



**Unitarian Universalist
Community of Charlotte**

ANNUAL REPORT 2020-2021

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IN MEMORIAM

May 29, 2019 – May 28, 2021

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

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

* * *

Barbara Bass
Dale Brook
Betty Burns
Bob Bushorn
Don Crawford
Lee Movius
Marian Paynter
Miguel Rodriguez
Morty Rubel
H. Paul Steiger
Shirley Wagner
Irene Wilkinson
Jerry Zeller

* * *

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 four full-time and five part-time members along with many committed lay members who provide leadership for our congregation. As a self-governing community, we are both free and responsible to determine the mission, programming, and structure that best meet our own spiritual needs.

Spiritual Development and Adult Programming

Rev. Jay Leach <i>Minister</i>	(704) 366-8623 ext. 6032	jay@uuccharlotte.org
Rev. Eve Stevens <i>Minister</i>	(704) 366-8623 ext. 6040	eve@uuccharlotte.org
Kathleen Carpenter (retired 12/31/20) <i>Director of Religious Education for Children and Youth</i>		
Lisa Walls (since 1/1/2021) <i>Religious Education for Children and Youth Coordinator</i>		cyre@uuccharlotte.org
Kelly Greene <i>Membership Coordinator</i>	(704) 366-8623 ext. 6039	kelly@uuccharlotte.org
Rev. Melissa Mummert <i>Affiliated Community Minister</i>		

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

Music

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

Open Door School

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

LEADERSHIP

The vitality of our community depends on the involvement of our entire religious community. Below is a list of our leadership teams and their chairpersons. To learn more about these teams and their work within the congregation for 2018-2019 please see their corresponding reports.



Spiritual Development and Adult Programming Teams

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

Administrative Teams

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

Music

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

ODS Managing Team	David Flynn <i>Chair</i>	Alesia Hutto <i>Staff Liaison</i>
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BOARD OF TRUSTEES

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

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

Your 2020-2021 Board of Trustees are:

Cindy Hostetler

Co-Chair

David Reynolds

Co-Chair

Catherine Barnes

Trustee-at-Large

Lisa Hagen

Trustee-at-Large

Ann Doss Helms

Clerk

Samantha Visco

Trustee-at-Large

Paul Wilson

Trustee-at-Large

Tawana Wilson-Allen

Trustee-at-Large

Vacancy

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

Record of policy and significant action taken by the UCC Board of Trustees
from July 2020 – April 2021

Submitted by Cindy Hostetler and David Reynolds, Co-Chairs, Board of Trustees
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General Organization

The 2020-2021 Board includes the following members: David Reynolds, Cindy Hostetler, Ann Doss Helms, Lisa Hagen, Tawana Allen, Samantha Visco (Replacing Ron Spake), Paul Wilson and an unfilled position vacated by Rocky Hendrick. The Coordinating Team of Jay Leach, Minister, Eve Stevens, Minister, and Alesia Hutto, Director of Administration attends each Board meeting. The Board meets on the third Tuesday of each month. Executive Session meetings are called as needed, and sub-groups meet at various times. Below are specific highlights from regularly scheduled Board meetings of the 2020-2021 fiscal year.

Each meeting of the UCC Board of Trustees begins with opening words, reading of the leadership covenant and the UCC mission and vision. Board members also briefly “check-in” with each other as a way to stay better connected. Agenda items include a review of the Coordinating Team Report, which provides an update on membership, a current financial report, summary of team activities and priorities and significant items of note related to the Community. These reports are publicly available, and discussion is primarily devoted to clarification as needed. A majority of the Board meeting is typically spent on Policy Governance Ends agenda items, with most attention paid during this year to beginning the work on Widening the Circle.

September 2020

- A search team was convened for the role of interim “Lifespan Professional” who will handle the work of the children and adult programs. This person will serve as a change agent to bring more integrated programming for families and multiple generations.
- A group assembled to outline our Covenant continued their work toward the presentation of Right Relations to the UCC membership this spring.
- Widening the Circle of Concern was recommended by the Board to integrate with our Call to Action and Measurement of where we stand now in terms of addressing how Unitarian Universalists address our history with white supremacy and oppression.

October 2020

- A four-person working group continued meeting and discussing how to create a policy governance Measurement Process. The group agreed to begin with the most simple functions focused on facilities and budget.
- Board Membership - Ron Spake resigned his position from the Board and the group discussed replacing this position with a younger member to create more diversity with the Board. Bios and electronic voting were done prior to the November meeting.

November 2020

- Board Membership- Three potential candidates were discussed and bios were forwarded for an electronic vote.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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December 2020

- Right relations: No report this month.
- Measurement group: Submitted this proposed staff survey, based on the one used two years ago but updated to reflect Widening the Circle of Concern and a focus on how to change for the better. All questions will be answered on a five-point scale from strongly agree to strongly disagree and will be anonymized, so no individual responses are identifiable. Each will have a prompt to suggest improvements moving forward.
 - *This is a work environment where I feel heard, respected and empowered.*
 - *This is a welcoming work environment for people from all backgrounds, which I would recommend to applicants from diverse communities.*
 - *As we move toward having more courageous and difficult conversations, I feel like I have the resources to address problems and conflicts.*
 - *My job allows me to contribute meaningfully to the mission and ends of this congregation.*
 - *The work team as a whole is contributing meaningfully to the mission and ends of this congregation.*
 - *My strengths are recognized, and I get helpful and meaningful feedback on performance.*
 - *I believe that I am fairly compensated.*
 - *I feel that my work environment is safe, physically and emotionally.*
- Board voted unanimously to add a question related to workload to address concerns about the current situation (staff transitions, working remotely). David and Cindy will get the survey to staff quickly so we can have results for discussion at the January board meeting.
- Because we have recently lost three experienced staff, the board also agreed to do retroactive “exit interviews” based on the same set of questions, rephrased to reflect what they experienced and with room for open-ended discussion. Cindy and David will handle that, assigning and/or conducting interviews. Goal is to have those finished by the January board meeting as well, with aggregated responses available for discussion. Both will be used for Jay’s evaluation, which needs to be completed by the end of June.
- Board self-evaluation was recognized as the next pressing need, though the board did not determine whether the measurement group or the board as a whole will work on that.
 - MET name change: Approved at special congregational meeting.

January 2021

- Right relations: Rob Marcy sent a revised draft that incorporated some suggestions from the board. His group believes the document is ready to be shared with the congregation and will now move on to plans for carrying out right relations. They will provide a report on that in February. The board received this month’s report with little time to read it; plan is to spend more time with the February report and discussion.
- Measurement: The measurement group designed and distributed this year’s staff survey. Results discussed later in the meeting.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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Membership participation methodology

- Alesia reports that staff are looking at Facebook comments, participation in Zoom events and any other visible signs of participation to identify congregation members who seem to have lost contact for an extended period. Staff then call to make sure no one is “falling through the cracks.” She reports that they have generally been “pleasantly surprised to hear from us.”
- Paul and Cindy expressed interest in figuring out a way to turn this into data that can be used to quantify participation in various events without breaching confidentiality. Alesia and Jay say the system was designed as a pastoral care approach, not a system for measuring attendance, but said they will consider options.

Coordinating team reports

- Question was raised about the status of MET grant proposals. Alesia said all teams have been contacted and encouraged to submit proposals. About five have been submitted that have promise; staff is helping some teams develop their plans. Alesia will include information submitted thus far in the February report with a full review anticipated in March or April.

Widening the Circle of Concern/Policy Updates

- Development of the right relations covenant and conflict resolution strategies associated with the covenant present a near-term opportunity to act on Widening the Circle. No policy action required.
- Barry Ahrendt’s work on anti-racism strategies was discussed. Not all board members have seen that. Catherine will locate that document and forward to all.
- Recruitment and hiring of new staff present opportunities to act on diversity and inclusion, but also not a policy matter.
- Main area of policy focus is related to governance. David suggested the board needs to improve its timeline and process for replacing members, either on the normal cycle or as resignations occur. Board members and congregation members have voiced interest in having a more open and transparent nomination process, including self-nomination and the possibility of having more candidates brought forward for a vote.
- The board agreed to hold a special meeting before the regular February meeting to go into more depth on board governance questions, including how to do an assessment of needs and skills, how to communicate clearly what is expected of board members and how the board can do succession planning. David will poll members to figure out a time.
- The board agreed to do the needs assessment before seeking a replacement for Rocky. A new selection process is not likely to be ready for the 2021-22 slate; we are shooting for the following year.
- Another board task is improving our archiving of documents -- transitions in board leadership and changes in technology can make it difficult to figure out what has happened in the past. No immediate action taken.

February 2021

Right relations: The board unanimously approved the covenant working group’s final draft of a UUCC Covenant of Right Relations. The working group also submitted a proposed framework for resolving concerns. Because board members did not see it until the meeting began, we deferred discussion until the March meeting so we can get up to speed.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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Measurement group: The group reported that its work is currently focused on the staff survey and board self-assessment, to be discussed later.

Member contact: Alesia reported that the staff is going through the required review to remove members who have not made a contribution of record. In order not to remove anyone who wants to stay connected, they are waiting 18 months (more than the required 12 months) to flag someone, then having someone from the membership team try to get in touch. That is followed by a staff contact, and only after that is a letter of removal sent.

Sybil Bernstein award: Members brainstormed ideas for this year's award for outstanding volunteer work. The switch to remote activities poses some challenges, but Alesia explained that it is designed to honor a long period of extraordinary work, not just a single year. Alesia will provide the board some information requested to move toward nominations.

Draft of Currents article: David submitted a first draft and Ann volunteered to edit. The board discussed expanding the information that can be listed on member profiles to help the nominating committee find candidates who bring needed attributes to the board. Kelly's help is needed to revise the online form. Alesia said the article would have to be finished by Feb. 17 to be included in the coming week's Currents. The board decided to wait a week so we can refine the article and include information about how to update member profiles.

Coordinating Team reports

- David asked about a MET grant proposal for outdoor gathering space. Alesia said it is being vetted to see if there's suitable space on the grounds.
- David also asked about the decision not to offer Our Whole Lives this year. Eve explained that the UUA does not recommend holding those classes during the pandemic because the personal nature of those discussions does not translate well to virtual settings. The intent is to bring it back as soon as we can safely hold in-person classes.
- The group found the new data on member participation interesting and a good step toward having metrics. Cindy voiced interest in having some kind of timeline comparison. Eve mentioned that only about one-sixth of young people registered for CYRE are participating in online programming, a data point she sometimes finds discouraging. Several members discussed seeing and experiencing "Zoom fatigue" among youth and adults and encouraged staff to take heart even when participation is not as high as we would like. Virtual connections are clearly important to people who are making them and will provide a foundation for revived in-person activities when that is a safe option.

Widening the Circle of Concern/Policy

Review of Barry Ahrendt's work: Catherine sent material. No immediate action required.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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Board nominations: David presented notes from the Feb. 9 special meeting on the board's needs assessment. The board came up with a list of desirable characteristics for incoming board members:

1. Knowledge of 7 principles
2. Non-profit board experience
3. Marketing
4. Community Organizing
5. Policy Writing and Analysis
6. Diversity of Community Connections and Life Experiences

Members discussed the importance of presenting these as things the nominating committee might want to look at, without setting up standards that discourage participation. Specifically, the issue of class bias came up: Nonprofit boards can be skewed toward big donors, and we do not want to send a message that only affluent members with certain types of careers are welcome as trustees.

- We expect to pick a nominating team in March; members were encouraged to suggest people by Wednesday, Feb. 24.
- The board agreed that a needs assessment and self-evaluation should be built into the calendar for future boards.
- Document archives: Cindy presented a plan for document archiving. Ann, Cindy and David will work on getting this organized.

March 2021

Right relations: The board discussed the covenant working group's proposed framework for resolving concerns. The board agreed it is time to start a community conversation about the covenant and right relations. Catherine will check with Rob Marcy to see if the working group wants to stay involved with that. If so the Board of Trustees and the covenant group will work together on the conversations.

Sybil Bernstein award: The board selected 2021 winners.

Nominating committee: The board chose Margie Storch, Colin Hood and Mike Long as the 2021 Board of Trustees nominating committee. David will follow up and provide instructions to get them started.

Coordinating Team reports

- A question was raised about whether the interim lifespan religious education director would be someone from inside or outside the congregation; CT said outside.

BOARD CO-CHAIR REPORT AND REPORT OF POLICY

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End of Year Wrap Up

In conclusion, during a very challenging year in working with the staff and BOT through the COVID-19 pandemic, we have identified opportunities to strengthen our ability to become a more resilient oversight body. We have also learned through our studies of the Widening the Circle of Concern materials the need for our Community to begin leaning on younger members for positions of leadership to ensure continued long-term success. We have a great nominating team with Mike Long, Colin Hood and Margie Storch. We have done our best to do a needs assessment with the recognition that with two BOT resignations in this time-period that a more thorough vetting and expectations communications of what it means to serve on the BOT needed to be done. With these expectations and concerns communicated to the current nominating committee in their search, as well as a *Currents* article calling for members to self-nominate through our website, we are excited with the prospects that will be on the ballot for approval in June. We are also so thankful to the Sub-Committee on Right Relations in getting us closer to adopting a Covenant which we can all adhere and remind ourselves of in our interactions with one another as we continue to embark on the much-needed work of transformation that sometimes calls for difficult and valuable conversations.

We would like to give a huge thanks to the Staff and all of the Volunteers that kept our services and activity opportunities voluminous and engaging during a time of isolation. We look forward to our continued plans to meet in our sanctuary in person hopefully sometime in September but will continue to find opportunities to meet safely in person before then outside of regular services.

Respectfully submitted,
Cindy Hostetler and David Reynolds, Co-Chairs, Board of Trustees

MINISTER

Annual Report 2020-2021
Submitted by Rev. James C. (Jay) Leach, Minister
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In recent days and weeks, I am noticing quite a few analyses, accounts trying to offer some comprehensive perspective on the long months of the COVID-19 pandemic: what we learned, how we changed, what will return to the ways it was and what is forever altered by this experience. These strike me as significantly premature, even audaciously impatient. Still in what we in this nation hope are the waning days of this horrific time, it seems far too soon to gain any meaningful perspective on it.

So too, within our own community: how do we measure these days, take stock of these months, rightly account for this year? Perhaps I can begin by stating the obvious: it has been a year like none other in the history of this now thrice-named congregation. Never has the Unitarian Church of Charlotte, the Unitarian Universalist Church of Charlotte or the Unitarian Universalist Community of Charlotte experienced (or endured) a year like the 2020 – 2021 congregational year.

Consider for starters that in the course of 52 Sundays, not once did we have a service in our sanctuary. Not once did our education wing buzz with the energy of children, youth and their families. Not once did we gather within our walls for a board meeting, a team meeting, a core group session, a discovery circle. We hosted no joyful weddings, nor did we gather to remember one of our community members upon their death. Christmas Eve was completely quiet, and a similar pall fell over other occasions usually marked by enthusiastic engagement.

And yet . . . the heart beating at the core of this community continued, strained, perhaps, but persistent, nonetheless. My colleagues on our professional staff, along with teams and other volunteers persisted. From the ominous quiet of a complete shutdown rose the regular din of a virtual congregation's activities as we created and offered weekly services, coffee hours, CYRE classes, educational opportunities for adults, social gatherings. We have been a remarkably robust virtual congregation guided by our theme "Becoming the Community We Want to Be: Barriers, Boundaries and Belonging."

Most of us learned whole new skill sets, technical acumen needed both to create what we offered and to access it. Personal videos created on laptops and cell phones were woven together to create services streamed over our website and on our community's YouTube channel. Dozens and dozens of us contributed: speakers, reflections, musical offerings, chalice lightings from members nearby and, on occasion, from musicians far away. And when these "premiered" at 11:15 each Sunday morning, we learned to extend greetings by way of our Facebook page.

CYRE classes, ARES classes and team meeting all proceeded on Zoom as we gradually learned how to mute and unmute ourselves, how to share screens and how to navigate the awkward and annoying vagrancies of this too-often tenuous platform. But, by showing up in this way, some actually found our offerings more accessible, trading in a long drive in traffic for a quiet night before a computer screen at home. That awareness has us considering how to include hybrid offerings in the future—opportunities in-person that will also be streamed for those needing or preferring that way of accessing what we offer.

MINISTER

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Beyond the technology, however, something else sustained the heart of this place. We continued in expansive and impactful ways to reach out in care, concern and connection. Deprived of chance encounters on the vestibule stairway or over a cup of Freeman Hall coffee, many reached out in other ways with calls, emails, cards and even meals. In the toughest of times many of us realized how deeply we rely on the support of this community and we leaned on one another even if at a significant social distance away.

We began this congregational year in the aftermath of the retirements of two cherished members of our professional staff—Martha Kniseley who completed her tenure as our Adult Programming Coordinator—and Doug Swaim who retired from his role as our Director of Administration. Martha completely transformed us over his years of coordinating our approach to congregational care and our focus on Adult Religious Education and Spiritual Development. Doug, as our second ever Director of Administration, expanded the scope of this position and managed our finances and facility with keen skill while becoming a regular programmatic contributor as well. We continue to miss these two and continue to benefit from all they offered.

While enduring these momentous transitions, it was our immense good fortune to be able to hire from within our professional staff. Alesia Hutto assumed the role of Director of Administration and Belinda Parry as our Office Administrator. Their long tenures already on our professional staff fostered both trusting relationships and skillful capacities that have served us well in this particularly difficult year.

Then, at mid-year, we said yet another momentous farewell. Our Director of Religious Education for Children and Youth Kathleen Carpenter retired after serving among us throughout most of the last three decades. Words failed us when we gathered virtually to mark this occasion and fail me now in trying to acclaim adequately the legacy that Kathleen leaves here. The lives of countless children, youth, parents, teachers, advisors and team members have been shaped and changed by her work here. Long will the memory of her presence remain, and we will continue to remember Kathleen Carpenter with a deep debt of gratitude.

So now, as another stunning Charlotte spring proceeds towards summer's heat and humidity, we find ourselves beginning, finally, to plan to be together again. With small social steps and limited registration classes, we will look toward a late summer service and to the opportunity to reemerge as an in-person, face-to-face, real live community! We do so not yet understanding all that we have been through in these last bewildering months. But we recognize that the core of our community is intact and that our heartbeat is steady as we look with heightened anticipation to the days and to the year that lies ahead for us.

Courage,

Jay Leach, Minister

MINISTER

Annual Report 2020-2021
Submitted by Eve Stevens, Minister
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This has been a full and challenging year. Following the retirements of Kathleen Carpenter and Martha Kniseley, I was more grateful than ever for the insight and commitment of our volunteers who have helped make this transition period much more productive and enjoyable than I imagined it could be. As a staff we divided up the responsibilities of our retired colleagues for this in-between time which gave me the opportunity to work with our Religious Education for Children and Youth (CYRE) Team and volunteers, our Congregational Care Team, and our Small Group Ministry Steering Team.

It has been a pleasure working with our Coordinator of CYRE, Lisa Walls, who took on the lion's share of CYRE day-to-day logistics and organization, allowing me to try my hand at writing lesson plans for Elementary and Middle School classes and check in with our youth advisors. I was also able to step into the well-organized and intentional operations of our Congregational Care Team under the leadership of Chair, Sheila Lay. That team took on even more than usual-- due to the challenges brought on by the pandemic for many—and did it with grace and compassion. The Small Group Ministry Steering Team continued to use the well-organized framework created by team member Jan McNeely which kept us on track even as we made changes to accommodate a virtual setting. Lead content writer for each session, Camilla Mazzotta, brought particular heart and creativity to each session and facilitators helped create and maintain a safe space for support and spiritual growth.

There were certainly aspects of this congregational year that were spiritually exhausting. Not being able to gather as a community, to see one another on a regular basis and have a sense of who we are and how we are doing collectively, has been difficult. I have never been more aware of how revitalizing it is to fill your cup with the sights, sounds, and feelings of spiritual community. At the same time, it has been heartening to notice the ways community continues on, even when our gathering place and channels for connection have to be reimaged. Seeing the ways you continued to gather on Zoom and outdoors and seeing your Facebook greetings to one another on Sunday mornings throughout helped the staff remember why our work matters.

As we close the books on this fully remote year in our congregational history, I feel incredibly grateful to all of you who have continued to sustain us financially and to contribute your presence, time and energy to creating a shared space for people of all ages to learn, play, and support one another as we continue learning and growing toward our vision of individual and collective transformation.

Gratefully, Eve

ADULT RELIGIOUS EDUCATION/SPIRITUAL DEVELOPMENT

Annual Report 2020-2021
Submitted by Jay Leach, Staff Liaison
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Under the guidance of Chair Sharon Baker, this year's Adult Religious Education/Spiritual Development Team proved to be an exception group. Other members included: Tom Cole, Alex Creech, Joe Hoff, Shannon Maples and Cyndi Martinec. In a year of transition away from the stellar guidance of retired Adult Programming Coordinator Martha Kniseley, Jay Leach served as the professional staff liaison to this Team.

Our ARES D Team took seriously our Vision and Mission and this year's theme— "Becoming the Community We Want to Be: Barriers, Boundaries and Belonging"—and used these to guide their choices for this year. Each member proved to be deeply engaged not just in Team meetings but in providing offerings throughout the year.

The community benefitted from a remarkable array of offerings all offered in a virtual format this year. From one-time classes, series, panel discussions and book discussion groups, each month of this congregational year featured multiple offerings for our members and guests. Members explored issues of intersectional justice in ARES D offerings examining immigrant issues, issues related to the criminal justice system and an intensive video-based examination of trans inclusion for congregations. Other course offerings invited participants to reflect on cultural competence and on specific environmental justice issues.

A book discussion series—Exploring Boundaries and Barriers Through Books—offered a monthly facilitated conversation and though participation was small, discussions proved engaging.

Included in this year's offerings were others examining issues attuned to our visionary commitment to spiritual transformation.

The ARES D Team more than rose to the occasion in this challenging year. We have been enriched, supported, challenged, educated and encouraged by what they have offered us this year. Thank you, Sharon Baker and Team members for your deep commitment to this work!

RELIGIOUS EDUCATION FOR CHILDREN AND YOUTH

Annual Report 2020-2021
Submitted by Eve Stevens, Staff Liaison
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This has been a full year of transition for our Religious Education for Children and Youth (CYRE) program. Our beloved Director of CYRE for twenty-eight years, Kathleen Carpenter, retired in December. We held a celebration on Zoom that included moving tributes from CYRE volunteers, children, youth, and parents. We reflected together on the ways Kathleen shaped and nurtured our programming for children and youth for decades and the life-changing gifts she contributed to many lives here.

After Kathleen's retirement in December, we brought on long-time member and CYRE volunteer, Lisa Walls as our part-time Coordinator of CYRE to help us navigate the time between Kathleen's departure and the start of an Interim Director of Lifespan Religious Education to keep programming up and running in the meantime.

Lisa Walls proved more than equal to the task. Among other things, Lisa has confirmed with CYRE teachers and advisors their teaching plans for the coming Sunday, sent reminders to parents, written lesson plans for our youngest children, ordered and prepared supplies and curricula for each class, checked in on each Sunday Zoom and in-person class to ensure things are running smoothly, and recruited volunteers to staff CYRE for summer and fall. Lisa has been an invaluable resource, organized, reliable, consistent and welcoming, helping minister Eve Stevens understand the history and traditions around various CYRE initiatives while collaborating to keep CYRE up and running. Eve has written lessons for elementary and Middle School sessions, collaborated on volunteer outreach and supporting teaching teams, meeting with Lisa regularly to determine together what tasks lie ahead.

Throughout the search process for an Interim Director of Lifespan Religious Education (conducted by both ministers along with Craig Harbold, Melissa Schropp, and Julie Smith) we continued conversation about the need to better integrate our programming and community life for children, youth and adults. This, along with the process of reimagining new forms our programming across the lifespan might take in relationship to our congregational Vision, will be the primary focus of our incoming Interim.

Our Coming-of-Age program finished on Zoom with each youth giving their Credo in a variety of creative formats. The mentors and advisors who helped drive Coming of Age forward with the starts and stops created by the pandemic are to be highly commended for their commitment, creativity and patience.

In place of Our Whole Lives (a sexuality education program for all ages which was not recommended virtually for children and youth) there was an opportunity for adults to participate in "Parents and Caregivers as Sexuality Educators" which was well-attended.

RELIGIOUS EDUCATION FOR CHILDREN AND YOUTH

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Predominantly CYRE classes for all ages have happened over Zoom this year. We heard regularly from even the most committed participants that Zoom burnout and overwhelm meant they were stepping back for now but eagerly anticipate being back together in-person. This has led to lower than usual attendance when our attendance had already been decreasing for a number of years.

The most consistent attendance came for our younger classes. Spirit Play (an interactive story that highlights one of our 7 Principles followed by “wondering questions”) was offered for 3- and 4-year-olds with a parent present. We were concerned that our youngest children would not be able to stay focused on the screen without a parent present and this model has continued to work well. Elementary classes also maintained consistent attendance on Zoom with a wonderful group of teachers making sure there were opportunities for learning and fun each week. In April, our elementary classes met in-person for the first time since the pandemic began for an Earth Day lesson. This was well-received and classes going forward will be predominantly in-person.

Our Middle School group saw an increase in participation when they began meeting at a local park to check-in, have a short discussion and then roast marshmallows, go on a bike ride, hike or play yard games. Our advisors have remained creative and tenacious, creating a safe space each week for our Middle Schoolers to connect and feel supported while socializing with others in their spiritual community.

Our High School group on Sunday mornings has been small. The highlights for our High Schoolers were a creative, moving and cohesive worship service offered in the fall and the energy and creativity that went into planning a virtual Charlotte Con. This opportunity for Unitarian Universalist youth from around the region to gather is a beloved annual tradition. This year a number of high school youth came together to plan programming and worship, generously offering a virtual version of Charlotte Con for free. After registration levels remained low the youth decided to cancel but have much planned already for next year.

The volunteers who make up our CYRE Team, and the volunteers who teach and advise our children and youth have consistently showed up to keep our CYRE program going this year while navigating their own stress and challenges at home. We are incredibly grateful to the volunteers who came in every six weeks to organize and fill Activity Bags to give our children in the youngest classes some hands-on materials to help make online class more engaging.

The members of the CYRE Team this year have been Emily Boone, Kendra Dixon, Tracy Hickman (Chair), Cecily Manejwala, Erin Maness, Debbie Rubenstein, Greg Schropp, Stefanie Smith, Lisa Walls, Kevin Yount.

Tracy Hickman as Chair has done a wonderful job keeping the team organized, supporting initiatives set in motion before Kathleen retired, and encouraging volunteers all while teaching Spirit Play most Sundays.

COMMUNITY BUILDING

Annual Report 2020-2021
Submitted by Eve Stevens, Staff Liaison
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The Community Building Team continued to show heart as our time as a predominantly virtual congregation continued. As we have considered and planned both virtual and in-person events this year, not surprisingly, our team members' sense of what felt like safe and responsible means of gathering during the pandemic ran the spectrum of opinion. Staying in conversation and hearing one another the team pulled together to help organize, host and give feedback on an array of virtual and in-person offerings over the past year.

A number of members are to be particularly highlighted as leaders of fun, merriment and social connection against the odds, going above and beyond in their gifts of time and energy as well as consistent commitment to this community. Summer through winter, Jane Kusterer hosted a number of virtual gatherings inviting members to share memories, life stories and a delightful show and tell of family mementos and favorite art works on Zoom. A few of these gatherings were created specifically for seniors and Jane went out of her way to help engage our older population during the most isolating days of the pandemic. Bailey Reidinger has served as Zoom and tech orchestrator extraordinaire throughout the past year, enabling game nights, Member Appreciation Nights, Coffee Hours and more. Althea Clark led the charge on creating welcoming and joyful Coffee Hours and helping members maintain connections and getting virtual Social Suppers in motion. Althea also partnered with Joe Spencer to bring weekly Firepit Fun to the UCC parking lot during the winter and spring so members could gather for music and conversation weekly. Many of our Affinity Group leaders are to be applauded for finding ways to continue bringing their groups together (walking, hiking, biking, support for anxiety and depression, etc.) in particular, Jinny Sullivan who stepped forward to take on the logistical tasks of bringing Senior Connections back into being after months of dormancy.

Our virtual offerings have largely gathered a small attendance throughout the pandemic. Still, we felt it important to continue putting social virtual offerings out there to ensure there were ways for our most isolated members, in particular, to engage with community. The team put on reoccurring game nights which were marketed specifically to young adults that maintained a small, committed crowd. Social Suppers on Zoom brought together a small contingent who shared recipes and sat down to the screen with the same meal and guided conversation. We attempted a virtual Christmas Eve cookie reception that was appreciated by those in attendance, but again very small. Partnering with the Stewardship Team for virtual Membership Appreciation nights has been a highlight of the year with high attendance, great content and a good time. The team celebrates the Stewardship Team's initiative and was happy to help out.

The most consistent and vital virtual offering has been Coffee Hour following each Sunday service. Team members and staff take turns hosting each week and we tend to have between 15 and 25 people in attendance. After feedback from staff, we pivoted from having a large group check-in each week to rotating game playing, small group reflection, idea and resource swaps (books read, music enjoyed) and a large group check-in.

COMMUNITY BUILDING

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Our in-person offerings have had strong attendance though of course many had limited spaces per CDC guidelines. Our first ever Plant Swap took place at a neighborhood tennis club and brought in over thirty members to exchange plants with one another. There was such enthusiasm for the event that we plan to host this annually in the fall. In November Tom Nunnenkamp and Lib Jones hosted over thirty members at their garden, Maple Walk, for a Pie Walk set to live music provided by John Burns and Rob Katz. Firepit Fun ran weekly for a few months and the team was excited to see that there were a few regulars each week along with predominantly different people for a good mix. There have been small group member-led visits to local museums that have been well received as well as a historic biking tour.

This year's team members were: Althea Clark, Chip Dickerson, Jeannie Fennell, Lisa Marie Nisely, Julie Prentice, and Bailey Reidinger.

Community Building Affinity Groups:

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

CONGREGATIONAL CARE

Annual Report 2020-2021
Submitted by Eve Stevens, Staff Liaison
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This year the Congregational Care Team has gone above and beyond even their usual attention to detail, compassionate and consistent outreach and show of thoughtful support for members in times of crisis and celebration, all this in spite of the fact that a number of team members have had their own significant experiences of illness and loss this past year. Members of the team are: Sage Brook, Craig Corzine, Annie Flint, Nancy Greene, Jane Kusterer, Sheila Lay (Chair), Judy Love, and Jan McNeely.

Sage Brook paid visits and made phone calls to members on a consistent basis who have struggled particularly with the pandemic and ongoing health issues. Craig Corzine gave rides to hospital visits and contributed meals. Annie Flint wrote and sent heartfelt monthly cards on behalf of the team promptly. Nancy Greene sent cards, delivered meals, made phone calls and paid visits. Jane Kusterer continued to take the lead on preparing and delivering delicious homemade meals as well as sending chalice magnets to members with ongoing concerns. Sheila Lay continued to organize the distribution of prayer shawls to members who have lost children and partners, made visits and phone calls, made and delivered meals, and gave rides to members in need. Judy Love made a baby blanket for our newest member and made and delivered meals. Jan McNeely has kept minutes, helped make organizing meal delivery more seamless, made and delivered meals to members.

This team continues to be an incredibly committed and organized group under the leadership of Chair, Sheila Lay. We have had conversations as a team this year about the importance of bringing in new team members to allow those who have done so much for so long to rotate off next summer. It is a gift to the congregation that these members remained during the pandemic and will continue into this year of transition back to in-person congregational life.

Healing Threads under the leadership of Kathleen Maloney-Tarr with Sheila Lay as liaison to the Congregational Care Team, began meeting at a social distance outdoors to continue knitting prayer shawls for our members, continuing to donate additional shawls to hospice.

In addition to the cards, meals, phone calls and visits every month in response to members in times of crisis and celebration, the team also partnered with the Family Ministry team to deliver a large number of meals to families in our congregation. The team typically sends between 30 and 40 holiday cards to members who have experienced loss in the past year and who have ongoing health troubles. This year, the team sent 94 holiday cards with personal messages.

CONGREGATIONAL CARE

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This year the Congregational Care Team:

- Made and delivered 2 baby blankets.
- Held 0 Memorial Receptions.
- Mailed approximately 200 cards to members.
- Mailed, in addition, 94 holiday cards to members with ongoing illness or who lost a loved one in the past year.
- Provided just over 60 meals to members in times of crisis.
- Provided, in addition, 19 meals to families in the congregation in times of particular challenge.
- Gave 4 prayer shawls to terminally ill or grieving congregants.
- Provided transportation for 6 members in need.
- Visited members 3-4 times a month.
- Donated 24 prayer shawls to Hospice.

FAMILY MINISTRY

Annual Report 2020-2021

Submitted by Eve Stevens, Staff Liaison

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Our Family Ministry Team started off the congregational year with a listening session with parents and people in the congregation working as teachers to learn more about the experience of families, children, and youth during the pandemic. We heard predominantly (and unsurprisingly) that families were feeling overwhelmed and burnt out from the hours of screen time spent at school and work each day. Amidst the overwhelm and exhaustion, families also reported feeling gratitude for how simplified life had become and the increased amount of time they could now spend together in the evenings and on weekends.

The team offered a few virtual offerings for families. One that was most enjoyed by the team and participants was a series of cooking and baking competitions in which families arrived on screen having made a dish using a number of required ingredients, described what they had made, the approach they took to using the required ingredients and how it tasted. The judges then rated each dish by presentation, creativity and use of the required ingredients. Even this event had low and then dwindling participation.

The team then pivoted to checking in with families, including sending hand-made cards to CYRE-registered families with personal notes acknowledging the challenge of this time and reminding them of the presence and support of their community. Team members also joined the Congregational Care Team in providing meals for a number of families who had particularly challenging situations.

Two Parent Discovery Circles continued to meet throughout the past year once a month. David Flynn and Donna Feely facilitated one group and Lisa Hagen and Bryce Nielsen facilitated the other. This proved to be a grounding experience that provided space for parents to vent and feel supported.

The team offered an in-person event on the lawn of the Mint Museum Randolph in the fall which had about five families in attendance. Attendees played circle games at a distance and then used recycled materials to create sculptures for a sculpture competition while the younger children had a chance to run and play together. Recently the team has attempted in-person events again with a family field trip to a local farm to pick strawberries and pet farm animals. There was a limit of 25 attendees to this event though more were interested. This summer, the team will host a monthly Sunday morning event for families during what is typically CYRE time.

We continue to have youth members on our team and this year's youth, Lilly Hagen and Alex Szanton, were particularly engaged and involved members of the team this year, giving sparks of creativity and insight when we have needed them most during a difficult year.

The Family Ministry Team members this year were: Lynne Friedheim, Melanie Greely, Lilly Hagen, Craig Harbold, Bryce Nielsen, Sophie Snyder, Alex Szanton, and Samantha Visco.

INTERSECTIONAL JUSTICE TEAM

Annual Report 2020-2021
Submitted by Jay Leach, Staff Liaison
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While this pandemic year with its demands for social distancing and limited interaction proved particularly challenging to our Intersectional Justice efforts, this congregational year continued to advance the approach to which the congregation committed in adopting our new Vision and Mission. This year's Team included Suzanne Lake, Megan Van Fleet, Rebekah Visco, Dave Walsh and Janet Zick. Jay Leach was the professional staff liaison to this Team.

Significantly, robust Core Groups continued in our virtual format. Eve Stevens led a group in exploring issues of Cultural Justice and Jay Leach provided leadership for our Economic Justice group. Now in its fourth year as an important part of our programming, we have recently noted that more than 80 of our members have participated in at least one Core Group (including two members—Margie Storch and Kathryn Whitfield—who completed their participation in all four groups this year!) We continue to see the impact these groups are making on our shared perspective, enabling more of us to understand the struggle for justice as both a systemic struggle and as one necessitating an intersectional approach.

While our Core Groups have thrived, we have had much less success with our Engagement Groups. These are made up of participants in prior Core Group experiences seeking to translate their learnings into ways for us as a community to participate with “co-conspirators” in the larger community in the intersectional struggle for justice. We are still trying to get traction on this approach and hope the coming year will at last present us with considerably more opportunities for our members.

Our unquestioned success this year was in co-conspiracy with the Reentry Housing Alliance (RHA), a new partnership identified by our Racial Justice Engagement Group. RHA is both an advocate for those coming out of incarceration and a resource for these individuals in their search for affordable housing. Through hundreds and hundreds of phone calls to landlords and property owners, UUCS members aided RHA in creating a housing database that identifies the places in our region open to renting to people with a criminal record. This is proving to be a valuable resource, even touted by the City of Charlotte as an invaluable aid in the affordable housing conversation here.

We now have some initial inquiries for additional opportunities. Members working on both Cultural and Environmental Justice issues are beginning to explore more deeply possibilities for the coming months. Again, we are hopeful that our array of possibilities can expand significantly in the coming year.

MEMBERSHIP

Annual Report 2020-2021
Submitted by Kelly Greene, Staff Liaison
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The Membership Team looks for ways to improve the welcoming and engagement of visitors, new members and existing members. Tara Anderson, Lincoln Baxter, Catherine Covington-East, Rita Heath-Singer, Linn Martin and Liza Pratt served on the Membership Team this year. Kelly Greene was the staff liaison.

Membership

- As of April 30, 2021, membership is 592, down from 606 at the start of the year.
- In the 2019-2020 congregational year, we added 31 new members. As of May 24, 2021, we have added eight new members in the 2020-2021 congregational year. Fourteen of these new members joined while we were not having in-person services.
- In the 2019-2020 congregational year, we removed 59 members. This was down from 70 removals the year before. Eight people had moved, three died, 21 resigned and 27 were Board removals. Five of the 21 who resigned had not asked to be removed until well after they had moved to different cities. As of May 24, 2021, we have removed 30 members this year. Five members moved. Ten died. Fifteen resigned.
- Please note that Board removals are still in process. Due to hardships experienced by some members during the pandemic and the lack of connection some may feel with only meeting virtually, the Membership Team contacted members who were no longer meeting bylaw requirements for membership. They invited these members to reconnect with UUCC. They will be contacted again with a similar invitation.
- In addition, throughout this time of not meeting in person, staff has regularly contacted members they have not noticed participating, with the purpose of these interactions being to show care and concern for members.

Visitors

- This congregational year, 80 visitors signed up to receive our newsletter. We recorded visitors commenting on the public Facebook group during services and accessing service from our Sunday morning eblast email. These numbers are likely missing anyone who went straight to our web site or YouTube channel. The number of visitors captured per month has ranged from approximately 20 to 67. We have approximately 2000 followers of our public Facebook page. Very few have contacted the Membership Coordinator directly or attended visitor sessions. A reduction in visitors has been noted for five years in a row. Those who commented on the Facebook page were sent a welcome message by the Membership Coordinator. All known visitors who receive our emails were invited to an in-person session with our ministers. Six attended.

Volunteering

- UUCC members continued to volunteer on leadership teams, as teachers for our children and youth, and as facilitators for adult groups. Volunteers also continued to care for our garden and grounds. Most Sunday morning volunteers and other support roles have not been used since March 2020.

MUSIC

Annual Report 2020-2021
Submitted by John Herrick, Staff Liaison
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The Music Team this year was comprised of Ben Schomp (chair), Kathy Allen, Susan McClelland, Janet Palmer, Patrick Sullivan, Nancy Wielunski, working with 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.

With virtual-only services and the need to video record music selections, creating music was a little more cumbersome this year than in years past. Virtual Adult Choir, Children's Choir, Handbell Ensemble and UUCC Band pieces (shout out to Ben Schomp for his amazing work with the band!) were time-intensive for all participants involved, but we were able to maintain a semblance of ensemble music making and keep many of our musicians engaged. Not all ensemble members were able to participate. We were able to enjoy a number of congregational solo musicians and the virtual format enable us to invite guest musicians from far away, such as Emma's Revolution this winter, jazz pianist Simon George last spring, singers Keith Kusterer and Cristina Pecci last summer and singers Ed and Rosanna Stokes in the fall. Charlotte area special musical guests included violinist Sabu Yamamoto, violist Matt Darsey, clarinetist Daniel Martinec, clarinetist Kinsey Fournier and soprano Emily Shusdock. Another key musical contributor this year was staff member and singer/songwriter Jessica Borgnis, who has served as our choir accompanist since last winter. Thank you to our many musicians who carried us through this year, inspired us on a weekly basis and who kept us in community with one another.

Music team initiatives this year include the weekly Zoom Tune Room on Wednesday nights, which invited congregational musicians to share music with one another over Zoom. Participation ranged from 15 to 35 participants. And while we were not holding in-person rehearsals this year, we held virtual sectionals each Wednesday evening to prepare for upcoming virtual recordings and to take time for check-in. If there is a silver lining this past year, it was that music program participants were given an opportunity to get to know one another better through these virtual meetings.

In-person rehearsals and activities are currently being planned for the summer to prepare us for a return to in-person services this fall.

SMALL GROUP MINISTRY STEERING TEAM

Annual Report: 2020-2021

Submitted by Eve Stevens, Staff Liaison

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The Small Group Ministry Steering Team (SGMST) is composed of our Discovery Circle facilitators Ellen Holliday, Sheila Lay, Mike Long, Linn Martin, Jan McNeely, Ron Spake with lead content writer, Camilla Mazzotta.

The team did a wonderful job adapting the roll out schedule for Discovery Circles as well as adapting this small group, personal sharing experience for Zoom. Camilla continued to create meaningful, quality opportunities for deep reflection and personal sharing which the team then edited and added to, to create the final session plan.

Session topics this year included: Our Second Principle During These Hard Times, Simple Gifts, Grace, and Breaking Bread.

Facilitators have marveled at the consistency of attendance this year and the quality of conversation. Participants seem in deeper need than usual for supportive, compassionate listening in community.

All three Discovery Circles decided to continue with the tradition of participating in a service project. One circle created personal homemade gifts and notes for every teacher and advisor in our Children and Youth Religious Education program, thanking them for their commitment in a particularly difficult year. The other circles made and delivered over 70 meals to Roof Above.

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

We had three regular Discovery Circles (one more than last year) and two Parent Discovery Circles (overseen by the Family Ministry Team) this year.

The team feels energized and motivated from this year's success and looks forward to retooling over the summer and offering another year of Discovery Circles with in-person offerings this fall.

WORSHIP

Annual Report 2020-2021
Submitted by Jay Leach, Minister
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For this year's Worship Team, professional staff members John Herrick, Jay Leach and Eve Stevens were joined by Louise Cleveland, Shelagh Gallagher, Carol Hartley, Michael Kelly, Ben Schomp and Erin Stody.

Confined as we were to Zoom meetings, this group gathered faithfully on the first Thursday evening of every month, sharing screen time together for approximately an hour-and-a-half.

The group offered both a macrocosmic perspective—reflections on our services in general—and microcosmic observations—comments about specific aspects of particular services. Over the course of the year, they helped enhance what we offered in our virtual services by providing much needed feedback and suggestions. Especially at a time when our professional staff was forced to venture far outside of their training and comfort zones, the insights and advice of this Team became of particular value during this congregational year.

This Team also approved a grant submitted to our Memorial Endowment Trust. Aware that a prior grant is enabling us to create a new pulpit and table for the platform area, this grant seeks funding for additional aesthetic enhancement to our sanctuary and to the vestibule immediately outside the sanctuary doors.

We are grateful for the gifts of time and insight provided this year by Ben, Carol, Erin, Louise, Michael and Shelagh. The whole congregation benefitted from your work.

DIRECTOR OF ADMINISTRATION REPORT

Annual Report 2020-2021

Submitted by Alesia Hutto, Director of Administration

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This is my first year in this role after being a part of this wonder staff for over 15 years. Despite being in a pandemic since March 2020, this congregation continued to thrive under the strong leadership of minister Jay Leach, with the support of second minister Eve Stevens. We continue to benefit from a committed professional staff and a dedicated and generous group of committed member volunteers.

Staffing

The 2019-2020 congregational year ended with staff transitions. Martha Kniseley, our dedicated and talented Adult Programming Coordinator and Doug Swaim, our smart and gifted Director of Administration retired on June 30, 2020. We also had members of our devoted support staff, Children's Choir Director, Donna Fisher and Sexton, Pete Parks also retiring. Pete Parks offered priceless support to both the UUCC and the Open Door School (ODS). They all provided an invaluable level of service and are truly missed. A celebration was held in their honor on June 26, 2020.

Our longest tenured staff member, Kathleen Carpenter, Director of Religious Education for Children and Youth retired on December 31, 2020. A celebration was held in her honor on December 18, 2020 which was attended by not only current members, but former CYRE youth and former members.

Overall Financial Picture for 2020-2021

In June of 2020, we adopted a budget that forecast an operating surplus for 2020-2021 of \$1,996. We have witnessed for several years, and again for 2020-2021, the UUCC is outperforming the annual budget. Although we faced uncertainties with the COVID-19 pandemic, it appears that there could be a net income of approximately \$130,000. This surplus is *only* due to underspending in programming, support and the postponement of hiring a children's choir director, an interim director of lifespan religious education and a sexton. Current member pledge income (current & prior year) was generally on budget, other income, rental, Sunday plate and new member income were all under budget due to the COVID-19 pandemic.

Payroll Protection Loan

A key part of the large stimulus bill that Congress passed at the end of March 2020 (CARES Act) was the Paycheck Protection Program (PPP). It allows small businesses and nonprofits, including congregations, to obtain forgivable loans that are to be used to maintain staff and payroll during the COVID-19 event. The loan amount is calculated at 2.5 times average monthly payroll expenses for 2019, and the loan can be "forgiven" if the recipient maintains and pays staff at 2019 levels during the crisis.

The UUCC applied for and received a \$173,000 loan under the PPP. We applied for the loan primarily because Open Door School lost all its income when it joined CMS in closing its doors in mid-March. By August 2020, I along with UUCC treasurer, Ron Maccaroni, submitted all the paperwork required to apply for forgiveness. Our PPP loan lender and current bank, Truist, officially approved the forgiveness of our loan in January 2021. This information was forwarded to the Small Business Association (SBA) for final approval which was issued in March of 2021.

DIRECTOR OF ADMINISTRATION REPORT

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Budgeting & Stewardship

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

Faced with the pandemic and an uncertain economy, the Stewardship Team continued to encourage generosity at the 5% level across the board and oversaw peer-to-peer canvassing efforts—contacting individual members about their pledges, all done virtually. Special efforts were made in acknowledging pledges through handwritten thank you notes, the mailing of handcrafts by our CYRE children and youth and the staging of virtual UUCU Member Appreciation Nights. New this year was the creation of monthly captains, who acted as “cheerleaders” by offering testimony and encouraging financial commitment and generosity. Stewardship Team members recorded monthly stewardship messages for Sunday services.

Despite our best efforts, this year’s campaign proved to be more difficult due to the pandemic. We have had several members increase their pledges, but those increases were more than offset by reductions from some of our more generous pledgers. New member pledges are also below budget given our closure. Other income lines such as Rental and Contributions-Other are also below budget. One of the bright spots in our financials is an increase in giving from pledging members. Considering all factors, we anticipate approximately a \$40,000 reduction in overall income for the upcoming congregational year.

At the Congregational Conversation on June 6th, the membership will be asked to adopt a deficit budget. We are anticipating an approximate \$40,000 drop in income for the 2021-2022 fiscal year which is why we forecast a deficit of approximately \$40,000. This year’s surplus leaves us in good shape to absorb the upcoming year’s deficit. If we end this year with a surplus of \$130,000 and end next year with the full projected deficit of \$40,500 our reserves will remain above \$250,000.

We must increase income in the coming fiscal year. We plan to reopen in September 2021 and through marketing we anticipate attracting new members. Our adult membership has slipped under 600. There are several reasons for the decline, societal trends, aging, some dissatisfaction with our “new direction” and of course the pandemic; however, one can also see the transition we are going through in a positive light: the total average member pledge continues to increase. We are in a favorable position.

MET Grant Program

Our endowment is now valued at well over \$1 million dollars and for the last several years has been funding important improvements and programs that would not have been possible through the operating budget. Without a doubt the Memorial Endowment Trust’s (MET’s) grant program is making a huge impact on the congregation. In this past year it has funded a much-needed repair and maintenance of our fellowship hall (Freeman Hall) roof, an electronic bulletin board and a rebranding effort which includes a new logo, colors, tagline, stationery and exterior signage, and the upcoming installation of hearing loops in the Bernstein room.

DIRECTOR OF ADMINISTRATION REPORT

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Launch of our New Website

During the summer of 2018 we began a process of “refreshing” the website with several goals in mind:

- making the website more useful for members, less oriented to “wanderers and seekers”.
- incorporate our new focus on intersectional justice.
- incorporate a newly formatted, web-based *Soundings*.
- incorporated our new branding and logo.
- updated photography.
- rely less on highly customized templates and in doing so take control over the design and management.

What we initially expected would be a three- or four-month project turned into a two-year project and in October of 2020 our new website was launched. Due to the dedicated work of the “Website Refresh Task Group” led by a talented staff-member, Belinda Parry who has assumed technical leadership of the effort, we were able to launch a new website that met all our desired goals with a refreshing look. It incorporates our new branding, logo and fonts, it also has a user-friendly interface that makes it easier for members to stay connected.

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 in my transition to Director of Administration--Barry Ahrendt, John Burns, David Flynn, MaryAnn Hendrick, Mike Long, Cyndi Martinec and Roy Smith. There are other volunteers who have been stellar in their support, I cannot list everyone, but you know who you are. I appreciate all that you do.

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

BUILDING AND GROUNDS

Annual Report 2020-2021
submitted by Roy Smith, Chair
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The Members of the Building and Grounds Team include Dick Kistler, Judy Love, Lee Martinec, Tom Moore, Charles Pilkey, Roy Smith (chair) and Virginia Sullivan. Alesia Hutto, UCC Director of Administration serves as staff liaison to the team.

Although we were in a pandemic for the entire congregational year, the Building and Grounds Team was very active this year. The team was able to hold two building and grounds workdays. The fall workday was held on Thursday, November 19 at 9:00 a.m. Attendance was held to just team members. The second workday, open to volunteers was held on Saturday, March 27 at 9:00 a.m. Through the hard work of the team members and a few volunteers, we managed to complete several projects. These projects include:

- Identified and stopped a leak that was occurring at the end of the office hallway. The work included clearing the drains in the gated area where our HVAC units are located. A thick bead of caulk was applied outside where the exterior brick wall meets the concrete pad to prevent water from coming into the stairwell. This will be an ongoing maintenance issue that we will address annually.
- Replaced the carpet in the elevator that was damaged due to a break in its Jack Seal.
- Upgraded the building's HVAC system with MERV13 filters.
- Removed five dead trees. Deadwood was removed over the playgrounds for safety and for the health of the trees.
- Mitigated five trees on the property to extend their lives.
- Waterproofed the two fences that house both the trash dumpster and the recycling bin.
- Repaired a roof leak on one of the Open Door School's shed.
- Repaired the steps of the fire escape leading to the two-year-old playground.
- Removed the old metal sign located at Gaynor Road.
- Sealed the holes in the foundation around where wiring and vents enter the building.

We also were able to complete the following outstanding grant projects that were funded by the Memorial Endowment Trust of the UCC:

- Repair and maintenance of the roof over Freeman Hall. This work included replacing the scuppers and replacing/repairing and painting the window stops.
- Installation of an electronic bulletin board in the vestibule.

The following grant projects are still outstanding as of the writing of this report:

- The exterior signage project is coming to close. The contracts have been signed and the permits have been requested. We are currently waiting to hear back from the sign companies with installation schedule.
- Installing hearing loops in the Bernstein Room.
- Completion of the new pulpit and credenza for the Sanctuary. We are very grateful for the hard work that former Building and Grounds team chair, Scott Royle has dedicated to this project.

BUILDING AND GROUNDS

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What is next?

- Install nosing on the stairs in the vestibule and display art donated our beloved member, Judy Ghoneim.
- Create a list of going monthly/yearly maintenance items to ensure that they are in the team's radar.
- Create an archiving system to maintain documents and historical information regarding the work of the team.
- Provide support for incoming MET grant projects as needed.

Roy Smith
Chair, Building and Grounds Team

COMMUNICATIONS

Annual Report 2020-2021

Submitted by Belinda Parry, Staff Liaison

page 1 of 1

The Communications Team was chaired by Joe Argent this year. Other team members were Dave Dixon, Lisa Lackey, Erin Manness, Paul Nisely, and Nancy Pierce and Scott Smith.

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

Due to the limitations placed on everyone as a result of the Covid 19 pandemic and our quick pivot to a mainly virtual presence, the Unitarian Universalist Community of Charlotte saw growth in traffic to the updated website, the UUCC's public and member Facebook pages, and our YouTube channel. The team began an assessment of our online and social media presence and are currently reviewing the UUCC's overall Communications Policy, as well as investigating expanding our virtual presence on other platforms such as Instagram and Twitter. These projects will continue into the next year.

Additionally, the team continues to provide feedback on the ongoing Focus 2020 project, including advising on signage, and we anticipate an increased focus on marketing tasks in the coming years.

FINANCE

Annual Report 2020-2021

Submitted by MaryAnn Hendrick, Chair

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The Finance Team for the fiscal year of 2020-2021 has been Chaired by MaryAnn Hendrick. Other members of the Finance Team include Mary Hackenberg, George Ladner, John Lee and Melissa Vullo. Alesia Hutto serves as the UUCC staff liaison to the Finance Team.

The Finance Team meets monthly, and the primary role of the Team is to monitor the financial operations of the UUCC. As a Team, we review the monthly financial statements including the UUCC Balance Sheet and the Profit and Loss Statement, sometimes referred to as the Statement of Operations. By monitoring the monthly financial statements, the Team considers how the income and expenditures of the UUCC are comparing to the annual budget approved by the UUCC congregation, as well as how it compares to prior year income and expenses.

We have witnessed for several years, and again for the 2020-2021 fiscal year, that the UUCC usually outperforms the annual budget. For the current (2020-2021) fiscal year the operating challenge has been greater because the UUCC faced the uncertainties of the COVID-19 pandemic. It appears that there will be a gain for the fiscal year that is expected to be approximately \$130,000. This is approximately \$128,000 more than what was budgeted. The very important budget process has been effective for many years and has proved to be more challenging with the year-round pledging. Neither the coordinating team nor the staff could have been prepared for the havoc COVID-19 would play with the budgeting process.

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

1. The Finance Teams spent a lot of time this year adjusting to the new reality of a different income structure. No rental income, no plate income, no reimbursements from Open Door School and inconsistent Pledge income.
2. The Finance Team did not spend as much time as normally expended on expense items. As the facility was not operational for the fiscal year, most operational expenses were nonexistent. Other than those utilities and maintenance needed for the basic sustainability of the structure, there were no operational expenses. The replacement and timing of personnel that had retired at the end of the prior fiscal and/or calendar year was discussed, and recommendations made as to timing of new hires based on the expected opening date of the facility.
3. Alesia Hutto kept the team informed of the progress of the Payroll Protection Plan application, receipt of funds, disbursement of funds and forgiveness of funds throughout the process.
4. The Finance Team reviewed the budget process with Alesia Hutto for a better understanding of how the budget was compiled, how the income and expense numbers were allocated to each period and what expenses were recorded monthly vs. quarterly. It was recommended that the Pledge Income be allocated based on prior year percentages rather than equal 12 monthly installments to provide a more realistic monthly accounting. Alesia Hutto adopted this method beginning with the September 2020 Financial Statements. Also, prior period monthly and year to date amounts have been added to the Financial Statement Profit and Loss statement for comparative purposes.

FINANCE

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5. The Finance Team reviewed the capital expenditure for tree maintenance, HVAC units and remaining funds in the reserve account to cover the Solar panels as well as the LED lighting from the prior year.
6. The Finance Team completed the internal financial audit of the Memorial Endowment Trust (MET) for the calendar year 2019. The internal audit for the MET for 2020 has not yet begun.
7. Each year the Finance Team discusses the disposition of any annual surplus with the Coordinating Team representative, and any potential uses of the Reserves. Alesia Hutto presented the team with a deficit budget proposal for the next fiscal year along with the anticipated surplus of \$130,000 from the current year. Also submitted was an outline for possible disbursement of the anticipated surplus. The Finance Team approved the allocation of the surplus funds to include funding the Reserve Account, Funding the anticipated deficit for the coming year, funding capital expenditures and funding personnel salary increases.

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.

Submitted by MaryAnn Hendrick, Chair of the Finance Team

THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE

2020 Annual Report 12/31/20

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The **Mission Statement** of the Memorial Endowment Trust of the Unitarian Universalist Community of Charlotte (**Endowment**) as established by the Endowment's Board of Trustees (**Endowment 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.

On December 6, 2020, the Endowment Board received approval from the congregation to amend the Unitarian Universalist Church of Charlotte Memorial Endowment Trust Agreement (the 2018 Agreement) to change its name to The Memorial Endowment Trust of the Unitarian Universalist Community of Charlotte (dated 2020) and to alter certain gender related verbiage. As required by the new 2020 Agreement, the Endowment Board submits the following annual accounting and report to the UUC:

Endowment Board Trustees

Mike Long, Chair
Patrick McNeely
Joy Bruce
Rita Heath-Singer
Tom Nunnenkamp

Legacy Society Membership

The Legacy Society consists of those UUC members who have designated the Endowment as a beneficiary in their will, retirement plan documents, life insurance or other legacy documents. As of December 31, 2021, there were 80 Legacy Society members.

Donor Development

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

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

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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Our publicity stresses several important facts about legacy giving:

1. Gifts to the Endowment enable the Endowment to increase the amount of grants it can make each year.
2. The Endowment is a charitable trust with tax advantages for donors.
3. Giving through estate planning does not affect one's income stream.
4. Giving through estate planning can be as simple as adding the Endowment as a beneficiary to a will, a life insurance policy, IRA, or other retirement plan.

Throughout 2020, the Endowment Board ran articles in Currents listing people who have donated to the Endowment and the names of the people in whose name the money was given. Due to Covid restrictions, the Endowment Board was unable to 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 Endowment. It plans to resume this practice when the Community begins to meet in person. Beginning in 2017, the UUA administered a Legacy Challenge Program which provided for a matching contribution of up to 10% of any new legacy gift commitments made to the UUCC or Endowment. During the campaign, which ended early due to an overwhelming response, 5 UUCC members made qualifying legacy gift commitments. As a result, the Endowment qualified for \$19,500 in matching contributions from the UUA to be paid over 4 quarters. The Endowment received the first installment in late 2019 and the balance of the payments were received in 2020.

During 2020, the Endowment received 52 gifts in memory of or to honor UUCC members or their families totaling \$5,590.00, received bequests from one estate for \$31,278.58 and it received \$14,625 from the Wake Now Our Vision Program, a program which matched increases in Legacy pledges. The total of the gifts and bequests for 2020 was \$51,493.58.

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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Contributions to the Endowment 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	\$31,828
2020	\$51,494

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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Financial Review and Investment of Endowment Funds

The Endowment Rules and Procedures require the Endowment Board to have a financial review of the Endowment accounts and records conducted annually by the UUCC Finance Committee or its appointee. During 2020 the UUCC Finance Committee completed its 2019 financial review and found the Endowment 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 Endowment'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 churches and UU endowment funds like the Endowment. 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, UUCEF invests according to socially responsible guidelines with at least 72% of the UUCEF managed by firms that apply Environmental, Social, and Governance (ESG) criteria or that screen out certain industries 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 endowment consultant and has low investment fees. The Memorial Endowment Board feels the UUCEF is the best investment option for the Endowment's assets.

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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Endowment Assets as of December 31, 2019

As of December 31, 2020, the Endowment assets consisted of \$1,025,121.71 in the UUCEF investment account and \$18,340.11 in a checking account for a total of \$1,043,461.82, which represented a 21.6% increase in the market value of the Endowment assets from 2018. The increase is due in part to the good performance of the financial markets and to the generosity of our UUCC members during 2019. A summary of the year end Endowment balances since 2002 follows:

End of Year Endowment	Account Assets
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	\$1,043,462

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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Endowment Grant Program History

The Endowment Grant Program began in 2015 following the approval by the congregation of the 2014 Agreement. The grant program is designed to ensure that the Endowment will be able to fund grants each year on a perpetual basis. Therefore, the Endowment is authorized to award grants to UUCC Teams or other recognized groups within the UUCC totaling up to 5% of the value of the assets in the Endowment Trust.

Grants are not to be used for expenses normally covered by the operating budget of the UUCC. Finally, grants can only be made in a calendar year if the value of the Endowment, less any proposed grants, exceeds \$600,000 as of the preceding December 31.

Originally, the value of the Endowment Trust 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 Endowment 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 provides a more consistent sum of money for grants each year.

Between 2015 and 2020, the Endowment has made 14 grants totaling over \$155,300 for various UUCC related projects designed to further the programs and purposes of the UUCC and that, hopefully, will have a lasting social or spiritual benefit. Projects funded by these grants include the sanctuary video projection system including the cameras used for live streaming, the purchase of furniture used by Open Door School and furniture for meeting rooms in the UUCC building, two different Undoing Racism workshops for UUCC members, the Freeman Hall makeover and most recently the 2019 re-branding and outreach project that led to our new UUCC name. These numbers do not include the grants announced for 2020.

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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2020 Grants

The generous support of past and present members of the UUCC allows the Memorial Endowment Trust to make grant funds available to the UUCC on an annual basis. The amount available is determined in January each year based on a formula specified in the Trust Agreement. The MET began its grant award program in 2015, protecting the corpus of the Trust while supporting important current needs of the UUCC not included in yearly operating budgets. Including this year's grant award of \$35,000, the Memorial Endowment Trust's total award amount has reached \$155,300 in grant monies for projects that support our faith community's vision and mission.

The four grants that were awarded this year included:

1. A challenge grant up to \$10,000 in support of the Open Door School's goal to serve a more diverse student population by providing meaningful scholarships to 10% of its students. The Trust's grant will be matched by the ODS community in order to grow the Sue Riley Fund.
2. \$12,000 for the Building and Grounds Team to complete the Freeman Hall Makeover Project. During the course of the interior Freeman Hall makeover, problems with exterior windows and structure were discovered in the oldest part of our building; this capital improvement is vital to protecting the oldest part of our facility.
3. \$10,000 for "hearing loops" requested by the Membership Team to assist our hearing challenged members' full participation in the life of our community. Hearing loops will be installed to broadcast directly to hearing aids and cochlear implants thus significantly improving sound amplification in both the Sanctuary and the Bernstein Room.
4. \$3,000 for a digital bulletin board requested by the Communications Team to enhance members' and visitors' awareness of current and upcoming activities in the life of the congregation. The screen will be installed in our vestibule.

Previous MET grants have included: Installation of the sanctuary projection system included livestreaming capability; Open Door School purchase of chairs for ODS and CYRE youth; Dismantling Racisms workshops, upgrades to our vestibule, interior signage and room furnishings; Freeman Hall makeover; and the process to align our name with our vision and mission, upgrade exterior signage to reflect any changes, and outreach efforts to connect with others in the wider community, both for potential new members and as partners in our justice work. The Endowment Trust's Board wishes to sincerely thank each of you for your generous support; we hope you are as delighted as we are about the many worthwhile projects the MET grant program has been able to support.

**THE MEMORIAL ENDOWMENT TRUST
OF THE UNITARIAN UNIVERSALIST COMMUNITY OF CHARLOTTE**

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2019 Revenues and Disbursements

A summary of the Endowment Revenue and Disbursements for 2019 is as follows:

Revenue		
2019 Income (Dividends and interest)		\$6,961.45
Contributions and bequests		\$51,493.58
Total Revenue		\$58,455.03
Disbursements		
Advisory fees	(\$8,642.27)	
Trustees' expenses (printing, stamps, insurance, etc.)	(54.75)	
Grants paid during 2019 (\$11,000 of 2018 grants)	(\$5,608.00)	
Total Disbursements		<u>(\$11,830.83)</u>
Excess of revenues over disbursements		\$46,624.20
Realized and Unrealized gains/losses in market value for 2019		<u>\$173,948.02</u>
Increase in Endowment assets for 2020		\$185,778.89

Other Memorial Endowment Trust information:

On June 30, 2020, Mike Long (Chair) will complete his second term on the Endowment Board, and Joy Bruce (Treasurer) will be leaving the Board after completing her first term. Rita Heath-Singer and Tom Nunnenkamp began their first term on the Endowment Board beginning July 1, 2020. Both have brought a wealth of experience and perspective to the operation of the Endowment.

We wish to thank you for your ongoing support and generosity.

Joy Bruce, Rita Heath-Singer, Mike Long, Patrick McNeely, Tom Nunnenkamp

STEWARDSHIP

Annual Report 2020-2021

Submitted by John Herrick, Staff Liaison

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

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

Despite our best efforts, this year's campaign proved difficult due to the pandemic. Monthly pledge response rates ranged from 45% to 78%, but with an average response rate of 65% (as of the writing of this report). While we had several members increase their pledges, those increases were offset by reductions from some of our more generous pledgers. New Member Pledges are also down given our move to virtual-only services.

As the team considers a strategy for the 2021-2022 campaign, it is considering our return to in-person services and programming as well as generational giving—how different generations respond to philanthropy and stewardship.

OPEN DOOR SCHOOL (ODS)

Annual Report 2020-2021

Submitted by Sheila Locklear, Director

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Overview:

Open Door School (ODS) is an outreach program of the Unitarian Universalist Community of Charlotte (UUCC); ODS resides in the education wing of the UUCC building during the week. The school relies on the active support of parents for their time, talents and fundraising contributions. This year marks Open Door School's 55th year of Progressive Education with Sheila Locklear as school Director.

This Year:

- This school year, our operation at Open Door School has been different due to the Covid-19 Virus. The school was closed in early March 2020 and reopened in January 2021 with limited classes and staff. We currently have 11 staff members instead of our usual 15. Using CDC Covid guidelines and input from both the UUCC and our Managing Team, the school developed a safety plan that was given to all staff and families to read, sign and follow. Among the restrictions are only UUCC staff and ODS staff and students are allowed in the building, all staff must wear masks while working, and each student must be screened before entering the school.
- The school ended the year with 55% enrollment (four classrooms vs. seven in a typical school year).
- The ODS scholarship fund awarded \$6,652 during the school year, distributed among eight children.
- In preparation for the 2021-2022 school year, for which registration began in January 2021, \$7,078 was transferred from the Fundraising account (money from the online auction) into the Scholarship Fund.
- Major fundraising efforts include (limited this school year due to Covid):
 - Harris Teeter Together in Education (ongoing).
 - Spirt wear sales (fall).
- A financial agreement of fair share between the school and the church resulted in ODS paying the church approximately \$14,000 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. This school year because of Covid we reopened with six classes. We had to suspend both of our 2-year-old classes due to poor enrollment. There are no children with diagnosed special needs/conditions. We have 11 children enrolled from diverse ethnic backgrounds. There are many bilingual or multilingual children enrolled. Families travel from 22 different zip codes to attend Open Door School.

Community Outreach:

- The following drives were *canceled* due to Covid-19 Restrictions:
 - Books for Promising Pages.
 - Canned goods for Loaves & Fishes.
 - Coats for at-risk elementary students in Charlotte.

Parent Education:

The Family Community Association (FCA) offers Adult Education forums. These events were canceled this year due to Covid-19 restrictions. Instead, an educational video developed by Suzy Moore, Office Manager and Sheila Locklear, Director, was offered.

OPEN DOOR SCHOOL (ODS)

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Maintenance:

- Work continues on ongoing minor repairs as needed and ongoing care of the ODS garden. Sheds and the fire escape were repaired by the UUCC Building & Grounds Team this year.

Monthly Happenings

ODS Staff, FCA, and Managing Team Meetings were held via Zoom this year.

June/July:

- Summer Camp was not held in the summer of 2020, but we are gearing up for 2021 Summer Camp and enrollment is near full capacity.

August-December:

- All classes, events, gatherings and meetings were not held due to Covid-19.
- Annual ODS beautification day was not held.
- Potluck picnic was not held.
- Free speech and hearing screenings through speech center were not held this year.
- Curriculum Nights to help parents understand Progressive Education were not held.
- The Annual Harvest Bake Sale before and after services at the UUCC was not held.
- Morning “Parent Coffee” hosted by the FCA was not held.
- Classroom Winter Potluck luncheons were held.
- Coat drive for Title One schools was not held.
- Promising Pages book drive was not held.
- Children’s Theatre preschool show was canceled this year.

January:

- In-house registration for the 2020-2021 school year began.
- Morning “Parent Coffee” hosted by the FCA was not held.

February:

- Annual Open House for 2020-2021 school year was replaced by a video and information on our website and Social Media.
- Morning “Parent Coffee” hosted by the FCA was not held.

March:

- Morning “Parent Coffee” hosted by the FCA was not held.
- 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.

OPEN DOOR SCHOOL (ODS)

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April:

- Morning “Parent Coffee” hosted by the FCA was not held.
- FCA recruited for members for the upcoming school year.
- Annual Spring Festival was not held.
- End-of-Year family surveys were collected via Survey Monkey.
- Founders Day was celebrated, and the children had their annual parade around the traffic circle.
- Class photos were not taken by ODS teacher and professional photographer, Suzy Moore.

May:

- Morning “Parent Coffee” hosted by the FCA was not held.
- End-of-year classroom ice cream parties were not held.
- Staff cleaning week.

Open Door School is still strong in the progressive philosophy promoted by the late Sue Spayth Riley. We are working hard to make sure this experience is available to children and families of all walks of life in the future. Enrollment for the upcoming 2021-2022 school year looks promising at 98% or above with most classes having lengthy waiting lists.