the fence of each playground as their children visited with their teachers again this school year.
- Our FCA Meets and Greet for new families.
- Orientation Meeting

OPEN DOOR SCHOOL (ODS)

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October: Also Cancelled:

- Free Speech and Hearing Screenings through Speech Center
- Curriculum Nights
- Adult Education event: A video link to a workshop (Suzy Moore, Sheila Locklear, and Nadia Salem) was by the office posted on social media and newsletters

November:

- Part One of “Rising K” adult education event for parents of rising Kindergarteners but held online
- Annual Harvest Bake Sale before and after services at UUCC was held in person this year.
- Morning “Parent Coffee” hosted by the FCA was cancelled

December:

- Classroom Winter Potluck luncheons were held outside on the playgrounds.
- Coat Drive for Title One school

January:

- In-house Registration for the 2020-2021 school year for currently enrolled families was held.
- Promising Pages book *drive was canceled*.
- Children’s Theatre brought their preschool show was *canceled this year*.

February:

- Annual Open House for 2021-2022 school year *was canceled but replaced by a video and information on our website and social media*.
- Morning “Parent Coffee” hosted by the FCA *was canceled*.

March:

- General Registration was held
- Class Placements were announced
- Food Drive *was canceled* for Loaves and Fishes
- The Silent Auction fundraiser was held online.

April:

- FCA are recruiting for members for the upcoming school year
- Annual Spring Festival *was not* held again this year due to Covid.
- Founders Day was celebrated, and the children had their annual parade around the traffic circle
- Class photos *were not* taken by ODS teacher and professional photographer, Suzy Moore

OPEN DOOR SCHOOL (ODS)

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May:

- End-of-Year family surveys will be collected by the Managing Team via Survey Monkey
- End-of-year Classroom Ice Cream Parties held on the playgrounds
- Staff Cleaning Week

The Progressive Philosophy is still being practice at Open Door School in honor of our Sue Riley's model of best practices for Young Children. It is our goal to make sure the ODS experience is available to all children and families from all walks of life in the future. Enrollment for the upcoming 2022-2023 is looking to be 99% or above, with most classes having lengthy waiting lists again this year.