



# Annual Report FY 2022-23

Annual Meeting: May 21, 2023



*Image: Word Cloud derived from Listening Sessions (L. Mauck)*

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

- Adult Spiritual Development Team
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- Connections and Membership Teams
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- Pastoral Care Team
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- Sunday Volunteers: Usher & Greeter Teams
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- Worship Team
- Elected Officer Nominees for FY 2023-24
  - Board of Trustees
  - Endowment Committee
  - Leadership Development Committee
- Draft Budget FY 2023-24

**Unitarian Universalist Fellowship of Central Oregon  
Annual Meeting  
Sunday, May 21, 2023 – 11:15 a.m.**

61980 Skyline Ranch Road  
Bend, OR 97701  
(and Zoom)

**FY 2022-23 Annual Meeting Agenda**

|   |                        |
|---|------------------------|
| Call to Order   | Laura Voisinet         |
| Chalice Lighting  | Marean Jordan          |
| Opening Remarks   | Laura Voisinet         |
| Recognition of Outgoing Board Members   | Laura Voisinet         |
| Ministerial Review  | Carolyn Tate           |
| Nominees for Elected Positions<br>Board Nominees<br>Endowment Committee<br>Leadership Development Committee | Leadership Development |
| Nominations from the Floor  | All                    |
| Treasurer's Report  | Fletcher Chamberlin    |
| Proposed Budget FY 2023-24  | Fletcher Chamberlin    |
| Explanation of Voting   | Laura Voisinet         |
| Closing Words   | Laura Voisinet         |

## UUFCO ANNUAL MEETING MINUTES:FY 2021-2022

**Annual Meeting**  
**Location: Sanctuary and Zoom**  
**May 29,2022**

Minutes by Ella Chatterjee, Board Secretary

Meeting called to order by Daelene Schwartz, Board President, at 11:15

Rev. Rudolph lit the chalice and offered some opening words.

Daelene Schwartz spoke of how the congregation has grown and changed in the past five years. New members now form 50% of the current membership. The pandemic disrupted in-person gatherings and so it is difficult to know what new and older members would like to see from their church. For these reasons, the Board decided to work with Laura Park of Unity Consulting (a program of Unity Church – Unitarian, St. Paul, MN) to get in touch with the congregation. Laura developed the Nested Bowls concept, where a congregation first establishes values, then layered on the values are the church's mission and finally layered on and growing out of the mission are the ends the congregation would like to reach. To begin this process, Laura worked with the Board to set up small group listening sessions which were attended by some 130 members, where members expressed their dreams and hopes for the future of the congregation.

Laura Voisinet, then Vice President of the Board, explained how the notes taken from the many listening sessions were analyzed and organized by a data team. She showed the word cloud that had emerged from all of this information. Values that were expressed at least four times were included in the cloud. The most prominent one was connection. Other values that showed strongly in the cloud were openness, community, inclusiveness, and support.

Using all the information gathered from the listening sessions, the Board worked with Laura to determine the values, mission, and ends that emerged from the listening sessions. The values that emerged were: Courageous Love, Reverent Wonder, Authentic Engagement.

The Board found that the mission emerging from the sessions was not changed from the mission we had already identified: Together, we find meaning, celebrate life, and serve the spirit of love and justice in the world.

Finally, eight Ends emerged:

The people of UUFCO, across the generations, together

- Experience awe and wonder, and grow in spiritual depth and practice.
- Articulate our Unitarian Universalist identity, understand our covenantal faith, and live it courageously in the world.
- Engage our children in a lived experience of Unitarian Universalism and faith development.

- Ask for, receive, and generously give compassionate care during times of joy, sorrow, and transition.
- Build a community for all ages where we develop and expand anti-racist multicultural commitments.
- Create an ever-wider and inclusive circle of belonging.
- Contribute time, talent, and treasure to sustain and steward the fellowship.
- Engage in our fellowship's work for social justice and focus it for impact and clarity.

Grace Kennedy spoke of how these ends can be realized. Meetings will be conducted with the Leadership Development Committee and with all other committees to see how the ends can be incorporated and achieved in their work.

Fletcher Chamberlin presented the proposed budget for the year 2022-2023, which was sent to all members with the announcement of the annual meeting. He noted that the revenues have doubled in eight years and that the economic health of the fellowship is strong, largely due to the generosity of the fellowship in meeting pledge campaign goals. The Finance Committee again proposes a balanced budget, which allows for some increase in staff compensation and dedicates \$12,000 to social justice programs.

Judy Hurlburt gave a report on the Sacred Grounds. Work on this project began in late 2020. There are now two completed areas with connecting paths: the bell sculpture and the Embrace sculpture. Work will be done to provide a means of placing memorials on the Embrace sculpture, much as bells were placed on the bell sculpture.

Linda Johnson of the Leadership Development Committee (LDC) noted that Michael Carr and Amy Falkenrath will be leaving the LDC. She thanked both of them for their steadfast and wise service on the committee.

Linda discussed the criteria for the positions to be filled this year and explained how nominations could be made from the floor, in person or on Zoom.

Gwen Baker-Yuill reported on the nominations for this year's open Board positions. The nominees are John McKee for Vice President, Laura Voisinet for President, Daelene Schwartz for Immediate Past President, and Robert Hedeem for Member At-Large. Continuing Board members are Fletcher Chamberlin as Treasurer, Ella Chatterjee as Secretary and Grace Kennedy as Member At-Large.

The nominees for LDC are Marean Jordan for Seat 4 and Susie Hickman for Seat 5. Continuing LDC members are Linda Johnson at Seat 1, Sallie Neillie at seat 2, and Gwen Baker-Yuill at Seat 3.

After 15 minutes were allowed for nominations from the floor, the nominations closed.

Daelene Schwartz explained voting by email, noting that each member would receive confirmation when their ballot was successfully cast. Daelene noted that Mark Steinberg and John Lawton are leaving the Board. She thanked them for their dedicated and resourceful service during a difficult period.

Rev. Rudolph made closing remarks and Daelene Schwartz adjourned the meeting at 12:10 pm.

As of 5pm on May 31,2022, 164 ballots were cast by email. The nominees for the Board of Trustees and for the Leadership Development Committee were approved unanimously. The proposed budget for FY2022-23, was approved by a majority vote. The revised language of Bylaw 3.01, which eliminates the lower age threshold of membership, was approved by a majority vote. The revised language of Bylaw 4.06, which permits congregational voting to occur by written ballot or email without requiring a resolution by the Board, was approved by a majority vote.

# Annual Reports of Staff, Committees, and Teams

## Ends Statements of UUFCO

A word of explanation about this year's Annual Report. Our Leadership Development Committee requested that all reports submitted for this year's Annual Report reference the eight Ends Statements that emerged after the Listening Sessions conducted in the winter of 2022.

These Ends Statements are as follows:

- 1) Grow in spiritual depth and practice.
- 2) Articulate our Unitarian Universalist identity and understand our covenantal faith.
- 3) Engage our children in a lived experience of Unitarian Universalism and faith development.
- 4) Ask for, receive, and generously give compassionate care during the times of joy, sorrow, and transition.
- 5) Create an ever wider and inclusive circle of belonging.
- 6) Contribute time, talent, and treasure to sustain and steward the fellowship.
- 7) Develop and expand antiracist, multicultural commitments.
- 8) Embrace our fellowship's work for social justice and focus it for impact and clarity.

***Please refer back to these Ends as you read this report,  
as they will be indicated numerically in the various reports.***

### **SABBATICAL TASK FORCE ANNUAL REPORT 2022-23**

(in lieu of minister's report)

*Submitted by Susan Kinney*

In preparation for Reverend Scott's planned sabbatical beginning April 1, 2023, the Board elected to appoint a Sabbatical Task Force. The scope of the task force's work is to support staff, the Board and congregational teams and committees during the minister's absence. Members of the team are Bob Barber, Marean Jordan and Susan Kinney.



**PRESIDENT'S ANNUAL REPORT 2022-23**  
*Submitted by Laura Voisinet, Board President*

**Board of Trustees:** Laura Voisinet (President), Daelene Schwartz (Past President), John McKee (Vice President), Ella Chatterjee (Secretary), Fletcher Chamberlin (Treasurer), Bob Hedeem (member at large) and Grace Kennedy (member at large)

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

**Accomplishments**

- The Board appointed a Ministerial Review Committee consisting of Past President, Vice President, at-large Board member and a congregational representative. This first biennial review of our settled Minister Rev. Scott Rudolph was conducted as outlined in our Ministerial Review Policy of Chapter II of UUFCO's Board Policy Book. Using the Unitarian Universalist Minister's Association's *Fulfilling the Call Handbook's* list of nine principal duties, Rev. Scott Rudolph gave a self-evaluation while stakeholders, congregants, and staff performed a comprehensive evaluation. A summary was given to the Board, and another will be given to the congregation at the Annual Meeting. (Ends Statements met 1,2,6)
- The Board appointed a five-person Sabbatical Taskforce for the purposes of planning and preparing for Rev Scott Rudolph's Sabbatical April 1 – August 31, 2023. (Ends Statements met 1,2,6)
- With two years of planning by Environmental Justice and the Board, an ambitious Solar Panel Project was launched after congregational approval in April for a capital expense exceeding 25% of UUFCO's annual operating budget. Solar installation is slated for July 2023. (Ends statements met 1,2,6,8)
- The Board continued throughout the year on Policy Review, aiming for one third of its total policies, while also adopting new policies as needed. (Ends statements met 1,2,6)
- The Board in conjunction with the Leadership Development Committee continued refining the results of UUFCO's Listening Session project in winter 2022 and how the resulting wishes and values of the congregation mesh with our stated vision and mission. (Ends statements met 1,2,6)
- The Board appointed a Finance Research team tasked with planning for the continued growth of our congregation as it relates to finance committees, financial practices, accountabilities, intersecting programs, staffing and communication. The work of the Finance Research team will continue into the next year. (Ends Statements met 1,2,6)

**Future Plans**

- The Board will migrate its Governance Policy Book to an easily modifiable web-based version, so the most current versions of policies and bylaws are accessible. (Ends statements: 1,2,6)

- The Board will conduct a review of Bylaws, especially 4.05 and 4.06 to assure these still meet the goal our UU 5<sup>th</sup> principle - using the democratic process within our congregation in conducting business in our post-Covid society. (Ends Statements: 1,2,6)
- The Board will support our Widening the Circles Study Group as they continue to guide the congregation toward a deep understanding and agreement around the proposed UUA Article II Revision and/or UUFCO 8th Principle adoption. (Ends Statements: 1,2,3,7,8)
- The Board will continue to support the Finance Research team and will consider any recommendations that may emerge from their work. (Ends Statements: 1,2,6)

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

- Daelene Schwartz, Past President
- Fletcher Chamberlin, Treasurer
- Ella Chatterjee, Secretary

Respectfully submitted with deep appreciation for all of you,  
*Laura Voisinet*

## UUFCO Staff Reports

### FELLOWSHIP ADMINISTRATOR ANNUAL REPORT 2022-23

*Submitted by Leora Mauck, Fellowship Administrator*

**Purpose:** Administer the business of the church including budget management, insurance, purchasing, human resources, and fellowship communications. Provide graphic design support to staff, committees, and teams, including coordination with outside printers, and act as web master. Act as bookkeeper to process payroll, providing financial reports, administer the financial aspects of the pledge drive, and oversee the day-to-day bookkeeping. Provide direct supervision of the Event Manager, Facilities Manager, Janitor, AV Technicians, and Assistant Bookkeeper.

#### **Accomplishments**

- Welcomed AV Technicians Nolan Canady, Lio Ditta, and Danny Callen.
- Worked closely with Stewardship Committee on the design for the annual pledge drive, and supported the campaign with record keeping, reporting, and communication with congregants.
- Led the hiring process to bring onboard our new event manager, Shanda Johnson.
- Continued liaison with A Child's Garden preschool.

- Continued co-leadership of the Roundabout Sub-Team which includes collaboration with the developer, City, surveyors, and various teams at the Fellowship leading up to the construction of a roundabout at the intersection of Skyliners and Skyline Ranch in 2024.

### **Future Goals**

- Implement comprehensive social media strategies to grow our younger audience.
- Re-envision and implement new website navigation and several new pages to support additional interaction by existing and new congregation members.

## **CONGREGATIONAL LIFE FACILITATOR ANNUAL REPORT 2022-23**

*Submitted by Chela Sloper, Congregational Life Facilitator*

**Purpose:** To facilitate and support a community of welcome, appreciation, service and life-enhancing connections among congregants; schedule and support congregational events and celebrations; establish and maintain opportunities for connection among congregants, including various small group meetings and good times activities; oversee and support the Membership Team with orienting friends of the congregation to become members; oversee and support Sunday Volunteers. (2,5)

### **Accomplishments**

During FY2022-23 I strove to ensure the rhythm of our UUFCO program year moved forward. Though UUFCO did a great job of holding it together from March 2020 till October 2021 – when we cautiously and incrementally returned to being together – the momentum of our congregation, especially under Rev. Scott’s leadership, was interrupted. Beginning in August 2022 it was important to have as many of our traditional congregational events as possible. I couldn’t have gotten that train moving without the dedicated volunteers who shared ideas, energy and time to make sure we had a variety of ways to be together. (5)

- **SUNDAY VOLUNTEERS**

- **Ushers & Greeters.** Jerry Regan continued to masterfully oversee the schedule of ushers and greeters this year, having established a method for sign-ups and finding substitutes if unable to serve. The greeters will always provide “the first impression” for newcomers, and the ushers continue to contribute to the sense of order and safety in the sanctuary. This year we organized a meeting with our Bend law enforcement; we were instructed to call 9-1-1 in the event of any emergency as well as any disruption by a visitor that would not de-escalate.
- **Coffee & Kitchen Clean-Up.** Joyce Sayle has stepped forward as Team Lead to help make the Kitchen Clean-Up volunteer role clearer, less daunting for new volunteers, and a friendly avenue toward meeting other congregants. Kristina Ziegler continues to oversee the coffee crew and our coffee supplies.

- SMALL GROUPS

- An exciting development in UUFCO is the emergence of the **Men's Fellowship** gatherings. A multi-generational steering team was formed under the leadership of Bob Barber and Mark Dierbeck, and also included Curt Dawn, Ted Keener, Jeff Belzer, and Ben Huff. They are bringing more clarity to the men's small groups and planning monthly gatherings. (2,5,6)
- **Soul Matters** continues to provide spiritual nourishment for personal and small group reflection. Four Soul Matters small groups met via Zoom or in person throughout the year, thanks to these dedicated facilitators: Bob Barber, Diane Pietrzak, Ginny Contento, and Leslie Koc. Currently, our Soul Matters distribution is at 160. (1,2,5)
- After my holding the baton of **Fill Your Cup** for many years, Ellen Peterson has happily agreed to carry it forward, along with the help of a newcomer, Dean Harris, and other participants in the group. (5)
- A new **Redmond Coffee Group** has formed with Carol Carlson as the primary organizer, meeting first on Monday mornings, and then moving to Tuesday mornings, as different locations were tried. (5)
- The **XYZ Group** – embracing Millennial, Gen X, Gen Y, Gen Z folks – had several gatherings during the year, with new leadership of Tricia Merritt and Gaby Verderber. The group is using a connections platform called Discord to facilitate planning conversations. (2,5)

- EVENTS

- We held our fourth annual **Winter Solstice** celebration which enjoyed the full range of audience participation, without the restrictions and cautions observed last year. This remains an annual celebration led by Dana Regan, and includes opportunities for congregants of all ages to participate. (1,3,5)
- More than 20 folks from UUFCO – ages ranging from early teens to early 80's – and a dog! -- endured the cold to walk in the **Bend Christmas Parade**. We wore Santa hats, sang songs as we walked, and enjoyed the after-party with hot chocolate and snacks at the home of Bake & Rachel Baker. (2,
- Our **Winter Variety Show** was once again a big hit, as we gathered for an easy crowd-pleasing spaghetti dinner, and then *retired into the parlor (sanctuary)* to enjoy the oft-hidden talents of our members, friends, and young ones. (3,5,6)
- Our second annual **Pi(e) Day** was held on Sunday, March 12, both delicious and reminding us how to calculate the area of a circle. (5)
- The **Spring Women's Retreat** was a half-day celebration of beauty. All participants were invited to share up to three photos of something they found beautiful, especially in their homes. (1,2,5,6)
- The **Eugene Gay Men's Chorus** joined us for the second year at the end of Central Oregon's Pride celebration. They performed Saturday night, and added music and sparkle to our Sunday morning worship service. (5,8)

- **GOOD TIMES ACTIVITIES**

Good Times are any gatherings that draw congregants together to *celebrate life* in life-enhancing, fun, social, or outdoorsy ways. Many of our pre-pandemic Good Times activities continued after resuming when the “coast was clear”, including: **Camping Group, Card Night, Circle Suppers, Hiking Group, Numero Uno Book Group, Paddlers, and Movie Night.** (5,6)

New this year are:

- **Knitting Group:** Erika Beard-Irvine is the organizer for this stitchery group that meets every Saturday morning.
- **Dungeons & Dragons:** Nathan & Stef Jenkinson have cast a wide net to enjoy this popular TTRPG (Table Top Role-Playing Game).
- **Who Are We Discussions:** Attempting to have low impact social gatherings, we provided a general life-story prompt (e.g., what was your favorite concert ever attended?).
- **3<sup>rd</sup> Sunday Suppers:** Judy Hurlburt and Alice Elshoff launched a monthly opportunity to have a simple, healthy supper with a nominal fee to allow congregants to meet one another and enjoy a meal *without an agenda or program.*
- **Cribbage Group:** Rotating among different homes, cribbage players began meeting monthly.
- **Pet-Sitting Co-Op:** Marge Lee and Mark Dierbeck started a pet-sitting co-op that includes monthly meet-and-greets – so that both humans and dogs could get acquainted -- with a view to meeting one another’s pet-sitting needs when traveling or other circumstances require care for our beloved pets. This is a great model, as it includes the pleasure of sharing time with our pups, as well as offering service to one another.

### **Future Goals**

- **Neighborhood Groups.** As we seek to build stronger community ties, it may be time to make another approach to neighborhood fellowship groups, so that congregants can spend some time together in locations other than UUFCO. This will require designated leaders who will be willing to either host a monthly meeting, or assume the responsibility to secure monthly hosts.
- **Utilizing New Talent.** Discover new talent and interests in individuals who will offer brief educational or fellowship-focused opportunities.
- **Event Leadership.** Recruit individuals – or teams – who are willing to “adopt” different congregational events, with a clear plan of passing the baton to successors, will ensure these events’ inclusion in our congregational calendar for years to come.

## DIRECTOR OF RELIGIOUS EXPLORATION ANNUAL REPORT 2022-23

*Submitted by Amy Brock, Director of Religious Exploration*

**Team Members:** Anne Wieman, Carrie Bonnett, Eliza Lewis, Erika Beard-Irvine, Dustin Fanning-Painter, Jaz Halberstadt; Amy Brock, Director of Religious Exploration, Chair.

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

### Accomplishments

- This year, Religious Exploration provided classes for K-12th grade using the Soul Matter's curricula and differentiated instructional methods. Young people in the RE program explored spirituality through UU ritual, values, stories, songs, art, and science experiments. Older youth explored the concept of UU values and belonging from the Coming of Age curricula along with Christianity, Buddhism, and Pagan faiths. Our youngest children (infants through pre-k) had the opportunity to access spiritual exploration through connection with wider community in UUFCO learning spaces with their parents. These learning opportunities were made possible by dedicated volunteers and staff. (End Statements met: 1,2,3,4,5,7,8)
- We conducted Our Whole Lives - A Comprehensive Sexuality Education Program for grades 7-9 in the fall and grades 4-6 in the spring. This curricula is extensive and complex as it guides young people to a greater understanding of how their values influence sexuality in the world. Because of the extensive nature of these programs, it is rare to host two in the same program year without an OWL specific program team. The RE team is grateful for the volunteers and staff who went above and beyond to ensure our young people who were impacted by the pandemic were still able to receive this important part of their religious education. (End Statements met: 1, 2, 3, 5, 6, 7, 8)
- RE Team members supported youth with collecting toys for Ripple Project Toy Drive in the winter. They successfully collected multiple boxes of toys for children in the Bend community. The RE team also supported youth inspiration to expand on the congregational "Ripple Project". Each youth was given \$5 as part of this project. They combined their funds to purchase pizza to sell. They took those funds and hosted a coffee shop experience to expand funds further. Overall, the youth collected \$276.74 which was donated to The Father's Group and Every Child Oregon as part of UUFCO's GCC campaign. (End Statements met: 1,3,5,8)

### Future Goals:

- Support RE in becoming a thriving community for families of all ages to explore faith development together. (End Statements: 1, 2)
- Collaborate with families to create exploration experiences that support the faith development needs of young people with guidance from UUA approved developmental resources. (Ends Statements: 1, 2, 3, 6, 7)

- Support teens in building community and connection with those who hold shared values both within and outside of our UUFCO walls. (Ends Statements: 1, 2, 3, 8)

**Challenges:**

- Time is the biggest challenge for our families and volunteers. Our young people are busy people and it can be hard to find time that works for everyone to engage.
- Volunteer capacity is another challenge. None of our programs for young people are possible without adequate support from safer congregations approved adults.
- Connection is also a challenge as it can sometimes be difficult for adults, teens, and children to form new relationships and explore new experiences together.

**EVENTS MANAGER ANNUAL REPORT 2022-23**

*Submitted by Jonathan Beil, Events Manager*

**Purpose:** The Events Manager manages all aspects of private rentals; scheduling, contracts, staffing, set-up/breakdown, janitorial, and event inventory.

**Summary:** The fiscal year of 2022 has been extremely successful. The demand for private rentals has exceeded expectations. Private rentals have become more diverse, the building is serving a broader community, and UUFCO is becoming recognized as one of Central Oregon’s premier wedding facilities. The online advertising campaign has improved UUFCO’s online presence, and we are seeing significant returns on the investment. The growth within private rentals has not been without its challenges. Staffing continues to be difficult and as demand for private rentals and church usage grow simultaneously, there will be more calendar conflicts. Ultimately, the private rental department is succeeding in its mission to build community and generate revenue through private rental income.

- **Serving the Community** – UUFCO’s presence as a venue that serves the community is growing. UUFCO is consistently rented by some of Central Oregon’s most established non-profits for fundraising galas. UUFCO regularly hosts Red Cross blood drives, the League of Women Voters of Deschutes County, Bend La Pine School functions, the Central Oregon Youth Orchestra rehearsals, High Desert Chamber Music performances, celebrations of life, and many more smaller community-driven events.
- **Weddings** – Weddings have the potential to be the most significant financial contributor to private rentals. Building a strong reputation in the wedding industry takes time and money. With the support of the church, I have been able to implement an online advertising campaign. By significantly improving our online presence, UUFCO has received over 100 wedding rental requests since November 2022. Last fiscal year I sold 5 weddings, so far, I have sold 9 weddings for the 23-24 season with more to come. In the next month, I plan to revise and simplify the wedding package billing to ensure UUFCO can maximize profits and remain a top wedding venue.

- **Environmental Policy** – One of the first departmental changes made when I first arrived was drafting an environmental policy which prohibited the use of single-use disposables (including all plastics and bottled water) and requiring all renters to compost. The Board chose to endorse this policy and invest in our inventory of reusable tabletop items so we could provide all guests with china, flatware, and glassware at no additional cost. The success of this policy is hard to measure when you consider all the events over the past four years in which no plastic forks, or cups, or disposable plates were used.

### **Future Goals**

- Host more performance art, concerts, and recitals.
- The goal of booking 10 weddings per fiscal year remains.
- Expand and train new staff.

## **FACILITIES MANAGER ANNUAL REPORT 2022-23**

*Submitted by Parker Doelling, Facilities Manager*

**Purpose:** Maintain, clean, repair, and preserve a safe and welcoming facility and the systems and equipment within by working closely with our numerous contractors, Facilities Systems Committee, staff, volunteers, and other committees.

### **Accomplishments**

- Upgraded the WIFI system! It is lightning fast now and can accommodate large events.
- Installed a new security camera at the property entrance for a multitude of reasons.
- Got a baseboard heater installed in the Conference room.
- Replaced all door sweeps and weatherstripping on south facing doorways.
- A great facelift on several building faces thanks to Dan with Allied Painting.
- Made some major organizational improvements on the audio-visual system.
- Transitioned all our building maintenance work order tracking to a software called Asana.
- Repaired, cleaned, and revitalized the projector screens which suffer from ‘plasticizing’.
- Worked hard to consolidate and organize our church computer inventory.
- I now have most of our preventative maintenance streamlined.
- For the most part our systems have proven to be robust this last year and there have been few failures that have negatively impacted gatherings and events.
- Welcomed George to the team! He’s been doing janitorial as our building usage has now surged in a positive way.

### **Future Goals**



- Further expand the building tasks and organization within the ASANA software
- Update aspects of our AV system for reliability
- Build consistency in the building and grounds committee
- Stay on top of our fire preparedness
- Increase congregant participation in keeping our facilities in a healthy condition

**Challenge:** Finding and keeping contractors!

## **MUSIC DIRECTOR ANNUAL REPORT 2022-23**

*Submitted by Randy King, Music Director*

**Purpose:** We add color and beauty to the life of our fellowship by creating a family of singers and musicians who lead us all in worship.

### **Accomplishments**

This year the music team came together in the most incredible way. Not only have we survived, but we are thriving! Our choir is growing and we are running out of copies of music. This is a wonderful problem. We are not only growing numerically, but spiritually as well. Anyone is welcome to come to a choir practice and witness the joy we share, and also the extremely hard work our choir puts in every week to bring inspiring music to our fellowship.

### **Goals**

Continue to build a graded choir program that starts with school aged singers all the way to adult singers. By working with families, we will create a time and place for rehearsals and a schedule of Sundays the youth choir will sing.

### **Challenges**

Music is reliant on audio and visual equipment. We have experienced some challenges recently and there is a plan in place to address these issues. The music team works closely with the AV team and we'd like to strengthen this collaboration in the future. Another challenge is in making the music sound it's best both live and on Zoom.

## Reports of Teams and Committees

### ADULT SPIRITUAL DEVELOPMENT TEAM ANNUAL REPORT 2022-23

*Submitted by Kathleen Harrington, Chair*

**Team Members:** Kathleen Harrington, Chair; Alan Hilles, Susie Hickman, Toni Colotte

**Purpose:** The Adult Spiritual Development Committee supports our members and friends in exploring the diverse paths of their spiritual growth.

#### Accomplishments

- This year our committee sponsored a Saturday Workshop with Dr. Michelle who assisted our members to consider ways to enhance their physical, emotional and spiritual self-care. (End Statements met: 1,5)
- The team also sponsored an evening workshop which explored the history and practical applications of the ancient Chinese wisdom tradition of the E-Ching. (End Statements met: 1, 5)

#### Goals

- This coming year the Adult Spiritual Development Team is planning several four-week workshops on aging and spirituality. (End statements: 1, 5)
- In addition, the ASD is exploring the possibility of providing our members and friends with several presentations on plant medicines and their connection with spiritual growth. (End statements: 1, 5)

**Challenges:** No foreseen challenges.

### ART RESOURCE TEAM ANNUAL REPORT 2022-23

*Submitted by Sue Wilhelm, Chair*

**Members:** Virlene Arnold, Ellen Atkin, Paul Bennett, Barbara Cella, Linda Wetzal, Anne Wieman, Kristina Zeigler; Grace Kennedy and Sue Wilhelm, co-chairs

#### Mission (Purpose):

Our mission is to bring Art to life within UUFCO and to engage members and the greater community in harmony with our UU values.

#### Accomplishments

- This year our team was excited to engage our children in a lived experience of Unitarian Universalism and faith development through these multi-generational activities and events: "Washed Ashore" movie on April 28; RE/ART cooperative service ("Trash Talking") on May 7; Art

for All event - Making Art from trash on May 13; Kid's participation in the "Plastic Pollution Palooza" Art Exhibit 6/4/23 - 8/6/23.

- This year (and every year), our team worked and planned exhibits intended to create an ever widening circle of belonging. The "Plastic Pollution Palooza" and related events are linked to Environment and Social Justice concerns. We enlisted the help of the movie group to play our introductory movie. We have scheduled another social justice themed show for October -- "The Colors of Culture." The majority of our shows are open to the Central Oregon community and bring many new faces to our building.
- Our team enthusiastically contributes time, talent, and treasure to steward and sustain our fellowship. We are proud of our regular and intriguing changing exhibits and consistent community outreach. We are also happy to share that with Art sales and the resulting artist donations, we bring in more money than is budgeted for our work, and so we contribute financially to the Fellowship as well.
- We have added 3 new Team members. We have reorganized the Team tasks and divided responsibilities more equitably.

### **Future Goals**

- We will continue to embrace our Fellowship's work for social justice and focus it for impact and clarity. As stated above, the next 2 exhibits directly speak to this goal: The "Plastic Pollution Palooza" and the "Colors of Culture" shows are 2 examples.
- We will continue to create an ever wider and inclusive circle of belonging by: offering open community exhibits and events, as well as multi-generational opportunities like the annual Art for All hands-on event, and shows that are culturally diverse. We will include more tactile items in shows for visually-impaired individuals, be sensitive and responsive to hearing impaired people, and pay attention in order to reach out to those less included.
- We will continue to speak our UU identity during receptions and events as well as in the wider community.
- We will also continue to contribute our time, talent and treasure in all the work we do, and we will work to stay in the black and continue to contribute more monetarily to UUFCO than we need to function.

**Challenges:** Our biggest challenge is the aging of our group. We have lots of energy and enthusiasm, but it is clear we need to recruit younger members to our team as well.

### **CASCADIA CHALICE LIGHTERS COMMITTEE ANNUAL REPORT 2022-23**

*Submitted by Chris Herrick, Ambassador*

**Purpose:** To increase UUFCO members' participation in the Cascadia Chalice Lighter program that makes grants to Pacific Northwest UU congregations to fund projects. Eligibility for such grants is given only to "honor" congregations that have 30% of their members responding each year to

the donation "calls" of the umbrella Cascadia organization. UUFCO was able to build its children's playground in 2014 thanks to such a grant, but due to various reasons had lost its 30% participation in subsequent years. My purpose as new Chalice Lighter Ambassador was to bring UUFCO participation in the program back up to and over the 30% level.

**Accomplishment:** I am happy to report that my brief talk to the congregation from the pulpit at the end of September 2022, followed by my active personal solicitation of members in my "Fall Campaign" on subsequent Sundays through October, more than doubled our prior Chalice Lighter participation, bringing us slightly above the required 30% to maintain Chalice Lighter grant eligibility, according to my records. This constitutes an increased contribution of time, talent and treasure to sustain and steward the fellowship.

**Goal:** Through another Fall Campaign hopefully beginning again with a brief talk from the pulpit to the congregation at the end of September 2023 I hope to continue to increase our participation in Chalice Lighters, to the point where we far exceed the 30% membership requirement. My specific goal for 2023-24 is to increase the Chalice Lighter roster to at least 50% of our current membership.

**Challenge:** The main challenge is the usual challenge of any fundraiser, especially to a congregation that is asked to contribute money repeatedly to the fellowship itself and to its many programs, of persuading members to sign up. Thus far, too, I have been frustrated because I have not found that the organizational ability of Cascadia to correctly expand its roster to add newly enrolled UUFCO participants has been reliable but I am hopeful that situation will have been resolved by September 2023.

## **CONNECTIONS AND MEMBERSHIP TEAMS ANNUAL REPORT 2022-23**

*Submitted by Chela Sloper, Congregational Life Facilitator*

### **Members:**

**Membership Team:** Tere Pelaez, Marty Rudolph, Nancy Tyler

**Connections Team:** Andy Barss, Becky Dobrowski, Shelley Freeman, Noreen Halberstadt, Joe Maier

### **Purpose:**

The shared goal of the Connections and Membership Teams is to provide pathways for making meaningful connections to UUFCO at all stages of involvement, beginning with first visits through becoming a member (i.e., signing the Membership Book) and entering into a covenantal relationship with UUFCO.

### **Accomplishments**

- Through in-person, Zoom chat, and web-based sign-ups, 257 people signed up to receive our UUFCO communications this year.
- The Connections Team has hosted monthly Newcomer Welcome sessions on the first Sunday of the month. These have had wide-ranging attendance, from 1-2 people to 20!

- The Connections Corner has been established as a place where newcomers can ask questions, meet a welcoming presence (members of the connections Team are there every Sunday), and request a printed nametag.
- The Membership Team led three quarterly Path to Membership classes, and welcomed 56 new members in FY 2022-23!

**Challenge:** It is the hope of the Connections and Membership Teams that all members of UUFCO will see their role in helping make UUFCO a truly welcoming community.

## **ENDOWMENT COMMITTEE ANNUAL REPORT 2022-23**

*Submitted by Pat Lenahan, Chair*

**Members:** Pat Lenahan, Chair; Donald Bear, Greg Byrne, Don Hartsough, Joan Landsberg; Ella Chatterjee (Board Liaison)

**Purpose:** The purpose of the Endowment is to assure the values of UUFCO endure. In furtherance of that purpose, the Endowment Committee is to:

- Manage and grow the Endowment Fund, and
- Increase the awareness of the Endowment Fund within the Congregation of UUFCO.

### **Accomplishments**

- This year our committee worked with the Solar Panel Committee and others to come up with a funding model that would meet the goals of the Solar Panel committee while at the same time meeting our purpose of ensuring that the values of UUFCO endure.
- This year our committee investigated and approved the movement of the assets we manage to the UUA Common Endowment Fund. Movement of our funds to the UUCEF improves our ability to have our assets actively managed in a program of Socially Responsible Investing (SRI) while freeing up committee members to focus on member education within UUFCO.

### **Future Goals:**

- This coming year our committee plans on holding 2 educational seminars for the members. Topics being considered are Estate Planning, Endowments (what are they?), Tax implications of giving.
- This coming year our committee will complete our planning regarding recognition of Endowment donations.

**Challenge:** Some of the educational seminars we would like to offer require professionals to present, such as estate lawyers, financial advisors, and accountants. These have been a challenge to line up in the past.

## FACILITIES SYSTEMS ANNUAL REPORT 2022-23

*Submitted by John Lawton, Chair*

**Members:** Lewis McFarland, Jim Huguet, John Lawton; Robert Hedeem, Board Liaison; and Parker Doeling, Facilities Manager

**Purpose:** The Facilities Committee is concerned with the upkeep, maintenance, and repair of the church building and physical plant (heat, A/C, water, etc.). To that end we work closely with our building supervisor Parker Doelling to keep things humming and ready for use by the congregation. Year Two of covid restrictions meant that building usage was significantly down, but still subject to the “natural shocks that flesh is heir to”, such as plumbing repairs, woodpecker damage, and crane sculpture lighting to name a few.

### **Accomplishments**

- Repair of one of the heat pumps that is part of UUFCO’s HVAC system. Fortunately some of the heat pump components were still under warranty. In procedural matters, we pressed for a return of periodic “cluster” meetings that keep all building and grounds committees, sub-committees, as-hoc committees, cadres, etc. informed and aware of each other’s activities.
- New security camera was installed on the north side of the building.

*Note:* These are not so much accomplishments, as they are needed repairs. A true accomplishment for this committee would be to have no accomplishments. All of these accomplishments were done under the direction of Parker Doeling, the facilities manager, and would have been done whether the facilities systems committee existed or not.

### **Goals**

- The facilities systems committee was set up before we even had our first services at the new UUFCO building. Since that time UUFCO has hired staff that does most if not all the duties of the facilities systems committee. For that reason, the facilities systems should be eliminated and a more task-oriented committee installed in its place.
- Parker has requested a need for help with short term projects. A new committee could be formed that helps Parker with these projects on a monthly basis. Hopefully, a committee along these lines would not only be helpful to Parker but also get more of the congregation involved with the building and grounds. Giving a place and a time for the whole congregation to contribute to end statement number 6; contribute time, talent, and treasure to sustain and steward the fellowship.

**Challenge:** Can we get buy-in from enough people in the congregation to show up at a certain time to do the tasks Parker needs done? Past workdays have not been well attended. The solution may be for better clarity on time involved and a more permanent day and time.

## **FINANCE COMMITTEE ANNUAL REPORT 2022-23**

*Submitted by Fletcher Chamberlin, Chair*

**Members:** Fletcher Chamberlin, Chair; Fran Bathaw, Trisha Bell, Herb Blank, Stephanie Burnett, Mark Hickman, Larry Price

**Purpose:** Oversees the financial operations and health of the Fellowship; assists the board by leading and guiding our budgeting process, spending and approval processes, financial investments and annual reviews.

### **Accomplishments**

- Our primary purpose is to sustain and steward the fellowship. Again this year, we were able to close the 2021-2022 year with a small surplus. We created a balanced budget for 2022-2023 that significantly increased staff salaries and continues investments in our building and our Social Justice initiatives. At this writing in May 2023, it appears that we may end the 2022-2023 fiscal year with a small loss, after, funding a revamp of our WiFi system and significant repairs to our heating system. Fortunately, we have reserves that will cover any shortfall. For 2023-2024, we have again passed a balanced budget. (Ends Statement: 6)
- We continued to fund a significant portion of our fellowship's Social Justice initiative from the church budget, and have increased that commitment for 2023-2024. We coordinated with the staff as the Fellowship moved to QuickBooks for accounting, away from the Church Windows system. (Ends Statement: 8)
- Thanks to Sylvia McFarland, we updated our Finance policies. (Ends Statement #6)

### **Future Goals**

- Again, produce a small operating surplus. (Ends Statement #6)
- Enhance the positive benefits of our Sunday services with a revamp of the AV system, and identify the appropriate way to pay for it. (Ends Statement #1)
- Continue to support our RE activities financially. (Ends Statement #3)

### **Challenges**

- We have a narrow pyramid of very generous donors. Loss of any one of them would cause budgetary problems and probably require use of our remaining operating reserve.
- Our wonderful building is beginning to age, and electronic and heating elements are starting to need replacement. We need to add funding to a capital reserve. We should also explore funding a full capital replacement study.
- Outside rental income is now a significant part of the budget. Continuing the successful growth of that program while simultaneously meeting all the needs of the congregation will require a balanced, careful approach.

## LEADERSHIP DEVELOPMENT COMMITTEE ANNUAL REPORT 2022-23

*Submitted by Sallie Neillie*

**Co-Chairs:** Gwen Baker-Yuill and Sallie Neillie

**Members:** Linda Johnson, Susie Hickman, Marean Jordan

**Purpose:** The Leadership Development Committee (LDC) supports leadership in the UUFCO congregation through seeking out nominees for all elected positions, identifying resources and best practices to support UUFCO leaders, providing a forum that fosters ongoing learning and collaboration among leaders, and building relationships with UUFCO members and friends to explore future leadership possibilities.

### Accomplishments

- This year LDC sponsored a vibrant Community Fair showcasing the work of UUFCO committees, teams, and the Board. Over 100 congregants participated, and 24 committees and teams were represented. (Ends Statements: 5, 6)
- LDC planned and facilitated three Leadership Collaboratives, engaging committee and team leaders, members, and future leaders in the ongoing work of aligning their goals with the Ends that came out of the last year's Listening Sessions and beginning to consider how to communicate the impact of their work.
- This year LDC strengthened its relationship with the Board through regular communication, identification of leadership needs for elected positions, a shared focus on leaders' understanding of the Ends, and the development of an impact statement to guide UUFCO's future direction. (Ends Statements: 2, 5, 8)

### Future Goals

- This coming year LDC will continue to identify and empower future leaders through ongoing conversation and exposure to learning opportunities, committee service, and UUA leadership resources. (Ends Statements: 1, 2, 5, 6)
- LDC will develop and/or facilitate a range of learning opportunities for committee and team leaders and prospective leaders to increase communication and collaboration and encourage a focus on documenting the impact of their work. (Ends Statements: 1, 2, 5, 6)

LDC will develop and/or facilitate a range of learning opportunities for committee and team leaders and prospective leaders to increase communication and collaboration and encourage a focus on documenting the impact of their work. (Ends Statements: 1, 2, 5, 6)

**Challenges:** A focus on identifying and documenting the impact of teams' and committees' work will require some new tools and resources. How do we tell the story of the many ways in which our work impacts lives? There are many demands on leaders' time. How can we be strategic about the allocation of our time to have the maximum impact? (Ends Statements: 1, 2, 6)



## PASTORAL CARE TEAM ANNUAL REPORT 2022-23

*Submitted by Ellen Atkin*

**Members:** Wendy Howard, Susie Hickman, Ellen Atkin, Pam Wilson, Greg Byrne, Eliza Lewis, Ben Morgan; Rev. Scott Rudolph

**Mission:** The lay Pastoral Care Team's mission is deep listening, engendering emotional support to fellow congregants in times of difficult passages. We work in tandem, and as adjunct to, the support given by Rev Scott. We also give support to one another in these efforts.

### **Accomplishments:**

- Our team feels extreme gratitude for the depth of support, in both giving and receiving. Each story is unique and personal, and an important expression of our faith, personal growth and practice. It is a privilege to serve in this capacity. In our working together, we have become a cohesive and mutually supportive team, that also greatly serves one another. (Ends statements 1, 4, 5 and 6)
- We have attended many congregants through calls, cards and helping visits. We follow the weekly Joys and Sorrows in an effort to celebrate, as well as offer compassion, in times of difficulty and bereavement. (Ends statements 1,4,5 and 6)
- In addition to our monthly PCT meetings, we receive additional training in a second monthly meeting that focuses on study for enrichment and obtaining new skills and personal growth. We are currently studying *The Mindful Self-Compassion Workbook* by Kristin Neff, PhD, and Christopher Germer, PhD. (Ends statements emphases on 4 and 6)

### **Goals:**

- It is a current and future goal to become more visible, especially to the many new members of our growing congregation. This must be, at the same time, more nuanced, due to the personal nature of our contacts. We are now reading the Joys and Sorrows each Sunday, thus helping to introduce ourselves. We have also decided to attend new membership receptions. (Ends Statement #5)
- We look forward to continuing to work together, and expanding our exposure to the needs of others, as well as expanding our caring skills. (Ends statements 1,4,5 and 6)

**Challenge:** Our challenge and goal is to offer support and confidentiality in a way that does not foster dependency, but a loving temporary lift of spirit, and companionship, in time of need.

## SACRED GROUNDS TEAM ANNUAL REPORT 2022-23

(fka Memorial Garden Team)

*Submitted by Judy Hurlburt, Chair*

**Members:** Ellen Atkin, Duncan Brown, Dale Clark, Lois Wilson; Judy Hurlburt, Chair

**Purpose:** Develop a memorial area on grounds below the building

## **Accomplishments**

- This year our team, with the help of Linda Wetzel, of the Art Resources Team, made final design decisions on the bird memorials. Linda contacted Alisa Looney, of River ART Adventures LLC, whom we worked with for the designs. These will hang on the Loving Embrace Memorial. We chose six bird designs to be made of patinaed copper to coordinate with the bells on the Bell Memorial. We are finalizing plans and Alisa will give us a final estimate.
- This year, Judy submitted a policy to the Board regarding parameters for who can hang a memorial in the Sacred Grounds. The policy passed unanimously.
- This year, the Board approved \$8,000 from the reserve Art Funding to help purchase an inventory of birds to keep at the church to be used as appropriate.

## **Future Goals**

- The team will finalize plans of the birds and offer a "presale" of memorials for those who want to purchase a memorial bird for their family or oneself.
- The team will continue shaping an ongoing group to monitor the Sacred Grounds for maintenance needs.

**Challenge:** Coordinating time with the artist to finalize bird costs so we can offer them at at presale.

## **SOCIAL JUSTICE STEERING COMMITTEE ANNUAL REPORT 2022-23**

*Submitted by Max Merrill, Chair*

The Social Justice Team has had an exciting year, from supplying water for the Warm Springs Confederated Tribes, to "nourishing" the underfed in our community, to partnering resources for the homeless (including the Safe Parking Program), to bringing to fruition our roof solar project ... the list could go on and on.

The Congregational Assistance Team (CAT) was fully involved this year and, after the retirement of Larry Price who acted as chair of the SJSC for many years, a new process for assuring continuity of leadership was implemented by providing that a member of CAT will act as Chair of the Social Justice Steering Committee on a rotating, annual basis.

I want to thank all our project leaders and all of the team volunteers for their hard work this year in making our Social Justice programs so successful.

We learned from the Listening Sessions (Winter 2022) that Social Justice continues to be of the highest priority in the minds of our congregants and our goal is to meet their high expectations of us.

Thanks to the generosity of the congregation as demonstrated by our recently completed successful Pledge Campaign, we can move forward by strengthening our existing programs and, if warranted, begin worthwhile new endeavors.

We are excited to have the opportunity to serve those in need in our communities in ways that help individuals to flourish.

### **Bend Bethlehem Inn Dinner**

*Submitted by Leslie Koc*

**Members:** Leslie Koc and many UUFCO volunteers

**Purpose:** With the involvement of 20-25 monthly volunteers, prepare and serve a home-cooked meal each month at Central Oregon's homeless shelter, Bethlehem Inn.

**Accomplishment:** Gradually coming out of the COVID restrictions, the monthly Bethlehem Inn dinner continued each month as the number of Bethlehem Inn residents increased. The year ended with an average of 85 meals served on the fourth Thursdays of the month. The signature dinner is turkey meatloaf, mashed potatoes, gravy, mixed vegetables, cupcakes and milk. (Ends statements 5, 8)

#### **Future Goals**

- Introduce more new UUFCO members to the Bethlehem Inn dinner opportunities at the monthly Sunday Social Justice table. (Ends statement 5)
- Schedule a month for UUFCO youth to contribute to the meal preparation and serving of the dinner. (Ends statements 5, 8)

**Challenge:** As the number of social Justice programs expand, the challenge will be to maintain interest in this high impact community outreach effort.

### **Congregational Assistance Team (SJ-CAT)**

*Submitted by Max Merrill*

**Team Chair:** Max Merrill

**Team Members:** Sue Clarke, Mark Steinberg

**Purpose:** This team is designed to support the health, effectiveness, and balance of the overall social justice program and the Social Justice Steering Team, and communicate between the Steering Team and the congregation.

## **Accomplishments**

- Create documents outlining responsibilities of SJ-CAT. (Ends Statement met: 8)
- Create minutes recording highlights of all SJ Steering Team meetings (Ends Statement met: 8)
- Supervise revision of SJ webpages with accurate, updated information (Ends Statement met: 8)
- Make GCC-SJ pulpit announcements for collections in October and April (Ends Statement met: 8)

## **Goals**

- Publish twice yearly SJ congregational newsletter (Ends Statement: 8)
- Create SJ brochure available at Kiosk (Ends Statement: 8)
- Keep SJ in building current and informative (Ends Statement: 8)

## **Challenges**

- Add additional 1-2 members to SJ-CAT to keep rotating chair leadership intact
- Coordinate with overworked office staff when assistance needed

## **Diversity, Equity, and Inclusion Group (DEIG)**

*Submitted by John McKee*

**Committee Co-Chairs:** Sallie Neillie and John McKee

**Committee Members:** Diane Darling, Larry Price, Chandra Smith, Dan O'Leary, Linda Stabler, Deven Sisler, Tere Peláez, Sandy Visnack, Maggie Miller, and Stacey Sabastian

**Purpose:** DEIG works to end racial discrimination and injustice, starting within ourselves and moving out into the world around us. We support a multi-racial, multi-ethnic congregation, and are committed to building a system of true diversity, equity, and inclusion.

Through community activism, educational opportunities, and volunteer service projects, we bring light to community issues, build deep relationships, and provide tools for our congregation to become more inclusive.

## **Accomplishments**

This year DEIG has led the charge in the fight against "othering" by providing our congregation with the following ongoing learning opportunities and activities (end statements met listed by each activity):

- Interrupting Racism and Hate workshop attended by 45 (mostly) members and non-members (End Statements 1,5,7,8)
- In partnerships with seven other churches raised over \$13,000 to purchase bottled water for the Confederated Tribes of Warm Springs (End Statements 4,5,8)

- Disability Training Course attended by over 30 congregants (End Statements 5,8)
- Facilitating a Juneteenth service in early June (End Statements 1,5,7,8)
- Hosting a booth at the Father's Group annual Juneteenth Celebration (End Statements 5,7,8)

### **Goals**

- Interrupting Racism and Hate part II workshop (End Statements 1,5,7,8)
- Continue to raise funds to purchase bottled water for the Confederated Tribes of Warm Springs. (End Statements 4,5,8)
- Host a booth at the Father's Group annual Juneteenth Celebration. (End Statements 5,7,8)
- Support the Widening the Circles Study Group as they continue to guide the congregation toward a deep understanding and agreement around the adoption of the proposed Article II Revision. (End Statements 1,2,3,7,8)

**Challenge:** DEIG agrees with LDC "that communicating our upcoming events to all members and teams and committees is going to be challenging because there is no master list of everyone that's involved in every team or committee. It will take a concerted effort to coordinate with team/committee chairs to get the word out to all members." Further, Social Justice Programs have seen tremendous growth in offerings and participation and as a result the ACE, which is intended to share about the church broadly, is no longer an adequate venue for communicating the depth and breadth of social justice, and by extension DEIG. Other communication venues need to be explored and developed.

## **Environmental Justice**

*Submitted by Anastacia Compton*

**Committee Co-Chairs:** Anastacia Compton and Mike Reed

**Committee Members:** Charles Campbell, Wilma Campbell, Dan Cartmell, Curt Dawn, Kirsti Hegg, Andrea Hopkins, Marth Lussenhop, Lyn Mattei, Lewis McFarland, Larry Price, Carolyn Tate

**Purpose:** Our principles call us to respect the interdependent web of existence of which we are all a part. We work to ground our congregational life deeper in this value, with a strong focus on addressing the challenge of climate change as well as deepening awareness of the communities most impacted by it.

### **Accomplishments**

- This winter we hosted an interfaith earth summit which included five local congregations and faith groups. We gathered to watch a virtual summit presented by Ecumenical Ministries of Oregon, and then co-facilitated a discussion of local environmental issues and opportunities. (Ends statements met: 1, 2, 5, 8)
- We are celebrating a milestone in the years-long effort to bring rooftop solar to our building. A proposal from Sunbridge Solar has been presented to the Board and congregation, and enthusiastically approved by both. In April, we signed a contract for a

planned installation in July. Once operational, this array will save the congregation \$11,400 in the first year and cut our reliance on the grid by more than half. (Ends statements met: 6, 8)

- Hosted a presentation with Oregon Shines, an organization that promotes the Oregon Community Solar Program, which makes it possible for households unable to install panels on their own roofs to join community solar projects instead. Four households signed up for renewables and will start saving money on their energy bills while reducing their fossil fuel emissions. (Ends Statements met: 2, 5, 8)

### **Goals**

- We will continue to be involved in the solar project through the permitting and installation process, coordinating with members of the Board, staff, finance and facilities committees. There has been some discussion of planning a dedication ceremony for the array this fall. (Ends statements met: 6, 8)
- We are already communicating with the Worship Team to plan an Earth Day Sunday Service for 2024, and plan to create an experience that highlights both the practical and spiritual aspects of our relationship to the environment. (Ends statements met: 1, 2, 3, 8)
- We hope to coordinate with other teams and committees where there is an intersection with environmental issues; for example, we have been talking to the Art Resources Team (ART) about their upcoming plastic waste show, and have been contacted by a group of congregants interested in presenting program on green burial. (Ends statements met: 1, 2)

**Challenge:** Coordinating with different committees and teams, both those mentioned above and in any future collaboration, can require patience and good communication as we work to integrate the perspectives and priorities of each group. Choosing the right communication medium/media for these collaborations can also be challenging as individuals have different preferences for in-person meetings, virtual meetings, emails, texts – not to mention different preferences for the frequency thereof!

### **Fireflies**

*Submitted by John Horwich*

**Committee Chair and Participants:** John Horwich, Chair; Ellen Atkin, Fran Bathaw, Trisha Bell, Joyce Burk Brown, Ella Chatterjee, Marcia Edmonston, Vicki Hedeem, Nancy Hodge, Pam Horwich, John Horwich, Jane Kopriva, Jan Lawton, Martha Lussenhop, Lori McKay, Heather McNeil, Mark Steinberg, Lois Wilson

**Mission Statement:** The mission of Fireflies is to reverse the “summer slide” for those elementary school students in Central Oregon who are most vulnerable.

### **Accomplishments**

- This year the FIREFLIES Team through UUFCO-wide events like Jars of Joy and the FLASH! raised sufficient funds (in combination with UUFCO operating budget support and outside

foundation and community funding) to provide FIREFLIES book bags to 670 elementary school students at 5 schools. (Ends statements met: 1, 6, 8)

- This year our SPARKY! Book trailer distributed free books to more than 300 students throughout the summer of 2022. (Ends statements met: 1, 6, 8)

**Goals**

- This coming year, FIREFLIES is planning to work with our partner schools to increase our engagement with families. (Ends statements: 6, 8)
- This coming year, FIREFLIES is planning to continue our work of expanding the number of Team members involved in Team leadership. (Ends statements: 2, 5, 6, 8)

**Challenge:** There is a persistent challenge in finding individuals willing and able to assume and accept significant leadership responsibilities.

**Greater Community Collection (GCC)**

*Submitted by Corol Ann Cary*

**Committee Name & Participants:** Greater Community Collection: Corol Ann Cary and Annis Henson, co-chairs; Ron Clarke, Dave McGurn

**Mission Statement:** Our mission is to encourage members of our congregation to nominate local non-profits to receive donations from one of our monthly collections. Our efforts will articulate our UU identity and create a widening inclusive circle of belonging.

**Accomplishments** Having selected League of Women Voters, Neighbor Impact, Planned Parenthood, Shepherd’s House, Bethlehem Inn, Volunteers in Medicine, Every Child Central Oregon, and The Father’s Group as donation recipients, our team demonstrated, in each case, our efforts to emphasize our UU principles. (all Ends Statements were addressed.)

We also established a Liaison Task Process, designed by Annis, that allows us to spread our time evenly among the team so no one is overburdened.

| 2022         | Recipient                                 | \$ Results      |
|--------------|---|-----------------|
| July         |   | NA              |
| August       |   | NA              |
| September    | League of Women Voters                    | \$872           |
| October      | Planned Parenthood of Columbia Willamette | \$2,364         |
| November     | Social Justice Programs at UUFCO          | \$1,688         |
| December     | Bethlehem Inn                             | \$3,943         |
| 2023         | Recipient                                 | \$ Results      |
| January      | Neighbor Impact Food Back                 | \$2,769         |
| February     | Volunteers in Medicine – Cascades         | \$2,299         |
| March        | Shepherd’s House                          | \$1,990         |
| April        | Social Justice Programs at UUFCO          | \$2,660         |
| May          | The Father’s Group                        | \$1,709         |
| <b>TOTAL</b> |   | <b>\$20,294</b> |

**Future Goals:**

Our team's goal for next year is to continue the work we are doing and encourage more members to submit nominations. Hopefully, we can expand awareness of this opportunity throughout the area including La Pine Prineville, Madras, Warm Springs, and other Central Oregon communities. (All Ends Statements)

**Challenges:**

A challenge might be adding additional team members. This may help us to reach more organizations.

**Homeless Outreach Project**

*Submitted by Barbara Belzer, Ginny McKee*

**Co-Chairs:** Barbara Belzer, Ginny McKee

**Team Members:** There are currently 90 people from UUFCO who have signed up to be informed about activities of the Homeless Outreach Project.

**Mission/Purpose:** Recognizing the "inherent worth and dignity of every person" the members of the Homeless Outreach Project work to improve the lives of those in Central Oregon who are homeless, and to advocate for solutions to this humanitarian crisis. The committee provides financial, in-kind and volunteer support to non-profit organizations working on homelessness and also shares information about homelessness with our congregation.

**Accomplishments**

- Committee members continued their work with multiple organizations in Central Oregon that support our homeless neighbors. This included providing financial and in-kind support to REACH, an organization that provides services and case management to people living outdoors. Additionally, the team began preparing lunch and dinner at Family Kitchen twice a month, contributing to the monthly dinner at Bethlehem Inn in Bend, and helping staff and financially support the Emergency Shelter at First Presbyterian Church. (Ends statements met: 1, 4, 5, 7, 8)
- Awareness and advocacy are two areas that the Homeless Outreach team hoped to expand this year and we have begun that effort. A service dedicated to homelessness was held in October, a table set up regularly during coffee hour, and a guest speaker invited to speak with church members about homelessness. A number of team members are focused on advocacy, attending council meetings or writing in support of efforts to help solve homelessness in our community. (Ends statements met: 2, 7, 8)

**Goals**

- Supporting those who are homeless is a critical need in our community but it does not solve the root problem of people being homeless. UUFCO congregants have expressed interest in advocating to implement real solutions in Central Oregon including the expansion of Safe Parking and set up of managed camps. Team members will be informed of city and county



sessions addressing homelessness so that they can make their voices heard, appearing in person or by writing to council members, to voice support of real solutions to homelessness. (Ends statements to be met: 2, 7, 8)

- Homelessness has continued to increase in Central Oregon and requires more and more services to support those who are unhoused. The Homeless Outreach group plans to maintain current commitments to Family Kitchen, the Emergency Shelter, and REACH, but will work toward expanding the number of people who volunteer. (Ends statements to be met: 1, 3, 4, 5, 7, 8)

**Challenge:** As the Homeless Outreach team has expanded the work it does and established partnerships in the community, the calls for our support have increased, including financial, in-kind, and volunteer support. This is especially true during times of very cold or very hot weather. We appreciate that our committee has received the largest percentage of funding in support of the Social Justice programs but do anticipate more and more requests for help which we hope that we can respond to especially when emergencies arise.

### **Nourish**

*Submitted by Donna Dobkin*

**Co-Chairs:** Donna Dobkin, Ginny Sponsler

**Members:** Mari Brennan, Gail DeLyser, Bim Krumhansl, Janice Thompson, Ann Wood

**Mission Statement:** The Nourish Team is focused on providing fresh produce and perishables to local food pantries to help provide high quality nutrition to those in our community who are struggling with food insecurity. We do this by holding Produce and Perishable Food Drives on the Second Sunday of every month and by planting, tending, and harvesting a community garden plot.

### **Accomplishments**

- This year, Nourish held 10 Produce and Perishable Food Drives. We collected over 1,200 pounds of fresh food that was donated to several local food programs that serve our food insecure community members: St. Vincent de Paul, The Giving Plate, Family Kitchen, Shepherd's House, and Bethlehem Inn. (Ends Statements met : #6 and #8)
- This year, Nourish had an abundance of fresh vegetables from our donation plot at Hollinshead Community Garden. We displayed the harvests weekly, outside at Sunday Services, and encouraged congregants to contribute whatever they might have from their gardens as well. Our harvests were taken regularly to the food programs listed above and were approximately 300 pounds of food throughout the summer months! (Ends Statements met: #6 and #8)
- We had professional signs made to highlight our programs that will be displayed by the table when we do our Food Drive and our Gardening for Gathering table in the summer. We also had a sign made for the garden so that other gardeners can be aware of Nourish's efforts. We are happy to collect and distribute veggies from other garden plots when given the opportunity.

**Goals:** This coming year, Nourish will be working hard to continue the two programs we have in place that currently are going smoothly. Our team will continue to coordinate efforts so that everyone remains actively engaged in both projects. We will continue working relationships with each of the food programs to ascertain the value of our donations and we will have fun working together! Ginny and I continue to share the leadership responsibilities. All the current team members are ready to get to work!

**Challenge:** As always, it is hard for congregants to remember that our Produce and Perishable Food Drives are on the 2nd Sunday of the Month. We will continue to place ACE announcements in the week leading up to the drive and will explore other ways to get the word out as a reminder.

### **Tutoring Through UUF**

*Submitted by Eliza Lewis, Co-Chair*

**Co-Chairs:** Eliza Lewis and Alan Hilles

**Purpose:** The purpose of UUF's tutoring programs is to provide one-on-one learning opportunities that has been shown to increase literacy, math skills, and social skills of students determined by the school district to be in need of extra support.

#### **Accomplishments**

- **The Diamond Back Tutoring Program** serving 6th graders at High Desert Middle School – this is the 1<sup>st</sup> year start-up-- has been a great success this year with 12 active tutors (many UUF members, some not) meeting with kids covering 14 sessions/week for 45 minutes, both in person and virtual or a combination. Many of the kids are English second-language learners. A HDMS English reading proficiency teacher and a school counselor have been instrumental in making this program success possible, as well as enthusiastic support from the school administration. Reports so far from both tutors, teachers and kids show good progress in reading skills and comprehension, not to mention the benefit of kids receiving full attention, one-on-one support and validation from a generational elder weekly. (Ends Statement: 8)
- We have been happy to have **Wildcat Wizards Tutoring** back in place after the 2-year pandemic break. This current year (October 2022-May 2023) we have served 16 students weekly with reading, math, and social skills. There has been noticeable improvement in the students' abilities to achieve grade level performance status. The tutors and the students have both benefited from this time for relatedness and connections. We are grateful to Juniper Elementary Staff for continuing to support this program that impacts so many lives in our district. (Ends Statement met: 5)
- Students that feel encouraged and supported have a more positive attitude toward learning and gain higher achievement rates which continue to grow self-confidence and progress in their own accomplishments throughout their life experiences. (Ends statement met: 8)

#### **Goals**

- SAGE, a non-profit 501(3)c, is collaborating with High Desert Middle School Virtual program,

offering not only financial support (primarily book purchases) but expertise and education from their already similar existing program at Parkrose MS in Portland. This program may offer a template for starting other programs in Central Oregon schools in the future. (Ends Statement: 5)

- Add and maintain more tutoring volunteers and subs to the Wildcat Tutoring program at Juniper Elementary program increasing our ability to serve at least 16 students with flexibility for tutor absences and the potential to serve up to 20 students. We hope to reach out to the new members of UUFCCO with information about opportunities for service within our community. (Ends Statement: 8)
- We want to be able to provide the after-school snacks (\$150 estimate) for the Wildcat tutoring students in 2023-24 if the federal grant is not successfully obtained by the staff at Juniper Elementary. (Ends statement: 8)

**Challenges:**

- Recruiting volunteers for primary and substitute positions for Wildcat Tutoring.
- Engaging School Staff in Organizing Students/Tutors/Timing at Diamondback Tutoring.

**STEWARDSHIP COMMITTEE ANNUAL REPORT 2022-23**

*Submitted by Nathan and Stef Jenkinson, Co-Chairs*

**Members:** Stef Jenkinson, Nathan Jenkinson, Max Merrill, Mark Hickman, Ben Morgan, Peter Jesse, Rev. Scott Rudolph

**Purpose:** The mission of the Stewardship Committee is to conduct an annual pledge campaign that secures revenue to support the operations of UUFCCO. A successful campaign includes educating the congregation about the meaning and importance of Stewardship as a spiritual practice, developing messaging activities that respond to the needs and desires of the congregation, conducting the Annual February Pledge Campaign, sharing perspectives with the Board and related committees about future philanthropic strategies needed to meet the needs of a growing congregation.

**Accomplishments:**

- Monthly meetings began in-person in September, with the core Stewardship Committee members: Stef and Nathan Jenkinson (cp-chairs), the treasurer, and the board vice president. We were also joined by 3 members at large and Rev. Scott.
- The committee produced a provocative theme, speeches from involved current members, a striking pledge banner, a pledge month slide, a pledge goal “thermometer” that was colored in by our UUFCCO youth, and effective mail and online pledge materials.
- As of August 26, 2023, the 2022-2023 Annual Pledge Campaign received 233 pledges totaling \$496,540, which was 101.3% of our goal. It represented an 11% increase from the previous year, which included receiving 203 pledges totaling \$446,031.60. This year’s campaign was the largest member pledge commitment ever and the generosity of our membership continues to be strong and meaningful. The Stewardship Committee believes

that ongoing, engaged leadership and collaboration between all committees and teams significantly contributed to the campaign's success.

### **Future Goals**

- To build on the successes of this year's campaign and to exceed the financial target given to the Committee in the coming year.
- To collaborate with the Endowment Committee and Annual Auction Chairs to determine consistent messaging and presentation that enhances the success of each committee, and to deepen UUFCO's capacity to generate the operating revenue it requires.
- To build on and deliver a comprehensive / year-round stewardship messaging communications plan.
- To foster a cultural shift in how Stewardship / financial giving is perceived within the Fellowship, and to connect generosity through financial support to what connects and is meaningful to each.
- To work closely with Finance Committee to support budget development, communication, and processes for financial goal setting.
- To continue to expand the Stewardship Committee with members needed to achieve the long-term strategy for fund-raising and succession of key members.
- To clearly identify needed staff resources for design, production, recordkeeping, and other tasks to support a successful campaign.
- To work with the Membership Team to create a culture of financial support with new members and share ideas about retention of continuing members through committee engagement.
- To improve our appreciation and acknowledgement of donors, and to develop a long-term giving relationship with UUFCO as appropriate.

## **SUNDAY VOLUNTEERS: USHER & GREETER TEAM ANNUAL REPORT 2022-23**

*Submitted by Jerry Regan*

**Team Members:** 38 active ushers, greeters, and usher/greeters

**Purpose:** Provide a safe, welcoming, and comfortable experience for all congregants and visitors with a special emphasis on meeting the needs of newcomers. Assist church leaders with support services for Sunday morning worship.

### **Accomplishments**

- This year the Ushers and Greeters transitioned from a loose collection of "individual" volunteers into a "team" working together to provide consistent support for Sunday services. (Ends statement #5)
- The Usher/Greeter team contributed their time and talents to provide Congregants, Visitors and Staff with consistent support to make Sunday services safe and efficient. (Ends statement # 6)

**Goals:** This coming year the Greeter/Usher team aspires to have more social and training gatherings to encourage input and discussion about our roles and responsibilities. Also, to have fun social gatherings! (Ends statements 5 & 6).

**Challenge:** In that the Usher/Greeter team is a large group it's difficult to find a day and time that will allow everyone to gather at the same time for training sessions, so I intend to have 2 separate sessions in September 2023 and 2 separate sessions in March 2024. Additionally, any new Ushers/Greeters will get "on the job" coaching from experienced Usher/Greeters.

## **WOMEN'S CONNECTIONS ANNUAL REPORT 2022-23**

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

**Steering Team:** Mari Brennan, Carolyn Brooks, Cris Craig, Donna Dobkin, Carolyn Tate

**Purpose:** Women's Connections provides opportunities for UUFCO women to come together for events and activities. In the context of our spiritual and fellowship journeys, Women's Connections endeavors to enhance personal growth and build strong inter-connected relationships among women in our Unitarian Universalist community.

### **Accomplishments**

- From June 2022 to June 2023, Women's Connections will have provided 3 social events that created an ever-widening circle of belonging. Our first in-person event after Covid was a potluck in July. We had themed potluck in January and a Dance Your Soul with DJ Denise party in May. We've offered two informational programs, a screening and discussion of "What the Constitution Means to Me" and a "Personal Safety with Deputy Sheriff Alecia." Each of these events had 30 - 35 attendees.
- In the same time period, we offered two activities in which participants wrote letters to get out the vote (for VoteForward -- 350 letters) and postcards supporting Janet Protasiewicz, a pro-choice judge running for Wisconsin's Supreme Court (for Activate America -- 210 postcards). She won! These activities relate to social justice for WOMEN!
- With the aim of expanding spiritual depth and practice, we explore neurological bases of spirituality in our June workshop, "The Awakened Brain", led by two UUFCO therapists, Carol Hopwood and Jesse Reeder.

**Goal:** We aim to have around five team members to provide the energy and time to offer the women of our Fellowship opportunities to connect.

**Challenge:** In our May 2022 re-evaluation of Women's Connections, we decided to plunge forward, energized by new team members Carolyn Brooks and later, Cris Craig. Attendance has been decent (around 30) at most events, but it's challenging to create new activities.

## **WORSHIP TEAM ANNUAL REPORT 2022-23**

*Submitted by Dirk Matthias, Co-Chair*

**Members:** Dirk Matthias, Noreen Halberstadt, co-chairs; Patrick Kailey, Chandra Smith, Katharine Smith, Stephanie Irvine, Quincy Bernahl, Heather McNeil; Amy Brock, DRE; Randy King, Choir Director; Rev. Scott Rudolph, Minister.

**Purpose:** Support worship at UUFCO; coordinate worship when Rev. Scott is not preaching; support Rev. Scott.

### **Key Accomplishments**

For the 2022-23 Worship year we have been preparing to support the congregation's worship needs during Rev Scott's sabbatical. The team has been collaborating since early last fall to develop a calendar for the 23 services that Scott will be away, complete with guest speakers, musical guests, worship leaders, chalice lighters, etc. At the point of this report we are approximately 10 worship services in to the sabbatical and by all accounts everything is going very well.

End statements met:

- 5) Create an ever-wider and inclusive circle of belonging. We are accomplishing this by inviting community members to join in the worship services.
- 6) Contribute time, talent, and treasure to sustain and steward the fellowship - The worship team is working to create a calendar of high quality, engaging services to sustain the congregation and to support Rev Scott in his important work of rest, reflection and renewal.

### **Future Goals**

This coming year the worship team is committed to the pursuit of more guest musicians, and increasing the number of all age's services.

Targeted end statements:

- 5) Create an ever wider and inclusive circle of belonging.
- 6) Contribute time, talent, and treasure to sustain and steward the fellowship.

**Challenge:** We recognize that guest musicians need to be paid for their art, so funding could be a potential challenge.

## **NOMINEES FOR ELECTED POSITIONS, FY2023-2024**

The UUFCO Leadership Development Committee is pleased to announce the nominees for open elected positions for our new Fellowship year beginning on July 1, 2023. These nominees bring a wide range of experience and a deep commitment to UUFCO. We feel very fortunate that they are willing to serve on the Board of Trustees.

UUFCO members will have an opportunity to vote for the nominees following the May 21, 2023 Annual Meeting. (Electronic ballots will be sent to members by email.) In accordance with the UUFCO bylaws, nominations will be allowed from the floor at the Annual Meeting.

*LDC*

*Gwen Baker-Yuill, Susie Hickman, Linda Johnson, Marean Jordan, and Sallie Neillie*

### **Board of Trustees**

*LDC would like to thank outgoing Board members Daelene Schwartz, Fletcher Chamberlin, and Ella Chatterjee for their three years of dedicated service to the Board of Trustees.*

***All Board positions are three-year terms.***

**Heather McNeil** is our nominee for Vice President of the Board of Trustees. Heather will be President in FY 2024-25 and Past President in FY 2025-26.

Heather McNeil has been a resident of Bend for 24 years. She moved here from Colorado in 1999 to become the Youth Services Manager at Deschutes Public Library, where she was a member of the management team and supervised the youth librarians, the outreach program, and services for the Latinx population. She retired in 2019. Heather is also a professional storyteller and has represented the United States at international storytelling festivals in Scotland and New Zealand, as well as performing in schools, libraries and conferences throughout the United States. She is the author of four educational books on storytelling, early literacy, and social and emotional learning at storytime, and is now working on her fifth, focused on presenting nature at storytime. She has volunteered for Moms Demand Action for Gun Safety and Think Wild. Heather joined UUFCO in 2019 and is grateful to have finally found where she belongs, with people who care about service to the community and each other. At UUFCO Heather is a member of the Fireflies and the Worship Team and served on the Membership Team. Heather is the mother of Jamie Rose, who is a Peace Corps volunteer in Guatemala, and of Rowan the Golden Retriever, who is a doofus.

**Jaz Halberstadt** is our nominee for Secretary of the Board of Trustees.

Jaz Halberstadt has been a Unitarian Universalist since she was born. She was named into the faith as an infant and grew up attending the Unitarian Universalist Church of Elgin, Illinois where she participated in RE classes and was a member of the handbell choir. In 2008, her family relocated to Central Oregon. Jaz briefly lived in Eugene, Oregon while attending the University

of Oregon. She graduated in 2015, Magna Cum Laude, with a B.S. in Educational Foundations and a focus in Service Learning. Before going to graduate school, she served a year-long term as an AmeriCorp VISTA Volunteer, working with Better Together, a local non-profit under the Educational Service District of Central Oregon. The following year she returned to the University of Oregon to complete a Master's Degree in Teaching and Curriculum. Jaz holds two Oregon teaching endorsements in both Elementary Education and English for Speakers of Other Languages (ESOL). She has worked for Redmond School District as an English Language Development Teacher for the last six years. Currently Jaz is a youth advisor at UUFCA and a member of the RE Team and the Widening the Circle Study Group. In Jaz's free time, she enjoys spending time with her family and dogs, visiting the ocean, and swimming.

**Mark Hickman** is our nominee for Treasurer of the Board of Trustees.

Mark Hickman moved to Bend in 2012 with his wife Susie, to retire on the "dry side" of the mountains. They been active in the life of UUFCA since then. Prior to moving here, Mark worked for Hewlett Packard in Vancouver, Washington as a printer engineer for 25 years, though much of his later career was working with the finance people on business and investment analysis for technology investment alternatives. Mark learned to love spreadsheets during his career and has put this skill to good use during his UUFCA volunteering. He served on the Board (VP, President, Past President) during 2015-2018, and was part of the Finance Committee during this time. From 2018-2021 Mark was the Music Director for UUFCA, putting to use his first degree in Music Education. Mark was also the chair of IT/AV during the new building project and for the first few years after the building opened, and he helped modernize the tools we use for connecting people by bringing us the Breeze software. Mark's parents still live in Shorewood Wisconsin in the same home where he was raised. Mark has the joy (and the worry) of trying to help keep his parents living there independently as long as possible. Mark's children live in Portland and are frequent visitors to Central Oregon.

**The continuing Board members for FY2023-24 are:**

**John McKee**, President

**Laura Voisinet**, Past President

**Grace Kennedy**, At-Large

**Robert Hedeem**, At-Large

### **Endowment Committee**

***Endowment Committee positions are two-year terms.***

*LDC would like to thank outgoing Endowment Committee members Greg Byrne and Patrick Lenahan for their four years of dedicated service to UUFCA's Endowment Committee.*

**Donald Bear** is our nominee for the Endowment Committee.

Donald Bear moved to Bend from New York City in 2019 with his girlfriend, Karen Steefel, after a career as an auditor and executive director of several law firms in Los Angeles and New York.



He is currently retired. He was active at All Souls Church in New York City for five years prior to moving to Bend. He was the founder and co-leader of Cork Dorks, a wine tasting group under the Laymen's League and a leader in the Small Group Ministry program. In retirement Donald enjoys skiing, cycling, kayaking, walking, reading and writing poetry, and wine collecting (including Oregon pinots).

Donald has already served on the Endowment Committee for two years. He is being nominated for a second two-year term.

**Duke Chadsey** is our nominee for the Endowment Committee.

Duke Chadsey grew up in Portland, attending the First Unitarian Church with his family. Both his parents were active Unitarians. Duke left Portland (and his active connection to UU) in 1998 to obtain an Asian Studies degree at the University of Puget Sound. After graduation he spent time traveling through Asia and teaching English in Taiwan. Upon returning to the U.S. Duke completed an MBA at Pepperdine University. He married and has two amazing daughters. The family settled in San Clemente, California, where Duke worked in executive roles for high tech companies. Unfortunately, he wife developed cancer and passed away in 2011, a transformative journey that resulted in a career change. For 11 years he has co-owned an in-home care business that serves the elderly needing assistance with activities of daily living. Duke is passionate about providing care for those in need and has served on several advisory councils and organizations providing services for families and children. In 2020 he returned to the Pacific Northwest and settled in Sisters. He has recently added UU back into his life and joined in 2023. He feels that serving on the UUFCO Endowment Committee is a good fit for his life experiences, skills, and passions.

**Don Hartsough** is our nominee for the Endowment Committee.

Don Harsough has been a UU for over 50 years, having joined the Unitarian Church in West Lafayette, Indiana, along with his wife, Dalyte Hartsough, and their three young children in the 1960s. He and Dalyte were married in a Presbyterian church in Vallejo, California, in 1957. His undergraduate degree was from the College of Wooster and his graduate training to become a clinical psychologist was taken at the University of Florida. As an associate professor at Purdue University, he served as the Director of Clinical Training and supervised the education of over 30 graduate students. In 1971 he founded the Lafayette Crisis Center, which still exists. When Don and Dalyte retired to Bend in 2002, they became very active in UUFCO. The church's board hired our first (part-time) minister, Rev. Jeanne Pupke, when Don was the board chair. Along with many, many other dedicated UUs, during the four years starting in 2011, he was part of the effort to create the beautiful facility we now occupy. One of his favorite memories is being the worship associate on Sunday, February 1<sup>st</sup>, 2015 – our very first worship service in our New Spiritual Home!

**Rob Kinney** is our nominee for the Endowment Committee.

Rob Kinney moved from Massachusetts to Bend in 2015 with his wife Susan. Rob holds a medical degree and worked as an internal medicine physician for several years before discovering that

the real world of healthcare is not how it appears on television. Since then, he has worked as a consultant for financial services companies providing guidance regarding longevity and life expectancy as it relates to the pricing of life insurance and annuity policies. He is currently working part-time running his own consulting business. Rob intermittently attended several Unitarian Universalist congregations in New England over the course of many years before finally becoming a member of UUFCO in 2017. Rob and Susan enjoy taking their dog Windy on walks in and around Bend. Rob also enjoys skiing, swimming, and gardening. He is currently experiencing the joys and challenges of being an adult student of the piano.

**Joan Landsberg** is our nominee for the Endowment Committee.

Joan Landsberg, a native Oregonian, joined the Peace Corps and taught in the Chemistry Department at the Universidad de Costa Rica. As a career research chemist/forest ecologist for Forest Service Research, Joan researched the effects of prescribed fire on the ponderosa pine forests in OR and WA, which became her Ph.D. dissertation. She has an adult daughter in Olympia, WA. Joan first joined a UU group in Corvallis in 1967 where she taught RE middle schoolers. In 1977 she joined UUFCO, and in 2018 she introduced the UU history series, “A Long Strange Trip—200 Years of Unitarian Universalist History,” and has co-lead the series since. Joan also started and maintains our ink cartridge recycling program. In 2019, she was elected to the Endowment Committee and in 2021 became its recording secretary. Joan volunteers with: Partners of America—an exchange program with Costa Rica; the Latino Community Association, where she assists Spanish-speaking individuals; and Opera Bend and the Sun River Music Festival, for whom she hosts guest musicians. In earlier years Joan was an avid downhill skier, bicycled for her team in Pole, Pedal, Paddle; hiked and backpacked. Joan enjoys cooking and now rides a recumbent tricycle—which can’t tip over!

Joan has already served two two-year terms and is being nominated for an additional year.

### **Leadership Development Committee**

***Leadership Development Committee positions are three-year terms.***

*LDC would like to thank outgoing member Marean Jordan for her four years of dedicated service to UUFCO’s Leadership Development Committee.*

**Susie Hickman** is our nominee for the Leadership Development Committee—Seat 5.

Susie Hickman was born in West Lafayette, Indiana; then lived around the country (Delaware, Wisconsin, Washington State, California, Oregon) and overseas in Germany for a year. She and Mark Hickman met in the Bach Chamber Choir and have been singing a marital duet for 40 years. Their union has resulted in many a melody and two great kids, Kelly and Stephen.

Professionally Susie has worked as a Public Relations Account Executive, Midwest Regional Representative for International CARE, Director of Business Development for Washington State University, Communications Professor at San Diego State University, Health Management

Coordinator, Community Mediator, Therapist, Spiritual Director and Anam Cara (Gaelic for soul friend). All of which arose from a BA in Communications and Business Administration, graduate work in Conflict Resolution, a Masters in Counseling Psychology, certification in Spiritual Direction and completion of a three-year Anam Cara Apprenticeship.

UU Church involvement began In February of 2013, when Susie and Mark moved to Bend and started attending services. Since then Susie has participated in many UU groups, volunteer efforts and activities including chairing the UUFCO Communications Team, singing in the choir, the Pastoral Care Team, Leadership Development Committee and Adult Spiritual Development Team.

Susie has already served on LDC for one year. She is being nominated for a three-year term—Seat 5.

**Daelene Schwartz** is our nominee for the Leadership Development Committee—Seat 4.

Daelene Schwartz is a native Oregonian who grew up in a small mill town, St. Helens, located on the Columbia River north of Portland. Since graduating college and launching into the work force, every position she held over almost 40 years of her career involved working with Seniors - a population near and dear to her heart. The first portion of Daelene’s career included running volunteer programs for the City of Salem, the American Red Cross, and the State of Oregon Department of Human Services (DHS). Moving out of the non-profit arena, Daelene’s career path then found her in leadership positions in sales and marketing for a nationwide Senior Living company, and large health insurance companies, PacificCare and Kaiser Permanente, leading their Medicare lines-of-business. Daelene, and her husband, Barry, moved to Bend in 2016 and soon afterward joined UUFCO. She has served on a number of committees at UUFCO including Membership, Stewardship, Auction, and President of the Board of Trustees. Daelene’s interests these days are focused on traveling to those few “bucket list” places she’s yet to experience and spending quality time with her family which includes five grandkids.

**The continuing LDC members for FY 2023-24 are:**

**Linda Johnson**, Seat 1

**Sallie Neillie**, Seat 2

**Gwen Baker-Yuill**, Seat 3

**FY 2023-24 Draft Budget (follows)**

**Submitted by Fletcher Chamberlin, Treasurer**

***Compared to 2021-22 Budget and 2022-23 Estimated Actual***

# Unitarian Universalist Fellowship of Central Oregon Budget for 2023-2024 Fiscal Year

*with comparisons*

On May 1, 2023, the Board of Trustees approved the operating budget for the 2023-2024 fiscal year for the Fellowship, as shown below.

**Highlights:**

- Annual operating revenue of \$668,850 and expenses of \$666,998, resulting in a small surplus of \$1,852 .
- Rental revenue of \$70,000, vs. \$65,000 expected for this year (more weddings booked for 2024).
- Pay increases for the staff of 6%.
- Increases for ongoing maintenance of the building and the grounds.
- An increase in Social Justice commitments from \$12,000 to \$14,000.

With nearly 100 individual line items, there are many places where the results can be above or below the budgeted number, but these are our best estimates as of now. Our discussion at the Annual Meeting will focus on the major categories that will have the biggest impact on our results.

|  | 2021-22<br>Final     | 2022-23<br>Budget    | 2022-23<br>Forecast  | 2023-24<br>Budget    |
|--|----------------------|----------------------|----------------------|----------------------|
| <b>Revenue</b>                             |                      |                      |                      |                      |
| <b>4000 Revenue</b>                        |                      |                      |                      |                      |
| 4010 Current Year Pledge Receipts          | 441,907.11           | 450,000.00           | 448,000.00           | 490,000.00           |
| 4019 Prior Year Pledge Receipts            | 1,012.50             | 0.00                 | 0.00                 | 0.00                 |
| 4030 Miscellaneous Contributions           | 17,595.50            | 22,000.00            | 21,000.00            | 20,000.00            |
| 4031 Recycle, coupons, partner share       | 128.29               | 200.00               | 150.00               | 200.00               |
| 4040 Art Resources Team Donations          | 620.87               | 1,200.00             | 2,000.00             | 1,500.00             |
| <b>Total 4000 Revenue</b>                  | <b>\$ 461,264.27</b> | <b>\$ 473,400.00</b> | <b>\$ 471,150.00</b> | <b>\$ 511,700.00</b> |
| <b>4200 Special Events</b>                 |                      |                      |                      |                      |
| 4210 Auction Income                        | 435.00               | 15,000.00            | 12,406.00            | 12,500.00            |
| 4220 Adult Spiritual Development Workshops | 871.00               | 800.00               | 0.00                 | 1,000.00             |
| 4230 Congregation Events Income            | 0.00                 | 700.00               | 500.00               | 700.00               |
| <b>Total 4200 Special Events</b>           | <b>\$ 1,306.00</b>   | <b>\$ 16,500.00</b>  | <b>\$ 12,906.00</b>  | <b>\$ 14,200.00</b>  |
| <b>4300 Rent Income</b>                    |                      |                      |                      |                      |
| 4310 Event Rental Income                   | 48,865.23            | 75,000.00            | 65,000.00            | 70,000.00            |
| 4311 Event Amenity Income                  | 150.00               | 300.00               | 3,000.00             | 3,000.00             |
| 4320 Event Staffing Income                 | 11,000.00            | 20,000.00            | 19,250.00            | 23,000.00            |
| 4330 Preschool Rent Income                 | 30,075.00            | 39,000.00            | 39,900.00            | 42,950.00            |
| <b>Total 4300 Rent Income</b>              | <b>\$ 87,890.23</b>  | <b>\$ 134,300.00</b> | <b>\$ 127,150.00</b> | <b>\$ 138,950.00</b> |
| <b>4800 Other Revenue</b>                  |                      |                      |                      |                      |
| 4810 Interest Income                       | 7,283.08             | 1,200.00             | 4,089.00             | 4,000.00             |
| 4820 Gain/Loss on Sale of Asset            | -1,085.42            |                      | 325.00               | 0.00                 |
| <b>Total 4800 Other Revenue</b>            | <b>\$ 6,197.66</b>   | <b>\$ 1,200.00</b>   | <b>\$ 4,414.00</b>   | <b>\$ 4,000.00</b>   |
| <b>Total Revenue</b>                       | <b>\$ 556,658.16</b> | <b>\$ 625,400.00</b> | <b>\$ 615,620.00</b> | <b>\$ 668,850.00</b> |

|   | 2021-22<br>Final     | 2022-23<br>Budget    | 2022-23<br>Forecast  | 2023-24<br>Budget    |
|---|----------------------|----------------------|----------------------|----------------------|
| <b>Expenditures</b>                                   |                      |                      |                      |                      |
| <b>5000 Payroll Expenses</b>                          |                      |                      |                      |                      |
| 5010 Salaries & Wages                                 | 300,124.38           | 340,420.10           | 323,000.00           | 364,186.00           |
| 5015 Housing (PR)                                     | 30,120.00            | 30,120.00            | 30,120.00            | 30,120.00            |
| 5020 Payroll Taxes (Fed)                              | 14,895.98            | 16,438.00            | 16,000.00            | 18,625.00            |
| 5025 Payroll Taxes (OR)                               | 2,888.66             | 3,638.00             | 2,900.00             | 3,375.00             |
| 5060 Healthcare (Employer Paid)                       | 23,077.87            | 25,850.00            | 22,800.00            | 25,542.00            |
| 5070 Retirement (Employer Paid)                       | 24,075.71            | 29,383.90            | 26,200.00            | 25,787.00            |
| 5080 Professional Development                         | 10,579.72            | 14,175.00            | 10,000.00            | 16,500.00            |
| 5081 Staff Meeting Expenses                           |                      | 350.00               | 350.00               | 350.00               |
| 5085 Sabbatical                                       | 5,500.00             | 0.00                 | 5,500.00             | 0.00                 |
| 5090 Background Checks                                | 94.25                | 350.00               | 350.00               | 350.00               |
| 5095 Payroll Service Fees                             | 1,265.01             | 1,330.00             | 1,371.00             | 1,500.00             |
| <b>Total 5000 Payroll Expenses</b>                    | <b>\$ 412,421.56</b> | <b>\$ 463,203.00</b> | <b>\$ 438,591.00</b> | <b>\$ 486,335.00</b> |
| <b>6100 Professional Fees/Contract Services</b>       |                      |                      |                      |                      |
| 6110 Consulting                                       | 4,580.85             | 540.00               | 550.00               | 1,000.00             |
| 6120 Legal Fees                                       | 152.00               | 1,500.00             | 1,950.00             | 1,000.00             |
| <b>Total 6100 Professional Fees/Contract Services</b> | <b>\$ 4,732.85</b>   | <b>\$ 2,040.00</b>   | <b>\$ 2,500.00</b>   | <b>\$ 2,000.00</b>   |
| <b>6200 Worship Expenses</b>                          |                      |                      |                      |                      |
| 6210 Worship Supplies & Workshops                     | 637.84               | 600.00               | 682.50               | 1,000.00             |
| 6211 Speaker Expense                                  | 1,140.00             | 2,700.00             | 265.86               | 1,500.00             |
| 6212 ASL Expense                                      | 325.27               | 1,500.00             | 221.55               | 1,500.00             |
| 6213 Worship Media Licenses                           | 649.26               | 300.00               | 458.47               | 300.00               |
| 6214 Coffee   | 321.66               | 1,200.00             | 3,463.18             | 2,000.00             |
| 6215 Music Supplies & Workshops                       | 1,847.60             | 2,500.00             | 1,390.99             | 2,500.00             |
| 6216 RE Supplies & Workshops                          | 2,663.68             | 3,300.00             | 3,183.02             | 3,300.00             |
| 6217 Guest Musicians                                  |                      | 1,500.00             | 1,834.43             | 2,000.00             |
| <b>Total 6200 Worship Expenses</b>                    | <b>\$ 7,585.31</b>   | <b>\$ 12,100.00</b>  | <b>\$ 11,500.00</b>  | <b>\$ 14,100.00</b>  |
| <b>6300 Organizational Expenses</b>                   |                      |                      |                      |                      |
| 6310 Dues-UUA   | 22,118.00            | 24,330.00            | 24,330.00            | 26,763.00            |
| 6311 Dues-OR State                                    | 100.00               | 100.00               | 100.00               | 100.00               |
| 6320 Office Supplies                                  | 1,180.47             | 1,200.00             | 976.19               | 1,300.00             |
| 6321 Copies/Printing                                  | 680.12               | 850.00               | 1,168.08             | 850.00               |
| 6322 Tech Support                                     |                      | 1,500.00             |                      | 1,500.00             |
| 6323 Postage  | 177.85               | 280.00               | 229.65               | 500.00               |
| 6330 Software   | 709.62               | 435.00               | 384.72               | 500.00               |
| 6350 Advertising, Print Media                         | 1,697.40             | 2,020.00             | 920.54               | 1,500.00             |
| 6351 Advertising, Social Media                        | 289.10               | 1,500.00             | 1,862.08             | 1,500.00             |
| 6352 Advertising, Events & Outreach                   | 91.50                | 500.00               | 408.16               | 500.00               |
| 6353 Event Expenses & Promotion                       | 2,152.75             | 2,300.00             | 1,774.02             | 4,500.00             |
| 6355 Newsletter                                       | 369.54               | 350.00               | 350.64               | 350.00               |
| 6356 Congregation Directory                           | 567.00               | 805.00               | 785.42               | 800.00               |
| 6357 Website Expenses                                 | 633.71               | 500.00               | 446.51               | 600.00               |
| <b>Total 6300 Organizational Expenses</b>             | <b>\$ 30,767.06</b>  | <b>\$ 36,670.00</b>  | <b>\$ 33,736.00</b>  | <b>\$ 41,263.00</b>  |

|  | 2021-22<br>Final     | 2022-23<br>Budget    | 2022-23<br>Forecast  | 2023-24<br>Budget    |
|--|----------------------|----------------------|----------------------|----------------------|
| <b>6500 Facilities &amp; Equipment</b>       |                      |                      |                      |                      |
| 6510 Utilities                               | 28,108.77            | 28,000.00            | 29,000.00            | 22,000.00            |
| Solar Payback                                |                      |                      |                      | 6,600.00             |
| 6515 Telephone/Internet/Zoom                 | 1,794.30             | 2,425.00             | 3,283.00             | 3,600.00             |
| 6520 Security Monitoring                     | 1,319.78             | 1,440.00             | 1,470.00             | 1,500.00             |
| 6521 Security Equipment & Repair             | 2,638.73             | 0.00                 | 3,400.00             | 500.00               |
| 6530 Building M&R                            | 13,813.33            | 14,000.00            | 26,000.00            | 17,000.00            |
| 6531 Maintenance Contracts                   | 9,245.72             | 11,500.00            | 14,876.00            | 12,000.00            |
| 6540 Grounds M&R                             | 5,025.31             | 3,500.00             | 8,200.00             | 7,000.00             |
| 6550 Janitorial Supplies                     | 2,610.09             | 2,950.00             | 3,280.00             | 3,100.00             |
| 6551 Kitchen Equipment & Supplies            | 953.24               | 750.00               | 900.00               | 750.00               |
| 6560 AV & IT Expenses                        | 7,004.65             | 2,900.00             | 7,600.00             | 6,000.00             |
| <b>Total 6500 Facilities &amp; Equipment</b> | <b>\$ 70,311.92</b>  | <b>\$ 67,465.00</b>  | <b>\$ 98,009.00</b>  | <b>\$ 80,050.00</b>  |
| <b>6600 Board/Committee Expenses</b>         |                      |                      |                      |                      |
| 6610 Board Expenses                          | 810.85               | 700.00               | 621.37               | 2,000.00             |
| 6620 Congregation Events                     | 275.49               | 2,000.00             | 1,049.42             | 2,000.00             |
| 6630 Committee, Leadership Development       | 120.00               | 300.00               | 59.38                | 300.00               |
| 6635 Committee, Stewardship                  | 1,088.25             | 4,000.00             | 1,734.09             | 4,000.00             |
| 6636 Committee, Auction                      | 300.00               | 1,500.00             | 754.64               | 1,000.00             |
| 6650 Team, Adult Spiritual Development       | 870.50               | 1,300.00             | 419.92               | 1,000.00             |
| Teaam, Pastoral Care                         |                      |                      | 0.00                 | 300.00               |
| 6655 Team, Aesthetics                        | 425.42               | 700.00               | 745.67               | 1,000.00             |
| 6660 Team, Art Resources                     | 251.01               | 800.00               | 425.95               | 1,500.00             |
| 6665 Team, Library                           |                      | 300.00               | 0.00                 | 100.00               |
| 6670 Team, Membership                        | 231.25               | 500.00               | 189.56               | 500.00               |
| 6675 Team, Social Justice                    | 12,000.00            | 12,000.00            | 12,000.00            | 14,000.00            |
| <b>Total 6600 Board/Committee Expenses</b>   | <b>\$ 16,372.77</b>  | <b>\$ 24,100.00</b>  | <b>\$ 18,000.00</b>  | <b>\$ 27,700.00</b>  |
| <b>6800 Other Expense</b>                    |                      |                      |                      |                      |
| 6810 Bank Fees                               | 3,770.47             | 3,300.00             | 3,380.00             | 3,300.00             |
| 6820 Insurance Expense                       | 11,393.00            | 15,757.00            | 11,250.00            | 12,250.00            |
| 6850 Miscellaneous Expenditures              | -1,313.89            |                      |                      | 0.00                 |
| <b>Total 6800 Other Expense</b>              | <b>\$ 13,849.58</b>  | <b>\$ 19,057.00</b>  | <b>\$ 14,630.00</b>  | <b>\$ 15,550.00</b>  |
| <b>Total Operating Expenditures</b>          | <b>\$ 556,041.05</b> | <b>\$ 624,635.00</b> | <b>\$ 616,966.00</b> | <b>\$ 666,998.00</b> |
| <b>Total Revenue (from above)</b>            | <b>\$ 556,658.16</b> | <b>\$ 625,400.00</b> | <b>\$ 615,620.00</b> | <b>\$ 668,850.00</b> |
| <b>Net Operating Revenue</b>                 | <b>\$ 617.11</b>     | <b>\$ 625,400.00</b> | <b>-\$ 1,346.00</b>  | <b>\$ 1,852.00</b>   |