



Unitarian Universalist
Community of Charlotte

ANNUAL REPORT 2022-2023

Unitarian Universalist Community of Charlotte
234 North Sharon Amity Road
Charlotte, North Carolina 28211
(704) 366-8623 Phone
(704) 366-8812 Fax
www.uuccharlotte.org
uucc@uuccharlotte.org

TABLE OF CONTENTS

<u>IN MEMORIAM</u>	2
<u>STAFF AND LEADERSHIP DIRECTORY</u>	3
<u>BOARD OF TRUSTEES INFORMATION</u>	5
BOARD CO-CHAIR REPORT AND REPORT OF POLICY	6
<u>SPIRITUAL DEVELOPMENT AND ADULT PROGRAMMING</u>	
<u>MINISTER'S REPORT</u>	13
ADULT RELIGIOUS EDUCATION AND SPIRITUAL DEVELOPMENT	16
CHILDREN AND YOUTH RELIGIOUS EDUCATION (CYRE)	19
COMMUNITY BUILDING	22
COMMUNITY SUNDAYS	23
CONGREGATIONAL CARE	24
DENOMINATIONAL RELATIONS	26
INTERIM MINISTRY TRANSITION	27
INTERSECTIONAL JUSTICE TEAM AND ENGAGEMENT GROUP	29
MEMBERSHIP	31
MUSIC	33
WORSHIP	35
<u>ADMINISTRATION</u>	
<u>DIRECTOR OF ADMINISTRATION'S REPORT</u>	37
BUILDING AND GROUNDS	40
COMMUNICATIONS	42
FINANCE	43
MEMORIAL ENDOWMENT TRUST 2022 ANNUAL REPORT	45
STEWARDSHIP	52
<u>OPEN DOOR SCHOOL</u>	53

IN MEMORIAM

May 13, 2022 – May 17, 2023

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.

* * *

Anne Carpenter

Chris Clark

Brenda Dillon

Donald Freund

Fred Hutchinson

Ignacy Kuczminski

Tawana Wilson-Allen

Ann Wood

* * *

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 five full-time and five 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. Lisa Bovee-Kemper <i>Interim Minister</i>	(704) 366-8623 ext. 6032	lisa@uuccharlotte.org
Linn Martin <i>Adult Education and Spiritual Development Coordinator</i>		aresd@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
---	-----------------------------	--

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 2022-2023 please see their corresponding reports.

Spiritual Development and Programming Teams

Adult Religious Education and Spiritual Development (ARESD)	Linn Martin <i>Chair</i>	Lisa Bovee-Kemper <i>Staff Liaison</i>
Children and Youth Religious Education	Kendra Dixon and Melissa Schropp <i>Co-Chairs</i>	Belinda Parry <i>Staff Liaison</i>
Community Building		Kelly Greene <i>Staff Liaison</i>
Congregational Care	Sheila Lay <i>Chair</i>	Kelly Greene <i>Staff Liaison</i>
Denominational Relations		Kelly Greene <i>Staff Liaison</i>
Interim Ministry Transition		Lisa Bovee-Kemper <i>Staff Liaison</i>
Intersectional Justice		Lisa Bovee-Kemper <i>Staff Liaison</i>
Membership		Kelly Greene <i>Staff Liaison</i>
Worship		Lisa Bovee-Kemper <i>Staff Liaison</i>

Administrative Teams

Building and Grounds	Charles Pilkey <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
Communications		Belinda Parry <i>Staff Liaison</i>
Finance	Melissa Vullo <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
Memorial Endowment Trust	Tom Nunnenkamp <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
Stewardship		Kelly Greene, John Herrick, & Alesia Hutto <i>Staff Liaisons</i>

Music

Music		John Herrick <i>Staff Liaison</i>
-------	--	--------------------------------------

Open Door School (ODS)

ODS Managing Team	Elaine Peed & Jim Van Fleet <i>Co-Chairs</i>	Alesia Hutto <i>Staff Liaison</i>
-------------------	---	--------------------------------------

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 Minister 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 the Team's monthly report to the Board, delivered at each of the monthly Board meetings, as well as through less formal conversations and email exchanges. The Board meetings generally take place the third Tuesday of each month at 6:30 p.m. via Zoom or using a hybrid connection from the Bernstein 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 2022-2023 Board of Trustees are:

Kurt Merkle

Co-Chair

Paul Wilson

Co-Chair

Ben Baxter

Trustee at Large

Michael Amy Cira Rodriguez

Trustee at Large

Lisa Hagen

Clerk

Laurie Reed

Trustee-at-Large

Shannon Maples

Trustee at Large

Samantha Visco

Trustee at Large

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Record of policy and significant action taken by the UUCC Board of Trustees
from July 2022 – May 2023

Submitted by Kurt Merkle and Paul Wilson, Co-Chairs, Board of Trustees

Page 1 of 7

Introduction

After the uproar of the previous congregational year, with its pair of ministerial resignations and the unexpected but vital work needed to find and appoint an interim minister, the Board regrouped in July and August of 2022, expecting that this year's tasks would be extremely important for the UUCC but perhaps carried on at a more reasonable pace than before. But the previous year's major changes were, it turned out, only the beginning of a more complex transitional process in 2022-23. Our interim minister, Rev. Lisa Bovee-Kemper, arrived in August and immediately began her work of guiding the UUCC through this interim year as the preparation for a search the following year for a new settled minister.

A number of events fairly early in the congregational year created unforeseeable obstacles and slowed down the interim work. First, Susan McClelland resigned from the Board in July. The Board appointed Jolena James-Szanton as Susan's replacement for the two years remaining on her term. Then, most tragically, our new Board member Chris Clark died suddenly in August. This was a terrible shock to everyone on the Board and in the Congregation, and especially, of course, to Denise Weldon-Clark, as she and Chris had been married quite recently. The Board continues to offer, as best it can, its love and support to Denise. To replace Chris, the Board appointed Shannon Maples to serve the full three years of Chris's term. Finally, in late March of 2023 Jolena decided that she could no longer serve on the Board or remain in the congregation. The Board appointed Gwynne Movius to serve the remaining year of Jolena's term. All these appointments are subject to approval by the Congregation at the annual meeting on June 4, 2023. At that meeting we will vote to approve the one-year term for Gwynne and the two-year term for Shannon, as well as electing three new Board members to replace Lisa Hagen, Sam Visco, and Paul Wilson, whose three-year terms expire in June. The results of those votes will appear in the minutes for the annual meeting.

The Board wants to acknowledge the wonderful and absolutely indispensable support we have received from the Staff and from many members of the Congregation, who have supplied all kinds of needed information and work through this evolving range of circumstances. They have demonstrated, day by day and through the year, the strength, energy, and insight that make the UUCC such a valuable and satisfying spiritual home for all of us.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Page 2 of 7

General Organization of the Board

The 2022-2023 Board included the following members: Kurt Merkle, Paul Wilson, Ben Baxter, Michael Amy Cira, Chris Clark, Lisa Hagen, Shannon Maples, Susan McClelland, Laurie Reed, and Samantha Visco. The Coordinating Team of Lisa Bovee-Kemper (Interim Minister), Kelly Greene (Director of Member Relations), 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.

Each meeting of the UCC Board of Trustees begins with chalice-lighting words and readings of the leadership covenant and the UCC mission and vision statements. Agenda items routinely include a review of the Coordinating Team Report, which provides an update on membership, a current financial report, a 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 working through discussions with the Congregation regarding the nature and goals of our Community. Below are highlights from regularly scheduled Board meetings of the 2022-2023 congregational year. The minutes of each Board meeting are available on the UCC website.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Page 3 of 7

Record of policy and significant actions taken by the UUCB Board of Trustees from July 2022 to April 2023

July 2022

The Board offered final thanks and accolades to Jay and Alesia on the turn of the congregational year; Jay provided “final thoughts” to the Board.

The Board and CT began planning welcome celebrations for Rev. Lisa: a Freeman Hall reception on August 7 and a larger celebration later in the autumn.

The Board began discussion of bylaws changes needed to improve procedures for electing new members, so as to eliminate nominations from the floor and put a secret ballot in place.

Michael raised the possibility of doing a “land acknowledgement” as part of the opening section of Board meetings.

August 2022

Changes in responsibilities and personnel for the Board and CT: Kelly joined the CT as full-time staff and Director of Member Relations. Susan McLelland resigned from the Board and her family left the UUCB. The Board appointed Jolena James-Szanton to complete the remaining two years of Susan’s term on the Board, subject to the approval of the Congregation at the Annual Meeting.

As part of a revamping of our pledging and stewardship process, the Stewardship Team instituted a change from monthly pledging and payment to a quarterly scheme, with three three-month seasons, fall, winter, and spring. Under this plan, each canvasser reaches out to three households in each season; the plan includes a seasonal potluck party and a single pledge date midway through the season.

The Board appointed Shannon Maples to fill Chris Clark’s position on the Board. Shannon will serve the three years remaining on Chris’s term, subject to approval by the congregation at the Annual Meeting on June 4, 2023.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Page 4 of 7

September 2022

The Board worked on implementing the Covenant of Right Relations, doing research on measures taken by other congregations to find an administrative process that would be as effective, welcoming, and just as possible.

The first draft of the revisions to Article V, Section 6 of our bylaws was almost complete, but some aspects needed further consideration of possible problematic circumstances (tie votes, etc.).

Rev. Lisa described the Board's role in the interim process as most importantly one of clarifying, editing, and communicating our governing policies among ourselves and to the Congregation.

October 2022

The Board discussed the proposed Eighth Principle, which had been a central issue of the previous year, during which Jay and Eve had presented learning sessions and discussions devoted to making clear the reasons for considering the principle. This year, discussions of the Eighth Principle continued but took on new intensity, due to the ongoing review of Article II of the UUA Bylaws, which might result in significant changes when the revisions are formally proposed to the UUA General Assembly in June of 2023.

The Board did more work on the wording of the UUCC Bylaws, Article V, Section 6. Another draft was planned for the next meeting.

The Board once again discussed the implementation of the Right Relations Covenant, hoping to be taken at the next meeting.

November 2022

The Board engaged in long discussions of several complex issues: revisions of the Bylaws governing the election of new Board members; policy governance and its relationship to responsibility for decision-making authority shared between Board and Staff; the best approach to implementing the Covenant of Right Relations. None of these discussions produced a stable agreement or decision.

Planning began on a Board/Staff retreat to be held in December, in hopes of working out some larger issues of relationship and responsibility within the Board, the discussion to be guided by a moderator from outside the UUCC.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Page 5 of 7

The Board agreed that we should work harder at regular communication with the congregation. Paul wrote a description, to be placed in Currents, of the present state of the transition process.

December 2022

The Board approved an expenditure from the Reserve of \$1,800 to pay for the installation of new call boxes at the two main entrances of 234 N. Sharon Amity.

The Board engaged in a long discussion on the concept of “restorative justice” and how that might become an integral part of our work on implementing the Covenant of Right Relations. Several Board members requested some time to do research on the concept.

Planning for the proposed retreat continued, with tentative suggestions as to location and the character of the event (a meal in a venue outside of 234).

January 2023

Members of the Transition Team (John Burns and Melissa Vullo) gave a presentation to the Board on the present state of the interim process and plans for connecting with the Congregation to help with the search for a settled minister.

The staff carried out the standard purge of non-participating members. Twenty-five pledging members were removed from the membership rolls, as per the Bylaws.

The Board approved an official connection with the local League of Women’s Voters, as part of the latter’s voter-registration efforts.

The Board approved the proposed changes to Article V, Section 6 of the UUCC’s Bylaws, in anticipation of a special meeting of the Congregation to approve the changes.

The Board continued planning and discussion for a retreat on Saturday, January 28, and that retreat took place, centered on discussions of covenant and our Leadership Covenant Statement.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Page 6 of 7

February 2023

The Board approved Kelly's plans for a) the selection of UUA General Assembly delegates and b) the allocation of UUCC votes with regard to approval of the proposed revisions for Article II of the UUA Bylaws.

The CT reported that the search for a new Lifespan Director of Religious Education has begun, with plans for hiring that person in late spring and a start date of July or early August for the position.

The long-awaited special meeting for approval of the UUCC Bylaws revisions took place on February 26, and the vote was 123 for, 1 against.

March 2023

The Transition Team gave a report to the Board on the principal concerns and views of congregation members as we approach the beginning of the settled-minister search, proposed to take place in the coming year.

Planning began for the celebration of the UUCC's 75th Anniversary, 1947 to 2022. The Planning Committee selected the weekend of April 29 and 30 as the dates for a late-afternoon party and entertainment presentation on Saturday and a special service on Sunday morning.

The Board made plans to complete a report, six months in, of the interim-ministry process, in accordance with UUA procedures. The UUA supplied a questionnaire, to which Rev. Lisa, members of the Board, and members of the Transition Team contributed responses. Rev. Lisa then created a more concise narrative description of the assessment, for presentation to the congregation at a town-hall meeting on May 21.

April 2023

The Board nominated and appointed two recruiting teams, one of three members to create a list of candidates to serve as new members of the Board, the other of four members to create a search committee to manage the search for a settled minister which most of us hope will begin in August of 2023. Members of the Board recruiting team are Susan Cox, Megan Van Fleet, and Margie Storch. Members of the search-committee recruiting team are Kendra Dixon, Carol Gay, Nathan Hackenberg, and Rita Heath-Singer.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Page 7 of 7

The 75th Anniversary JUUbilee Celebration events were very joyous and satisfying, with a lot of fun games, good food, warm reminiscences of Follies and other blasts from the past on Saturday, plus a moving and thoughtful celebratory service on Sunday.

Summary for the end of the year

The end of this congregational year finds us all, Board, Congregation, Ministry, and Staff, with a lot to congratulate ourselves about, but with a lot of hard work and difficult choices ahead. Despite the afflictions and delays at the beginning of the year, we have cooperatively managed to carry on with the interim-ministry process, and before year's end Rev. Lisa will present a report and lead a town-hall discussion that we hope will make clear to all interested congregation members what we are trying to do in the coming year as regards the choosing and calling of a new settled minister. On the Board's part this will require important work in clarifying our governing policies and the interaction between our stated Ends and the Means we adopt to achieve them.

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,
Kurt Merkle and Paul Wilson, Co-Chairs, UUCB Board of Trustees

MINISTER'S REPORT

Annual Report 2022-2023

Submitted by Rev. Lisa Bovee-Kemper, Interim Minister

Page 1 of 3

As I reviewed previous annual reports in order to get a sense of the overall style of such reports here at UCC, I was again struck by the absolutely massive amount of change and upheaval that this community has experienced over the past three years. It may seem like old news, but it really is not. It takes years for individuals and systems to fully process and integrate simple changes, let alone such complex and multi-layered ones.

The first thing one thinks of is the COVID-19 pandemic – well known to have had far-reaching impacts on congregations everywhere. However, in the midst of that collective experience of challenge, UCC experienced its own series of expected and unexpected changes, most notably the turnover of many long-tenured staff.

Without belaboring the details, I will note that there is a significant difference between the changes of 2020-22 and those in 2022-23. The former were largely out of your control and you had to build the path as you were traveling it. The interim period is different because not only are you doing it on purpose, but also there is a broad and deep well of resources and experiences that we are drawing from. You have done good work this year, and I look forward to continuing to build on it in the year to come.

Before I begin the retrospective section of this report, I want to acknowledge the skill, experience, and commitment of UCC's professional staff, Alesia Hutto, Belinda Parry, Kelly Greene, and John Herrick. They, along with Tom Moore, Linn Martin, Melissa Schropp, and Lisa Walls, keep this place running smoothly, and I am lucky to get to work with such a terrific group of people.

The month of July was focused on saying goodbye to Rev. Jay Leach, your minister of nearly two decades. It was important to take the time to do that well, and I believe that you did. When I arrived August 1, it was a quick turnaround – especially for staff – and we have seen some challenges come out of that. Nonetheless, the interim ministry got off to a strong start and I remain grateful for your warm welcome to me and my family. We chose the theme of "Cultivating Courageous Connections" for this congregational year.

In that first month, two deaths within weeks of one another meant planning and executing two memorial services in close succession and that we moved together immediately into a space of grief and loss – before we had gotten to know one another very well at all. It is an honor and a privilege to walk with a family or a congregation in times of sadness, and I am grateful for the grace you gave me and the relationships we were able to build through that process.

MINISTER'S REPORT

Page 2 of 3

As the fall continued, we continued to build relationships as I focused on joining the system, gathering information, and doing my part to keep the congregation moving forward, most notably planning and executing the Sunday worship services. Notably in December, we made a choice to bring a spirit of joy and celebration into our time together, and I'm grateful to John and our musicians for presenting the holiday music service in addition to the usual holiday commitments.

In 2023, I took over the staff liaison role for Intersectional Justice, and the Transition Team engaged the congregation in both an exploration of your history timeline and a series of listening sessions to collect information from stakeholders (that's y'all!). We also tried a new thing on third Sundays, Community Sunday, which so far has been a great success, engaging all ages in spiritual deepening. Gratitude to Kelly Greene for pitching the idea and playing such a big role in organizing.

Throughout the year we have engaged in ongoing conversation in small and larger groups about the proposed revisions to Article II of the UUA bylaws, which is an active process within the larger denomination. That work continues with the Wellspring course on Article II being offered as we speak.

The Director of Lifespan Search was certainly a highlight of the year for me. With a thoughtful and engaged search team and a pool of very strong candidates for the position, the search was a wonderful opportunity to imagine possible futures and begin to look forward to the addition of an essential member of the staff team.

Both the intersectional justice and denominational relations teams have been exploring ways to engage more deeply our relationships with and resources available from the greater Unitarian Universalist Association, including regional staff, which I have strongly encouraged. As an interim minister, I regularly interface with denominational offices such as Church Staff Finances, Transitions, and regional staff, as well as those like Side with Love which support our social justice work. I have found that maintaining those denominational connections has countless benefits in congregational life, including building stronger UU identity in individual members of the congregation.

Late in April I introduced the concept of shared ministry, which is a leadership model that brings the minister, the lay leadership, and congregational volunteers together to work collaboratively toward a common vision and set of goals. Shared ministry is a model that will help you as a community to become more vibrant and engaged in the things that are important to you. It is also more sustainable over the long term – especially if we use the remaining interim period to get really clear on the roles, responsibilities, and accountability relationships in this community, and to practice open communication and curiosity.

MINISTER'S REPORT

Page 3 of 3

With that in mind, I hope that in the year to come, you will join me in leaning into and exploring your Mission, Vision, and Ends, as we engage with the words you have used to describe yourselves. The best path to finding a great match in the search for a settled minister is to get really clear on who you are as a community, and where you want to go next.

As the pollen flies and the snakes spawn in my backyard, I'm looking forward to sharing with y'all some favorite end of the year milestones like the flower ceremony and the youth bridging service, attending General Assembly, and taking some time in July to rest and spend time with my family (and clean the garage!). And after that, I look forward to jumping into late summer and early fall with renewed energy, ready to build new relationships and try new, creative things!

With Gratitude and Love,
Lisa

*For detailed information on the interim process, please refer to the Interim Assessments.

ADULT EDUCATION / SPIRITUAL DEVELOPMENT

Annual Report 2022-2023

Submitted by Linn Martin, Programming Coordinator

Page 1 of 3

The Adult Education and Spiritual Development (AE/SD) Team for this program year was comprised of Althea Clark, Cyndi Martinec, Kristin Rogentine Lee, and Caroline Webber; halfway through the year Ron Spake volunteered and was a welcome addition to the team. Linn Martin was the Program Coordinator, under the guidance of Rev. Lisa Bovee-Kemper. The newly formed team met weekly during the month of August to define its mission and set its goals for the year. A community-wide interest survey was conducted in early September, and though response numbers seemed low, the clear “winners” were (1) spiritual development, (2) racial equity, (3) environmental issues, and (4) art/film/music. An overview of AE/SD 2022-23 program offerings follows.

Rev. Lisa presented a two-part series entitled “The Big Questions,” which afforded attendees an opportunity to meet with our new interim minister and get a sense of her own spirituality as well as share their own thoughts about many difficult life questions. Rev. Lisa also led an uplifting group exchange following a viewing of *Happy: The Movie*.

AE/SD sponsored a four-part movie series which addressed the need for climate change action and introduced GreenFaith International to the UUCU community. These sessions resulted in the formation of a UUCU GreenFaith Circle. In January a formal decision was made to transition the GreenFaith Circle movement to the Intersectional Justice Team; however, the AE/SD team is proud of its successful efforts to launch this incredibly important movement community wide.

AE/SD sponsored this year’s Unitarian Universalist Association Common Read, *Mistakes and Miracles: Congregations on the Road to Multiculturalism* (Skinner House Books, 2019). Kelly Greene and Rev. Lisa led a four-part discussion series on Zoom. The book and program were developed to build community within UU congregations and their movement by giving a shared platform for reflection and a shared focus for action.

We had the opportunity to offer a presentation by author Dr. H.D. Kirkpatrick and De Kirkpatrick, distant cousins and Charlotte locals, who presented a fascinating true story concerning the psychology of the two men and the history of their great-great-grandparents as slave master and slave during the antebellum period. Attendance for this program was outstanding even though it was a last-minute event between Christmas and New Year holidays. (Dr. Kirkpatrick’s book is entitled *Marse, A Psychological Portrait of the Southern Slave Master and His Legacy of White Supremacy*.)

ADULT EDUCATION / SPIRITUAL DEVELOPMENT

Page 2 of 3

Introduction to Tai Chi was a martial arts series led by the husband of team member Kristin Rogentine Lee. The turnout was small, but participants were enthusiastic, and the instructor, Charles Lee, has offered to lead another series.

In the spring our members Lincoln Baxter and Loyd Dillon narrated the six-part video series entitled, "Long, Strange Trip," a history of Unitarian Universalism. Loyd shared his amazing archives and historical stories and wit, much to the enjoyment of the group. Turnout was excellent for the entire six sessions and was clearly much appreciated by those who attended.

Upcoming Programs:

Mid-May the team is overseeing a Zoom-only workshop led by Karen Bringle and Michael Amy Cira. This is a four-part program purchased from UU Wellspring to present a deep dive into UUA's Proposed Article II bylaw amendment prior to a vote at this year's GA.

In early June we will have a Friday Night at the Movies presentation of the movie *Pride*, a comedy-drama film cited in a sermon by guest minister, Kayla Parker last March. Former AE/SD team member Bob Gorman will facilitate the film presentation.

Monthly Credo presentations are without question AE/SD's most well-attended presentations. This year we were gifted with a new volunteer leader, Barbara Devinney. She has done a fantastic job of organizing the logistics and lining up a wide variety of extremely interesting presenters: Greg Schropp, Rocky Hendrick, Mike Raible, Paul Turner, Beth Mussay, Mary Bruce, and still to come, Joe Spencer.

Barbara has said she "is open to transitioning Credo coordination at any time someone expresses an interest," and if needed, she is "willing to continue in this role for a time, to assist with transitions in staffing;" however, she also said "the AE/SD team or staff should definitely look to January 2024 as a great time to change and June 2024 as the absolute final date" she will commit.

Discovery Circles historically have fallen under the Small Group Ministry Steering Team, but AE/SD was asked to carry on this program in the absence of a team/leader. We were able to line up four facilitators to lead two in-person groups for monthly meetings throughout the 2022-23. The Circles' service projects this year will be to sort clothing for Compassion Circle, one of our Share the Plate organizations.

For many years Camilla Mazzotta has shared her talents to develop the monthly Circle discussions. She has expressed her willingness to share her long-time knowledge with the incoming Lifespan Religious Education Director if she is interested in carrying on the program or some derivative of it.

ADULT EDUCATION / SPIRITUAL DEVELOPMENT

Page 3 of 3

AE/SD is the umbrella team for a number of UUCC's Affinity Groups. Currently the existing groups are Religious Humanism, Jabberwocks poetry group, Lotus Path meditation, and the Open Mind Book Club. Added to the mix this spring was a resurrection of the Writing Your Spiritual Journey group, which had folded due to COVID-19. Except for Lotus Path, which meets weekly, all groups meet monthly either in person or on Zoom.

In summary, the Adult Education & Spiritual Development Team was successful in its endeavors to hear and respond to our community's concerns and interests. By keeping a focus toward the four priorities identified in our survey (spiritual development, racial equity, environmental issues, and art/film/music), we were able to offer a wide variety of programs that engaged a broad expanse of the adult population of UUCC in both educational and spiritual development opportunities.

RELIGIOUS EDUCATION FOR CHILDREN AND YOUTH

Annual Report 2022-2023

Submitted by Melissa Schropp, Program Co-Coordinator

Page 1 of 3

This year's Children and Youth Religious Education (CYRE) Team was Joe Argent, Kendra Dixon (Co-Chair), David Flynn, Nathan Hackenberg, Janan Jones, Kristie Lauderbaugh, Heather Simpson, Melissa Schropp (Co-Chair), Valerie Vickers, and Lisa Walls

When the second search for a Director of Lifespan Religious Education did not yield any suitable candidates, the decision was made to continue the contracts for two of the coordinators from the 2021-22 programming year to continue managing the program for 2022-23. Melissa Schropp and Lisa Walls signed on to continue as the CYRE co-coordinators through June 2023.

We offered Sunday programming for five age groups:

- Nursery (infant – 3 yrs),
- SpiritPlay (4yrs – 1st grade),
- Elementary (2nd – 5th grade),
- Middle School (6th – 8th grade) and
- High School (9-12th grade).

The Nursery, which was rarely utilized the prior year, has seen regular attendance this year of 2-3 children each week, with occasionally more. Our nursery staff wear facial masks at all times.

Our SpiritPlay class continued to meet outdoors as weather permitted, which was the preference of the teaching team and helped keep everyone in the fresh air with COVID-19 still circulating. We averaged about 7-8 kids each week.

Elementary classes also saw quite regular weekly attendance—between 8-10 kids. With the challenge of finding enough teachers to field a team of 4 for each class, and since the enrollment was less since the pandemic, we decided to combine our elementary classes, which had formerly been two separate classes, a 2nd/3rd and a 4th/5th class, into one. We were still a teacher short of a full team for most of the year, as someone dropped out due to health reasons. The curriculum focus this year for elementary was on World Religions. The stories selected for SpiritPlay had their sources from various faiths, which generally correlated with the other faiths that the elementary class was learning about. The elementary class also took several field trips to visit other houses of worship—including a Catholic mass, Jewish Shabbat, an Islamic Mosque, and a Hindu temple. Our kids were well behaved and enjoyed experiencing other faith traditions!

RELIGIOUS EDUCATION FOR CHILDREN AND YOUTH

Page 2 of 3

The middle school and high school classes both utilized existing curriculums based on *The Simpsons* animated TV show—which had been a favorite offering in past years and so we hoped would be a draw for the youth.

Our middle school class was a bright spot through this year—especially after being one of our more struggling classes as far as attendance the prior year. We've had great attendance and an eager and enthusiastic group. They traveled to Davidson College in October for a low ropes team-building event. They also prepared two Pancake Breakfast for the congregation in the Fall and Spring—a joint effort with the High school youth, but since high school participation was weak, it fell largely on the middle schoolers and they showed up in the best way! They were well attended and the funds raised went toward our Coming of Age program—though this year was an off-year for that offering, the funds will be available for when it's next offered. Middle school youth planned a Sunday service which they presented in March, and they did an amazing job! They have also met monthly on a Friday evening for various planned events through our Middle School Youth Group (MYSG) which has included bowling, an escape room, and a community service project, among other fun outings.

Our high school class was plagued with very low attendance throughout the year, and so was rather loose about the curriculum—often just a casual check-in and discussion driven by the youth, rather than watching/discussing a *Simpsons* episode. High school youth led a service in November, which went well and was a high point.

We were able to offer Our Whole Lives (OWL) sexuality education for three age groups this year—a senior high class over two weekends in the fall, and a 5th- 6th and an 8th-9th class that both met Sunday afternoons for 8 weeks beginning in January. We paid for two UUCU members to get trained/certified as OWL facilitators for the younger ages. We had groups across all ages attend the youth Mountain Cons at The Mountain Retreat and Learning Center that were offered in both late Fall of 2022 and early spring of 2023, accompanied by adult advisors from the congregation (usually parents).

We attempted to revive our cross-generational “February Friends” event, but unfortunately did not generate enough interest/sign ups to make it happen and so had to cancel. Ironically, we had adults sign up but didn't have enough kids to match up! Perhaps there will be better energy around this next year.

In our last CYRE Team meeting, we discussed possible recipients of the Roger Atkins Exceptional Volunteer Award for CYRE. After taking into account folks who have received this award previously, and also the fact that people on the CYRE team are not eligible, we opted to not extend this award for the 2022-23 year. While we deeply appreciate all our volunteers, we didn't see any clear contenders for

RELIGIOUS EDUCATION FOR CHILDREN AND YOUTH

Page 3 of 3

“above and beyond.” It was noted that there have been other years when this award was not given, and we felt that we didn't want the meaning of this award to be watered down.

With the addition of the “First 15” on first Sundays, Community Sunday on third Sundays, and some other multigenerational services this spring, we had a few less programming Sundays than originally planned. We have found the Community Sundays have been well-received by our families! It has been good to find more opportunities to welcome children into our services.

Overall, we had more successes than disappointments, and are in planning for summer activities. And with the recent success of our search for a new Director of Lifespan Religious Education, it feels like we are headed in the right direction!

COMMUNITY BUILDING

Annual Report 2022-023

Submitted by Kelly Greene, Staff Liaison

Page 1 of 1

The Community Building Team this year was John Burns, Althea Clark, Jeannie Fennell, Justine Busto, Sue Hill, Lisa Marie Nisely and Denise Weldon-Clark.

This team embraced the mission of helping connect people and spark joy at UUCC. What was the Family Ministry Team became a part of Community Building. The new group was more intentional about making offerings intergenerational. This was our first year fully back in person after the pandemic and we tried to make the most of the ability to gather.

Some events took place on the UUCC grounds (plant swap, Book/game/puzzle swap, Trunk or Treat, 75th Anniversary Celebration games). Some were outings (Bloom Festival, Juneteenth Festival, Charlotte Pride Festival and Parade, MLK Unity March and Wreath-Laying, Lunch Bunch at Koishi, Lunch Around the World, Open Tables at Muslim Community Center). Others took place in our building (potluck with Music Team's movie showing, Thanksgiving potluck, Crafts with Santa, Christmas Eve cookie reception, Game Night, Chili Cookoff). Adding features such as trivia and people bingo nudged participants to interact with each other more.

We tried new offerings (book/game/puzzle swap) and continued some old traditions (Charlotte Pride). We will continue to look for whatever will work to build strong, healthy connections at UUCC.

Our Affinity Groups remain a strong point of connection for members and an important way newcomers get to know us. In fact, some newcomers participate in Affinity Groups before they ever come to service. Current Affinity Groups include: UUCC Gamers (new this year), "Cold Reads" Play Group (closed), (dis)Abled Support and Advocacy Group, Hiking Group, Seniors Sharing, Happy Wanderers.

COMMUNITY SUNDAYS

Annual Report 2022-023
Submitted by Kelly Greene
Page 1 of 1

The Community Sundays Planning Group is John Burns, Lisa Marie Nisely, Janan Jones, David Flynn, John Herrick, Lisa Bovee-Kemper, Kelly Greene.

In January, Director of Member Relations Kelly Greene learned of an alternative way of doing Sunday mornings that was shared by colleague Jen Gill at UU Fellowship of Redwood City. "Action Sundays" were explained as intergenerational, interactive activities that followed abbreviated worship services – and brought young families to church. Kelly shared this idea with staff, the Membership Team, Worship Team, Children and Youth Religious Education Team, Community Building Team. From those teams, people volunteered to become part of the group that would begin planning what we would call Community Sundays.

The goal is that once per month on Sunday morning, we have a 20-minute intergenerational worship service. Following that service, attendees would break out into a variety of sessions. In those sessions, we would explore our spirituality together. Most sessions would be interactive, and many would be intergenerational. This would be markedly different than listening to a sermon from the pews. UUC members would be invited to offer ideas and offer to lead sessions.

Within a month of presenting the idea to staff and Teams, convening a group and advertising to the congregation, the first Community Sunday happened. Getting something so different started so quickly was a culture change in itself. Once per month, we have offered 3- 5 workshops on Community Sunday. They have ranged from birdwatching on UUC grounds, African drumming, singing, labyrinth walking, discussion group for parents, how to recycle effectively, creating a mural to be used by GreenFaith at rallies, and more.

We received feedback from parents that they wanted more child-friendly activities, so we have been more intentional about including those. On the other end, the discussions offered for the first couple of months were very popular. Some people come because of Community Sundays, and some avoid them. The increased family engagement on those days has been noticeable. We have not always guessed correctly which room would best suit who would want to attend a given activity. We planned to do drumming outside on a day that it rained. The process has required flexibility, creativity and openness. Janan created tracking sheets and feedback forms to help us with recording ideas and receiving ideas.

We are still in the beginning months of offering Community Sundays and expect these to evolve over time. We are committed to constantly reviewing and adjusting what we are doing to make this the best experience possible.

CONGREGATIONAL CARE

Annual Report 2022-2023

Submitted by Greg Schropp, Team Member

Page 1 of 2

The Congregational Care (CC) Team meets monthly and serves several areas in the life of the UUCC.

The Team's current members are: Sheila Lay, Chair, Annie Flint, Janice McNeely, Catherine Covington-East, DeWitt Crosby, Janet Palmer, Judy Love, Nancy Greene, Rob Marcy, Vivian Brenner, and Greg Schropp, with Kelly Greene as the team's Staff Liaison.

The CC Team has mailed 123 cards (includes 60 holiday cards) to celebrate joys, offer sympathy, and encourage recuperations. Janie McNeely manages almost exclusively most of these communications.

The CC Team - lead by Nancy Green, Sheila Lay & now Judy Love - with help from other team members, as well as other outstanding volunteers has hosted five Memorial Receptions, which are the first ones UUCC has had since the beginning of the pandemic in March 2021. The Memorial Receptions for this past year were for Brenda Dillon, Chris Clark, Tawana Wilson-Allen and Fred Hutchinson. Also, Sheila Lay assisted in the home of former member Karen Parker, for a Memorial Service for Karen's husband.

The team provided six prayer shawls to grieving or gravely ill members, all made by members of our Healing Threads group, who also meet monthly. In addition, 44 shawls were given by the UUCC's Healing Threads Group (overseen by Kathleen Moloney-Tarr) to Kinder Mourn.

They gifted two baby blankets along with a meal, all made by church members, to new UUCC parents and former UUCC youth & potential members.

The CC Team delivered over 44 meals (sometimes combined with a home visit) to congregants made and delivered by various CC Team members throughout the year. Multiple members of the CC team paid over 56 visits to UUCC members that were homebound for a number of various reasons.

Various CC Team members provided transportation for such things as shopping, medical appointments, etc. throughout the year.

Other miscellaneous services provided by the CC Team throughout the year included the delivery of flowers, clearing out a shed, home & yard care and providing overnight housing following a medical procedure.

CONGREGATIONAL CARE

Page 2 of 2

Janice McNeely provided the Minutes for our monthly meetings.

Note, originally Linn Martin was to take over as Congregational Care Team Chair for Sheila Lay, but Linn took on the role as UUCC's new Contracted Coordinator of Adult Religious Education/Spiritual Development and so graciously Sheila Lay continued on as Team Chair. Sheila will rotate off as Chair this year and the team will go to a rotating chair option. We would like to express our immense gratitude for Sheila for leading this team in such a compassionate manner.

DENOMINATIONAL RELATIONS

Annual Report 2022-2023

Submitted by Kelly Greene, Staff Liaison

Page 1 of 1

The Denominational Relations Team members were Rebekah Visco (liaison for Intersectional Justice), Rob Marcy, Karen Bringle and Caroline Webber (liaison for Adult Programming).

This was the first year in several years that UUCC has had a Team focused on connection to Unitarian Universalism (UU). We have people who have been involved in UU for a lifetime and a brand new UU. This is so that what we do can be informed by the perspectives of members with a range of experiences with UU. Since we recognize that there are many educational and justice opportunities in the wider UU universe, we have liaisons from Intersectional Justice and Adult Religious Education and Spiritual Development on this Team so we can coordinate efforts with them.

Our first event, in October, was a vibrant and well-attended postcard writing party in partnership with UU Justice NC. We partnered with Adult Programming to offer multiple classes to educate people about the initial draft and the second draft of Article II of the UUA bylaws – including a 4-session UU Wellspring class. We also offered a 4-week discussion group on the UUA Common Read, *Mistakes and Miracles*, about UU congregations that attempted to become multicultural. In addition, congregants are now receiving more communication about offerings and issues throughout UU.

Given the importance of the proposed changes to Article II, we anticipated and encouraged greater participation in the annual UUA General Assembly (GA). Since there was not a formal process for how delegates were chosen or how they were expected to vote, we developed a process, then proposed it to Staff, then to the Board. It was approved by the Board. Currently, nine UUCC members have committed to being delegates at GA this year, with two additional delegate slots available. We plan to continue to inform, educate and engage UUCC members on all things UU in the coming year.

INTERIM MINISTRY TRANSITION

Annual Report 2022-2023

Submitted by Lisa Bovee-Kemper, Staff Liaison

Page 1 of 2

The Transition Team was convened in August of 2022 at the beginning of the interim period. The team has two main roles and will remain active throughout Rev. Lisa's time at UUCC. The two main roles are:

- To work with the interim minister to assist the congregation in moving through the interim period, and
- To act as support and sounding board for the interim minister for the duration of the interim period.

The Interim Search Team met with Rev. Lisa in early August to discuss the Transition Team's role and scope – it is common for the transition team to be formed from the interim search team. Megan Van Fleet, John Burns and Melissa Vullo agreed to stay on. Paul Wilson did not stay on the new team because he was also serving as board co-chair. Shandra Stout joined the team shortly thereafter.

Initially, the team's work was focused on helping Rev. Lisa get oriented and on reviewing and understanding its role in the interim period. Toward that end, in October they participated in a Transitional Ministry Seminar offered by the Interim Ministry Network. That provided helpful orienting information, as did the UUA's Transitional Ministry Handbook and the book *In the Interim*, eds. Barbara Child & Keith Kron.

By January, the team began to plan and schedule a Sunday service dedicated to reviewing the history of UUCC and creating a timeline of same. History is one of the five interim areas of focus. This service happened on January 31. In addition, they attended the January board meeting, presenting some of the learnings from the October seminar and their subsequent work, particularly the search timeline, and mentioned that the question of whether two years would be sufficient time to complete the interim tasks had come up in a recent meeting. No action was taken at that time and the board was simply invited to consider the question.

February, March, and April saw the team inviting the congregation to participate in facilitated listening sessions intended to collect information regarding how the congregation as a whole is feeling about UUCC and what sorts of things are important as they move into the settled minister search. Findings were reported to the board at the April meeting and can be found appended to the April board minutes.

INTERIM MINISTRY TRANSITION

Page 2 of 2

Overall, the team has worked hard to support Rev. Lisa and help the congregation stay informed about the progress of the interim ministry. Toward that end, an “interim ministry” page was added to the website early in the year, and the team is working to keep information up to date and give timely reports to the community.

The team remains smaller than is ideal, especially moving into the summer and second interim year, so recruitment is ongoing.

INTERSECTIONAL JUSTICE TEAM & ENGAGEMENT GROUP

Annual Report 2022-2023

Submitted by Lisa Bovee-Kemper, Staff Liaison

Page 1 of 2

The UCC Intersectional Justice Team (IJT) is our “umbrella” entity charged with comprehensive leadership of the congregation’s efforts in the areas of Societal and Environmental Transformation. This Team exists to provide essential leadership in our efforts to embody our ambitious Vision, Mission and Ends.

The Intersectional Justice Engagement Group (IEG) is charged with identifying potential partners in the larger community.

For the first half of the congregational year, Kelly Greene was the staff liaison for Intersectional Justice. In January, Rev. Lisa Bovee-Kemper became the staff liaison. At that time, the IJT began a simple review of the IJ structure. Using a simple “what’s working, what could be tweaked or improved” model, the team identified a few goals and some relevant questions.

Since February, the two groups have been meeting jointly with the goal of improving communication and collaboration both internally and with the larger congregation. As was reported in 2021-22 the pandemic shutdown had a significant impact on both access to the work of partner groups and the interest/availability of volunteers from UCC. Rebuilding relationships with existing partners is an essential first step.

Current Goals:

- Improve communication regarding engagement opportunities, making sure UCC at large has access to timely information about issues, partner groups, and action opportunities. This includes but is not limited to *Currents* submissions, website copy, social media.
- Maintain overall commitment to the IJ Guiding Principles and engagement strategies, understanding that the current model was created to align with the ambitious mission, vision, and ends statements adopted by the congregation as a whole.
- Broaden and clarify ways to get involved with intersectional justice work understanding two things:
 1. participation in Core Groups (or similar educational engagement opportunity) is the most effective way to learn and go deep into transformational work, and
 2. not everyone in the congregation has the capacity to go deep, but there are many ways to participate in the work.
- Create an “on ramp” to meet the needs of folks who aren’t able to participate in Core Groups (or similar) but still want to be part of the work.

INTERSECTIONAL JUSTICE TEAM & ENGAGEMENT GROUP

Page 2 of 2

Since naming those goals, IJT and IEG have been working together to identify related action steps and implement them. The current focus is on rebuilding relationships with current partners, increasing denominational connections at the state and national levels, and improving overall communications.

We have identified four categories of social justice opportunity while maintaining a commitment to prioritize relationships with and support of our intersectional justice partners and guiding principles. These categories are:

1. Identified and vetted partners
2. One-time events/activities approved by staff and IJT. (e.g. Get out the Vote)
3. Interfaith connections (e.g. MeckMin)
4. UU affiliated group activities/opportunities (e.g. Side With Love)

We have also set a goal for Fall 2023 to work with the incoming Director of Lifespan Religious Education to ensure that UUC members have access to the kind of deep personal engagement and learning that has been the hallmark of the Core Groups. We are open to using the existing Core Group model or something similar that meets the same goals.

Finally, we are working with the Communications Team to create a dedicated “opt in” intersectional justice “action alert” email list that will increase our ability to communicate with interested parties in the congregation, especially regarding fast-moving advocacy opportunities that don’t adhere to the weekly communication schedule.

Overall, IJT and IEG have done good work streamlining processes while maintaining the integrity of the intent of the intersectional justice commitments UUC has made as a community. With new members coming on to the team in July and a solid foundation to continue to build on, particularly in the area of ongoing and effective communication, we are hopeful that we can continue the momentum into the Fall.

MEMBERSHIP

Annual Report 2022-2023
Submitted by Kelly Greene, Staff Liaison
Page 1 of 2

The Membership Team looks for ways to improve the welcoming and engagement of visitors, new members and existing members. Catherine Covington-East, Gwynne Movius, Mary Bruce, Michelle Dillon, Meagan O'Connor and Liza Pratt served on the Membership Team this year. Kelly Greene was the staff liaison.

This was the first full year the congregation was able to meet in person post-pandemic. More than in the previous two years, focus was on in-person participation at UUCC. This year, we have also had an interim minister. These are some of the changes that have impacted membership in 2022-2023.

As of April 30, membership is 522, down from 570 at the start of the year. We've removed 78 members and added 30. Six members died, 11 moved. We had 21 Board removals (members who did not give a contribution of record for 12 or more months). Given that we had not done Board removals since the start of the COVID-19 pandemic, this number was unexpectedly small. However, the remaining removals were members who contacted us to resign. It is an improvement for members to contact us to let us know they no longer want to maintain their membership rather than just ghosting us. While a few members had spiritual changes and a few others had other life changes, the rest overwhelmingly had not been involved in UUCC since before the pandemic or longer. This tracks with cultural shifts in the United States as participation in organized religion shrinks. We did try to re-engage members who had not returned but some did not come back. However, occasions such as the 75th anniversary celebration and new groups such as UUCC Gamers have brought out people we thought might have left us.

Thirty adults and six children joined UUCC in the 2022-2023 congregational year. That is up significantly from the 16 adults and six children who joined last year, though the ratio of kids to adults is lower. Many of our new members are already longtime UUs, some new to Charlotte and some returning to UUCC. Only 9 of the new members are under 50. Though we see younger people visit each week, we recognize we can improve in helping them want to return, get involved and become members. Community Sundays, which include a 20-minute service followed by interactive, intergenerational workshops, are part of that effort.

We have a strong core of members who volunteer in many ways. It is also true that on average, people are volunteering less frequently than in the past. We have long lists of people who indicated they wanted to volunteer but rarely actually do it. This is part of a cultural trend of people wanting to do less and be less committed. At the same time, (our reduced) staff is encouraging member leadership. In this tension, we are working to adjust what gets done, how and by whom etc. to ensure we continue to

MEMBERSHIP

Page 2 of 2

thrive as the culture and staff change. In some instances, Teams now have specific roles. For instance, Michelle Dillon has been instrumental as the person who coordinates Sunday morning volunteers and Mary Bruce has done the essential work of sending welcoming emails to every newcomer who completes a visitor card.

In the fall, an Activities and Groups Fair was offered after service in Freeman Hall. All affinity groups, volunteer areas and Teams were invited to have tables, share information and chat with interested attendees. This was a wonderful opportunity for people to connect with ways to get involved in the life of our congregation. It was noted that the noise level was significantly higher than usual due to the amount of conversation happening. We did have a bump in the number of people who signed up to volunteer and some mentioned they learned about groups they had not been aware existed.

Led by Catherine Covington-East and aided by a Memorial Endowment Trust grant, a short video introducing people to UUCC is almost completed. Using filmed interviews of members and footage of activities at UUCC, this video will focus on our members and their experiences of being a part of this community. We look forward to using this as another way to showcase the joy, meaning and connection our members find at UUCC.

Going forward, we will continue to explore new ways to engage existing and prospective UUCC members.

MUSIC

Annual Report 2022-2023

Submitted by John Herrick, Staff Liaison

Page 1 of 2

The Music Team this year was comprised of Lisa Lackey, Judy Love, Debbie Marr, Lee Martinec and Janet Palmer, 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. Kaarin Record returned this year as our collaborative pianist.

The year began with summer services and special music by the Adult Choir for the departure of Rev. Jay Leach and the arrival of Rev. Lisa Bovee-Kemper. The Adult Choir rehearsed sporadically throughout the summer, culminating with an outreach program to Brookdale Carriage Club on August 28, singing to a packed audience there. On August 17, the Music Team and Community Building Team hosted a joint screening of the "Summer of Soul" documentary, preceded by a "Soul Food" potluck; both were well-attended.

In September, the Adult Choir, Handbell Ensemble and Children's Choir resumed regular weekly rehearsals. The Adult Choir weekly attendance ranged from 24-30 singers and the Children's Choir weekly attendance ranged from 8 to 12 children; the Handbell Ensemble is comprised of 10 ringers. The Adult Choir and Handbell Ensemble performed in services throughout the year. The Children's Choir sang in the Thanksgiving Sunday service, the family-friendly Christmas Eve service, February's Community Sunday service and the 75th Anniversary service.

During the holidays, members of the Adult Choir sang carols for UUCC members who don't get out often: Ann Wood, Linda Dobson, Loyd Dillon, Bob Atwood and Larry Bennet. The Adult Choir also sang in a holiday outreach concert at Brookdale Carriage Club, where a number of UUCC members live. The choir returned to Brookdale for a Singing Valentine program on February 12.

In February, the UUCC started offering third Sunday "Community Sundays," shortened services followed by special programming intended to bring all ages together. The Adult Choir and Children's Choir sang in the first Community Sunday service, followed by a Hymn Sing workshop offered by the Adult Choir. The Handbell Ensemble led a special workshop for the Community Sunday in May.

Members of the Music Program were very involved in the 75th Anniversary JUUbilee Celebration on Saturday night, April 29 that featured Mic Elvenstar, the Adult Choir with Kaarin Record accompanying, Emily and Rob Katz, and Jennifer McLeod, plus the Children's Choir and the UUCC Band via pre-recorded video.

MUSIC

Page 2 of 2

Music Sunday this year took place on Sunday, May 7 and featured the Adult Choir, brass sextet, instrumental soloists Kathy Allen on oboe, Tristan Burns on French horn and Eddie Wielunski on violin. The brass quintet was comprised of Dale Allen, John and Tristan Burns, Ben and Charlie Schomp, and Paul Wilson. Kaarin Record was the collaborative pianist and John Herrick played the organ. The title of the service was "Poets, Prophets and Saints" and featured poetry set to music.

Special musical guests this year included Emma's Revolution in September, Jessica Borgnis and Harley Quinn in December, along with UUCC member Eric Wilhelm on drums, Kinsey Fournier and Daniel Martinec, both on clarinet in May, and our resident brass trio, comprised of John Burns, Paul Wilson and Lee Martinec.

Special community-building Music Program activities included post-rehearsal receptions throughout the year, pre-rehearsal dinners for the Handbell Ensemble and a progressive potluck on Saturday, May 20. As of the writing of this report, planning for summer musical activities is underway.

WORSHIP

Annual Report 2022-2023

Submitted by Rev. Lisa Bovee-Kemper, Staff Liaison

Page 1 of 2

The worship team this year was made up of Cathy Croy, Shelagh Gallagher, Laura Hamilton, Dick Kistler, Rebecca Ransom, and Sharon Baker, working with staff members Rev. Lisa Bovee-Kemper and John Herrick.

A primary goal stated by Rev. Lisa early in the year was to increase feelings of inclusion and welcome in the sanctuary on Sunday mornings. Initially the team focused on increasing participation of children and youth in Sunday services. This supports the overall goal of intentional welcome and inclusion, as well as increasing overall access to multigenerational community. Initially the team encouraged Rev. Lisa and CYRE to work together to provide engaging multigenerational services, which was effective.

Soon the team decided to implement a “first fifteen minutes” with children and youth in the service on the first and third Sundays. This was to start in February 2023, but when Community Sunday was introduced, also in February, the schedule was tweaked to include First Fifteen on the first Sunday and Community Sunday on the third Sunday. So far, the response to both of these changes has been almost entirely positive. In the spring, fidget packs and coloring pages for all ages were made available on all Sundays.

Throughout the year, Rev. Lisa, John H., and the team have experimented with various changes and tweaks to the service order, some of which have been successful, and others have not. Overall, feedback on Sunday service content and flow has been positive. In particular, members reported a high level of interest in the Lay Service Leader’s personal reflection which is shared by the team. Topical integration of music and spoken aspects of the services is also important to the congregation and perceived as being well-executed at this point.

Historically, the Worship Team’s role has been largely one of making sure the lay led services are scheduled, providing feedback on service content, order, and execution. Early in the year, Rev. Lisa encouraged the team to consider shifting and/or expanding that role to include planning and participating in periodic lay led services and serving as hosts to welcome and orient guest speakers when the minister is not in the pulpit. Some team members also serve as Lay Service Leaders, though it is not required to be on the team to do so.

UUCC continues to have fairly consistent livestream and in person attendance, though the in person numbers have not increased sufficiently to warrant re-instating the second service. We will need to keep an eye on this as engagement hopefully

WORSHIP
Page 2 of 2

continues to increase in the fall. Community Sunday services have had a notable impact, consistently providing higher in person attendance numbers in particular.

Rev. Lisa is out of the pulpit for the 5 Sundays of July, though she will be in the office and assisting with service guest coordination during that time.

DIRECTOR OF ADMINISTRATION REPORT

Annual Report 2022-2023

Submitted by Alesia Hutto, Director of Administration

page 1 of 3

This is my third year in this role after being a part of this wonder staff for over 17 years. This is the first year since the beginning of the COVID-19 pandemic that we were open at 100% capacity for events and services as well as the Open Door School. We continued to monitor the pandemic, review suggested protocols from the Centers of Disease Control (CDC), offer masks, and plan for social distancing when necessary. We continue to benefit from a committed professional staff and a resolute group of dedicated volunteers.

Staffing

The 2022-2023 congregational year ended with a professional staff transition. Rev. Jay Leach's almost 20 year settled ministry concluded on July 31, 2022. A celebration was held in Jay's honor on Saturday, July 23 which included food and entertainment. After the conclusion of his final service on July 31, a reception was held in Freeman Hall for members to say goodbye, enjoy cake and write messages of gratitude.

Rev. Lisa Bovee-Kemper began her tenure as Interim Minister on August 1, 2022. Her first service was held on Sunday, August 7, followed by a welcome reception in Freeman Hall. Rev. Lisa has settled into her ministry and continues to work with the transition team to prepare the community for settled ministry.

This year the UUCC hired its first ever Director of Lifespan Religious Education, Paula Gribble, who will begin her tenure on August 1, 2023. The Director of Lifespan Religious Education Search Team included Galen Stout, Peter Huxtable, Melissa Schropp, Alesia Hutto and Rev. Lisa. Paula is highly qualified, as her bio and professional record attest, and has the professional experience and connections to support and reimagine a program of our size and scope.

Over the last three years, we have been well served by our Religious Education Coordinators: Sharon Baker, Linn Martin, Michael Amy Cira Rodriguez, Melissa Schropp, and Lisa Walls. A special thank you goes to each one of them for their hard work during a very difficult time. Their commitment to ensuring that we are able to continue to offer quality religious education programming has been invaluable.

Overall Financial Picture for 2022-2023

Year-to-date current year pledge payments are trending well below budget. When factoring in other income, total income is 10% below budget. This is due to several factors which include member attrition, timing of pledge payments and some members being in arrears. Other income lines such as contributions and other income continue trending above budget.

DIRECTOR OF ADMINISTRATION REPORT

Page 2 of 3

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 surplus budget was projected but it appears that we will end the year with a small deficit due to current income projections for May and June. If income exceeds those numbers, we could break even or have a very small surplus. Any end of the year surplus will be allocated to reserves.

Budgeting & Stewardship

The strategy for the 2022-2023 congregational year was to focus on connections. Building on our tagline of “Cultivate Courageous Connections,” the goal was to get members to connect more with the community by not only attending gatherings, but also through generosity. To allow for more time to build these connections our stewardship process transitioned from monthly to quarterly.

Our quarterly approach combined September, October and November as the “Fall Pledge Group,” December, January and February as “Winter Pledge Group” and March, April, May and June as “Spring Pledge Group.” Each three-month group’s process consisted of messages and canvassing in month one, return of pledges, follow-up and celebration/appreciation/thank-yous in month two and a “Share the Plate” campaign in month three. This new process allowed for three major goals: giving the canvassers six weeks to speak with members, more time to follow-up with those who don’t respond and celebrate/show appreciation in a more intentional way.

The Stewardship Team encouraged generosity at the 5% level across the board through direct messaging, peer-to-peer canvassing, messaging through member families who act as “cheerleaders” by offering testimony and encouraging financial commitment, through stewardship messages for Sunday services or a notice in *Currents*. We thanked members who pledged with a letter from the congregation and/or with and a handwritten thank you note with a handmade craft from our CYRE youth (those who pledged generously).

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 aren’t responsive to our many communication efforts. This year’s average response rate is 53% compared to last year’s 60%. The team understood that some of our communication methods may not be effective for some people.

As of May 15, existing pledges are down by \$69,739, but that reduction is offset by \$42,020 in new member pledges which equates to a \$27,719 loss compared to last year’s pledge total.

DIRECTOR OF ADMINISTRATION REPORT

Page 3 of 3

More than 60% of the total reduction in pledges is due to member resignations. We have lost several members for various reasons which include, but aren't limited to moving, finding a new spiritual home and of course the loss of our two ministers. We are now in transitional ministry and this attrition isn't unusual. The bright spot is that we have seen new members find their way to the UUCC. New members continue to join monthly.

This year's campaign resulted in a 2023-2024 Proposed Budget with a deficit of approximately \$12,000. Emails were sent to the congregation in addition to some targeted members of the community to help close the deficit. In the coming years we will need to increase giving for the UUCC to sustain what we offer and live out our mission, vision and ENDS.

MET Grant Program

Our Endowment is now valued near \$900,000 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 replacing the sheds on the playgrounds, awnings over the entryways, lifesaving equipment, tents to provide a covered meeting space, video production and support to our Intersectional Justice partner Re-Entry Housing Alliance.

The Endowment Trustees announced in January that there is \$46,000 available for potential grants for the 2023-2024 congregational year. They invited recognized UUCC Teams and groups to apply for projects that meet the grant program's guidelines. The deadline for submissions was March 31. This year they received four grant requests. The grant applications were reviewed at their meeting on May 2, 2023. The grants awarded will be announced at the annual Congregational Conversation on June 4.

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—Tom Nunnenkamp, Elaine Peed, Charles Pilkey, Greg Schropp, Jim Van Fleet and Melissa Vullo. 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.

BUILDING AND GROUNDS
Annual Report 2022-2023
Submitted by Charles Pilkey, Chair
page 1 of 2

The Building and Grounds (B&G) Team members include Tom Beggs, David Johnson, Rocky Hendrick, Dan Maples, Tom Moore, Charles Pilkey, Roy Smith, and Virginia Sullivan. Alesia Hutto, UUCS Director of Administration serves as liaison to the team.

The Building and Grounds Team continued to be very active this year. The team was able to hold two building and grounds workday on Saturdays, November 5 and April 15 at 9:00 a.m. which were not open to volunteers.

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:

- Installed lattices around the bases of the new playground sheds.
- Removed old wood beams and rebar from the playgrounds.
- Cleaned out the outside gated area housing our HVAC systems to ensure the drains were free of leaves and other foliage.
- Installed a new ramp on one of the sheds.
- Installed a peephole at the emergency exit to the Sanctuary.
- Removed of a dead tree.
- Cleaned the cushions of the meeting room chairs and the janitor's closet.

Upcoming and ongoing projects:

- 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 UUCS events after dark.
- Coordinate an assessment of our trees by a certified arborist who is familiar with our property.
- Install awnings over the exterior doors.

It was reported by Open Door School that there is some water damage on the concrete wall that runs parallel with Sharon Amity Rd. Member Joe Spencer, a former engineer, assessed the damage and submitted a report to the Building and Grounds Team to review at their October meeting. He assessed that the damage can be attributed to two factors, the backing up of the downspouts over that area and the sloping of that area near the windows. He provided the Team with recommendations to address the issue. With the assistance of Joe Spencer, members of the team are setting appointments with contractors to obtain estimates for the work with the goal of completing the repairs over the summer months.

BUILDING AND GROUNDS

Page 2 of 2

Valerie Vickers, CYRE Team and gardening group member, presented a proposal to update the gardening areas near playground #3. She has offered the UUCC/ODS/CYRE an amazing opportunity to upgrade the fenced enclosures/gardening area with an eagle scout and other volunteers as a major project. The proposal includes:

- Building a chest that could hold the water cans, trowels, etc. needed for planting and possibly building a low worktable for young children. Re-seeding the fencing as erosion is pushing it outward. Replacing the planting beds.
- Taking down the fence next to the playground (not the parking lot) and
- Creating a special seated area for children and/or also some worktables for more creative spaces to work, other than picnic tables. Replacing the hanging blackboard on the playground fence next to these areas.
- Removing the compost bins and replacing them with composting areas.

The final plans for the project have been firmed up and the work is scheduled to be completed during the first three months of June 2023.

COMMUNICATIONS

Annual Report 2022-2023

Submitted by Belinda Parry, Staff Liaison

Page 1 of 1

The Communications Team oversees all communications at the UUCC and 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. Communications Team this year were Susan Carpenter, David Dixon, Courtney McLaughlin, Kimberly Melton, and Debbie Rubenstein.

The team finished the 2021-22 community year by surveying the congregation to determine how members were receiving updates and information from UUCC, which UUCC communication platforms were working well, and ways that communication at UUCC could be improved. Based on the responses, the team determined that some of our current platforms were doing what they were intended to do (*Currents*, website) and that some could use a stronger focus (social media platforms).

We created a strategic goal for this program year: *Identify our communication tools, evaluate the effectiveness and purpose of those tools and then ensure that leadership teams and members know about, understand, and are comfortable with those tools so they can connect with the work of the community and with one another. Define the role of the Communications Team at the UUCC.* To that end, team members attended other leadership team meetings and had conversations about how those teams currently utilize UUCC communications platforms and what they would like to see.

As of this writing, we are composing and revising a comprehensive report of our findings, a Communications Tip Sheet intended to help UUCC stakeholders access and create communications, a Google form for communications submissions, and an updated Social Media Policy.

In addition to the work on the strategic goal, the team collaborated on several smaller projects, including creating a logo for the 75th Anniversary JUUbilee and revising some of our existing marketing handouts.

We are looking forward to working with staff and other UUCC leaders this coming year to ensure that the community is well informed about UUCC programming, partnerships, and announcements and to increase our social media presence.

FINANCE

Annual Report 2022-2023

Submitted by Alesia Hutto, Director of Administration

Page 1 of 2

The Finance Team for the fiscal year of 2022-2023 has been chaired by Melissa Vullo. Other members of the Finance Team include John Burns, Chip Dickerson, Ron Maccaroni and Joe Simmons. Alesia Hutto serves as the UUCU 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 UUCU. As a Team, we review the monthly financial statements including the UUCU 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 UUCU 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 UUCU Coordinating Team, and some of the issues we addressed this past fiscal year, in addition to the monthly financial statements, are as follows:

1. Year-to-date current year pledge payments continue to trend well below budget. When factoring in other income, total income is 10% below budget. This is due to several factors which include member attrition, timing of pledge payments and some members being in arrears.
2. The decision to move forward with filling the Director of Lifespan Religious Education and part-time assistant positions without having the pledge receipts to cover the position. The decision was made in February when stewardship results showed a modest increase over last year. It was projected that we would need an additional \$11,000-\$20,000 depending on the qualifications of the approved candidate.
3. We improved communication with the congregation about financial matters, adding a quarterly financial update to the Coordinating Team report, 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. A chair of the Finance Team completed the internal financial audit of the Memorial Endowment Trust (MET) for the calendar year 2021. The internal audit for the MET for 2022 is in progress.

FINANCE
Page 2 of 2

5. The balance of our reserves is \$186,000. When paying off the mortgage there was a promise made to the congregation, we would allocate funds to replenish the reserves. We budget \$24,000 annually to reserves and that will continue into the 2023-2024 congregational year, unless our financial situation warrants that we halt those payments.
6. We are proposing a deficit budget this year due to lower than expected pledge receipts.

The Finance Team meets on the second Tuesday of each month and keeps a close watch on the financial operations of the UUCC. If there is anything a UUCC 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
2022 Annual Report (For Calendar Year 2022)
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 (UUC) 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 UUC:

MET Board of Trustees

Fred Dodson
Rita Heath
MaryAnn Hendrick
Ellen Holliday
Randy Whitt
Tom Nunnenkamp - chair

Legacy Society Membership

The Legacy Society consists of those UUC 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, 2022, there were 84 individuals who have declared themselves Legacy Society members. As was noted in the 2021 Annual Report, Simone Lake was profiled as a Legacy Society Member and her profile mailing was subsequently done in January 2022.

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.

MEMORIAL ENDOWMENT TRUST

Page 2 of 6

4. Periodic after-service MET tables in Freeman Hall.
5. Periodic social events.

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 2022, 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.

In 2022, the MET received 73 gifts and bequests in memory of or to honor UUCU members or their families. The total of the gifts and bequests for 2022 was \$84,266.

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
2022	\$84,266

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 UUCF Finance Committee or its appointee. During 2022 the UUCF Finance Committee completed its 2021 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.

MET Assets as of December 31, 2022

As of December 31, 2022 the MET assets consisted of \$885,871.01 in an investment account and \$88,388.48 in a checking account for a total of \$974,259.49, which represented an decrease in the market value of the MET assets from 2021. A summary of the year-end MET balances since 2001 follows:

MEMORIAL ENDOWMENT TRUST

Page 4 of 6

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
2022	\$974,259

MEMORIAL ENDOWMENT TRUST

Page 5 of 6

2022 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 2022, the MET awarded five different grants totaling \$43,900:

\$2,500 was awarded on behalf of UUCS Professional Staff to create an Audio-Visual design for the Sanctuary. The design includes Audio Visual systems development and infrastructure plans.

\$5,500 was awarded on behalf of our Membership Team to create a UUCS video. This video would be a 2–3-minute introduction to help visitors learn about our community.

\$5,000 was awarded on behalf of the Intersectional Justice Team working with the Re-entry Alliance, a UUCS Partner Organization, to aid with the Transitional Housing Launch.

\$3,700 was awarded on behalf of the CYRE team for CYRE Safety Features The objective is to provide shelter during inclement weather and life-saving devices in cases of emergency. \$4,400 was awarded on behalf of Building and Grounds Team to create outdoor landscape lighting walkways, traffic circle and firepit area. The current lighting on the property is not sufficient for evening gatherings.

\$4,800 was awarded on behalf of the Building and Grounds Team for awnings over the main doors. The project will install awnings over the main exterior doors leading to the Vestibule.

\$18,000 was awarded to Open Door Managing Team new Playground sheds. This project replaces three aging sheds on two playgrounds providing better upkeep and security for stored items and a safer work environment for its users.

MEMORIAL ENDOWMENT TRUST

Page 6 of 6

2022 Revenues and Disbursements

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

Revenue		
2022 Income (Dividends and interest)		\$5,542.50
Contributions and bequests		\$84,266.00
Total Revenue		\$89,808.50
Disbursements		
Advisory fees (UUCEF)	(\$4,761.28)	
Trustees' expenses (printing, stamps, insurance, credit card fees, etc.)	(\$1,211.53)	
Grants paid during 2021	(\$52,195.79)	
Total Disbursements		(\$58,168.60)
Excess of revenues over disbursements		\$31,639.90
Realized and Unrealized gains/losses in market value for 2022		\$(179,566.76)
Increase/Decrease in MET assets for 2022		\$(147,926.86)

Other Memorial Endowment Trust information:

On June 30, 2022, Patrick McNeely completed his third term as a Trustee of the MET and Randy Whitt was appointed to the MET Board effective July 1, 2022.

STEWARDSHIP

Annual Report 2022-2023

Submitted by Alesia Hutto, Staff Liaison

Page 1 of 2

The Stewardship Team for 2022-2023 is comprised of Erica Blake, Joy Bruce, John Burns, Elaine Camp, Mary Hackenberg, 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, Sarah Graham, Ellen Holliday, Jane Kusterer, Debbie Marr, Kurt Merkle, Gwynne Movius, Mike O'Sullivan, Jinny Sullivan and Paul Wilson.

The strategy for the 2022-2023 congregational year was to focus on connections. Building on our tagline of "Cultivate Courageous Connections," the goal is to get members to connect more with the congregation by not only attending events and gatherings, but also through generosity. To allow for more time to build these connections our stewardship process transitioned from monthly to quarterly.

Our quarterly approach combined the months of September, October and November as the "Fall Pledge group," December, January and February as "Winter Pledge Group" and March, April, May and June as "Spring Pledge group." Each three-month group's process consisted of messages and canvassing in month one, return of pledges, follow-up and celebration/appreciation in month two and a "Share the Plate" campaign in month three. This new process allowed for three major goals to happen: giving the canvassers six weeks to speak with members, more follow-up time with those who don't respond and celebration/appreciation in a more intentional way.

The Stewardship Team continued to encourage generosity at the 5% level across the board through **direct messaging** in marketing materials, peer-to-peer canvassing efforts, messaging through members who act as "cheerleaders" by offering testimony and encouraging financial commitment, through stewardship messages for Sunday services and regular notices in *Currents*. We thank members who pledge with a letter from the congregation signed by the minister and a stewardship team member, and a handwritten thank you note to generous givers from the team and with handmade crafts from our CYRE youth.

Member Appreciation Potlucks held for each pledge group offered a way to celebrate and thank the community for their financial and volunteer support. These potlucks were held on September 24, January 14 and April 15. Although turnout was modest, the members in attendance enjoyed great food, games, bonding with other members of the community and listening to stewardship testimonies from leaders within the congregation.

STEWARDSHIP

Page 2 of 2

The "**Share the Plate**" initiative continued this year as a part of month three of each group's pledge cycle. The agencies, recommended by the Intersectional Justice Team, included Erica's Closet and Compassion Closet. Our next campaign for the month of May will support Mecklenburg Ministries. These campaigns have encouraged generosity which has seen each campaign raising more money than the last.

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 aren't responsive to our many communication efforts. This year's average response rate is 53% compared to last year's 60%. Those who do respond have done so positively and/or provided helpful feedback to the Team. The Team has understood that some of our communication efforts may not be effective for some people. We are hopeful that our Communications Team's efforts to help improve the Community's methods of reaching members will prove more fruitful going forward. Alesia is following up with them about next steps.

As of May 15, existing pledges are down by \$69,739, but that reduction is offset by \$42,020 in new member pledges which equates to a \$27,719 loss compared to last year's pledge total. More than 60% of the total amount of losses in pledges is due to member resignations. We have lost several members for various reasons which include, but aren't limited to moving, finding a new spiritual home and of course the loss of our two ministers. We are now in transitional ministry and this attrition isn't unusual. The bright spot is that we have seen new members find their way to the UUCC. New members continue to join monthly.

We are presenting a proposed budget for the 2023-2024 congregational year with a deficit of approximately \$12,000. Emails were sent to the congregation in addition to some targeted members of the community to help close the deficit.

In the coming years in order for the UUCC to sustain what we offer and live out our mission, vision and ENDS, we will need to increase giving.

OPEN DOOR SCHOOL (ODS)

Annual Report 2022-2023

Submitted by Sheila Locklear, Director

Page 1 of 4

Overview:

Open Door School (ODS) is an outreach program of the Unitarian Universalist Community of Charlotte (UUC). ODS resides in the Children and Youth Religious Education wing of the UUC 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:

- We have worked hard to recover from the effects of Covid over the last few years. We currently have fifteen staff members.
- The school ended the year with 86% of enrollment. (While all our classrooms are open, we have not been able to fill all our classrooms this year.)
- The ODS scholarship fund awarded \$12,915 (due to Stabilization Grant) during the school year, distributed between eight children.
- In preparation for the 2022-2023's school year, for which registration began in January, \$3580 was transferred from the Fundraising account into the Scholarship Fund. (Money from online auction)
- Major fundraising efforts include:
 - Harris Teeter Together in Education (ongoing)
 - Spirit wear sales (fall)
- A financial agreement of fair share between the school and the church resulted in ODS paying the church (approximately) \$27,567 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. There are three children with diagnosed special needs/conditions and nine children from diverse ethnic backgrounds. We have bilingual or multilingual children enrolled. Families travel from twenty-two different zip codes to attend Open Door School.

Community Outreach:

- The following *drives were canceled due to Covid restrictions and lack of volunteers.*
 - Books for Promising Pages
 - Canned goods for Loaves & Fishes
 - Coats for at-risk elementary students in Charlotte

Parent Education:

The Family Community Association offers Adult Education forums. We continued to offer a limited amount of these via videos due to Covid restrictions and by Suzy Moore, office manager and School Director, Sheila Locklear

Maintenance:

- Ongoing minor repairs as needed and ongoing care of the ODS garden. Our playground sheds were replaced this year from a UCC MET grant.

Monthly Happenings:

- ODS Staff and Managing Team Meetings were held in person or via Zoom this year.

June/July:

- Updated registration packets were sent in January.
- Summer Camp was in the summer of 2022, and we are gearing up for 2023 Summer Camp and enrollment is near full capacity.

August:

- The Annual parent orientation *was held on site with good attendance.*

September:

- Our Potluck *picnic was canceled due to rain.*
- We were able to hold our classroom visits (masks were optional).
- Our FCA meets and greets for new families *was also canceled this year* due to lack of volunteers.
- Due to Covid we *did not use classroom volunteers for half the year, but we were able to open our doors to parent volunteers as the year progressed.*

October:

- Free Speech and Hearing Screenings through Speech Center *was brought back this year for our families.*
- Curriculum Night was held and well attended this year. This event aids our parents in gaining a better understanding of Progressive Education.
- Adult Education event: a video was made again this year by Suzy Moore and Sheila Locklear addressing "Progressive Parenting" the link was shared on our social media and by email for our families to view as we are not able to hold our Parent Education Events this school year. We are looking forward to holding all these events in person on site next year.

November:

- Part One of “Rising K” adult education event for parents of rising Kindergarteners
- The annual Harvest Bake Sale was held during families drop off after being cancelled as part of our Spring Fest events.
- Morning “Parent Coffee” cancelled due to Covid.

December:

- Classroom Winter Potluck luncheons were held.
- Coat Drive for Title One school

January:

- In-house Registration for the 2022-2023 school year for currently enrolled families was held.
- Promising Pages book *drive was canceled*.
- Children’s Theatre brought their preschool show to us and was attended and enjoyed by young and old alike.

February:

- The 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 moved to March due to late reopening.
- Class Placements were announced.
- Food Drive *was canceled* for Loaves and Fishes
- The Silent Auction fundraiser *was not held due to Covid Restrictions*.

April:

- FCA are being recruited members for the upcoming school year.
- The Annual Spring Festival *was not held* due to weather.
- End-of-Year family surveys will be collected via Survey Monkey
- Founders Day was celebrated, and the children had their annual parade around the traffic circle.
- Class photos *were not taken*.

May:

- End-of-year Classroom Ice Cream Parties were held on the playgrounds.
- Staff Cleaning Week
- The current Director of the school Sheila Locklear will retire on May 26 and a new director will be promoted from among the current staff.

Open Door School remains strong in progressive philosophy which was promoted by the late Sue Spayth Riley. We continue to work hard to make sure this experience is available to children and families of all levels of society in the future. Enrollment for the upcoming 2023-2024 school year looking promising at 98% or above, with most continuing to fill up while others have lengthy waiting lists.