

Annual Report

2021-2022



**UNITARIAN UNIVERSALIST
CONGREGATION OF MARIN**

Unitarian Universalist Congregation of Marin

Our Mission

To inspire joy and justice in an imperfect world, we:
Share life's journey,
Celebrate many paths, and
Act to make a difference.

Board of Trustees 2021-2022

Ted Gaebler, President

Janice Prochaska, Vice President

Gretchen Leavitt, Secretary

Margy Eller, Treasurer

General Trustees:

Ed Berg

Mary Bicknell

Rich Cohen

Ken Ross

Anne Spatola

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President's Report

Ted A. Gaebler, President, Board of Trustees

Addressing Challenges and Changing to Thrive

FIVE YEARS! WHAT A WONDERFUL FIVE YEARS!

Since I was elected president of the board in June 2017, I will complete my five years of service to the community this June, and both Vice President Janice Prochaska and I will step aside. I also serve on both the Finance and Personnel Committees and will continue to serve there.

We have had an expansive and dynamic fourth year with our Developmental Minister, Rev. Marcus Liefert. He continues to be a catalyst for change and an inspirational leader in challenging times. Our contract with him is for five years, so we face the need to plan for the future when his time with us is concluded in June 2023. So we have launched a Search Committee that will seek a new settled minister. Plus we are exploring the idea of our first-ever capital campaign.

Both Vice President Janice Prochaska and I thrive on change, so we have had a dynamic partnership in exploring strategies to enhance the church community and improve our structure and guidelines in a congregation that was established over seventy years ago.

We celebrate several achievements:

- 1. COVID-19:** We surmounted the challenges that we faced from Covid-19 by finding talented members who have technology skills so we could continue our services on Zoom and continue to meet individual's spiritual and community needs. With the expert assistance of Dave Tetta and a small committee, in August 2021 we returned to our building on the hill and offered a hybrid experience: individuals could attend in-person services wearing masks or click on the Zoom link to engage. A team of tech experts led by Rich Cohen continues to make this capability possible. Kudos to them. Maintaining a high quality of our Zoom experience is an important factor in marketing our congregation to potential new members.
- 2. Living Our Mission:** We have clarified and adopted new Vision and Mission statements and have empowered leaders to be engaged in bringing our values to life. The Social Justice Team has been providing leadership under Linda Haumann to energize the Marin Organizing Committee in order to have a positive impact in the community. Also, Rev. Marcus has been a visible leader in this outreach effort.
- 3. Strong Leaders:** Many members have stepped up to handle a variety of church leadership programs. Janice has been an inspired catalyst for the Leadership Council where we communicate quarterly on our challenges and achievements in various program areas. Leaders are engaged: 35 attended the last meeting, three by Zoom. The Worship Associates have been a growing vehicle for engaging individuals new to the congregation. The board has attracted strong leaders over the five years and engaged in an annual leadership retreat so they could set goals and enhance connections.

- 4. Church Management:** The Executive Committee, which is the officers of the board, meets monthly with key staff to address the current issues and to plan for the future. This simple step has enhanced communication and advanced our ability to solve problems. We have changed our software to Breeze and QuickBooks in order to achieve more reliable and timely reports.
- 5. Gifted Minister:** Rev. Marcus has many gifts. He is an inspiring minister, an effective collaborator with church leaders, and a pragmatist who understands our management needs and how to tap UUA resources. He has creative ideas on solving thorny personnel and financial issues that we have faced. He is both smart and kind-hearted. And Marcus is great fun.
- 6. Generous Members:** Over the bumpy road created by the COVID crisis, our members have maintained their commitment to our community. Many have elevated their pledges, so we remain in a strong financial position. We continue to meet the challenges of community engagement by offering hybrid services on Zoom and also in person. This flexibility has kept our congregation connected which was evidenced by our strong pledge campaign where 98% of members pledged a total of \$310,000 for the next fiscal year.
- 7. The Rose Circle Legacy Campaign,** led by Joan Smith, Claudia Brown and Linda Klein, was launched with a luncheon on October 8 to acknowledge 26 people who have included UU Marin in their estate plans. The intention of the legacy campaign is to promote long-term stewardship and to raise peoples' awareness of how they can dedicate funds to the endowment through their estate plans as well as give while they are still active members.
- 8. Talented Staff:** We are committed to investing in a strong religious education program led by Rev. Lynne Scarpa and her team in order to better serve children, youth and families. We enjoyed the talents of an Intern Minister, Joe Gabaeff, who mentored the teens, led a Soul Matters group, and experimented with a variety of sermons. We hired a new church administrator, BE Lundy, and a new person to handle church rentals, Alisa De Palma.
- 9. Appreciating Volunteers:** We continue to identify a Volunteer of the Month to recognize the creative energy of our members in transforming our values into action:
 - August: Judy and Jim Finn for hanging all the new blinds and washing the windows.
 - September: Susan Mathews for her tireless work with the Personnel Committee helping to hire the new administrator, spending a week volunteering with OWL camp, keeping the health and safety of the congregation in the forefront, offering legal advice, and willingness to pitch in where needed.
 - October: Thomas Ervin for initiating the first on-site retreat at the church.
 - November: Anise Feldman, for her tireless work on the Tech Team, heading up Worship Associates, and contributing to the Safety Team.
 - December: Joan Smith for launching the Rose Legacy Circle, feeding the congregation at Deck the Halls, providing soup to go before the October congregational meeting, continuing to bring food to Trans HeartLine, and currently leading a small task force to redesign the Clara Barton Community Room.

- January: Ali Jenkins for revitalizing the Partner Church program, reconnecting with our Partner Church in Hungary, sponsoring an all-church potluck focused on Hungarian food and stories and publishing Hungarian recipes in the church newsletter.
 - February: Ann Carden for her work as a Zoom host and organizing our discussion of racism topics and the proposed 8th Principle.
 - March: Norman Davidson for all that he does to keep our grounds, facility and operations running smoothly and pitching in wherever needed.
 - April: John Eller for his leadership of the visioning process.
 - May: Henry Bankhead for his culinary contributions.
10. **Enhancing the Building:** With a 58-year-old building we face many challenges that need to be addressed including repairing structural issues and improving the appearance. The capable leadership of Jim Harrison is one asset tapped to solving these challenges. Susan Mathews, John Eller, and I also scoured the city and county records so we could clarify our status and evaluate the value of the property. The congregation decided to stay on the hill and are exploring ways to improve it. A clean-up team of 25 enthusiasts looked in every nook and cranny of the building to see what was still of value and what should be recycled. We purged old records, painted the walls and laid new carpet to enhance our aesthetics. A new sign on the outside of the building was designed with the chalice and the words Unitarian Universalist Congregation of Marin.

Finally, I commend and appreciate our talented staff and our visionary board: Janice Prochaska, Vice President; Margy Eller, Treasurer; Gretchen Leavitt and Susan Mathews, Secretary; Mary Bicknell, Ed Berg, Rich Cohen, Ken Ross and Anne Spatola. We have a great team.

Thankfully,



Ted Gaebler

Vice President's Report

Janice M. Prochaska, Vice President, Board of Trustees

Reflections on Five Years

It has been an honor to serve the Unitarian Universalist Congregation of Marin first as a general trustee and then as the vice president for four years with skills in organizational change, with encouragement from our Developmental Minister, Rev. Marcus Liefert, and with requests from the Leadership Council. The first task as vice president was to create a UU Marin Organizational Chart so that we all could visibly see the Governance Policy focus (Committees and Task Forces) and the Ministry Program focus (Mission and Teams) of the congregation.

To bring the organizational chart to life, first the bylaws needed to be revised. Numerous working bylaw meetings added our new mission statement to the preamble; added a provision that the board evaluates the minister at least once a year; added that a negotiated resignation, if so needed, would be done between the board and the minister; permitted voting via video-conference; raised to 85% the affirmative vote of membership for calling a minister; gave the minister authority and responsibility for all ministry activities of the congregation; and added teams to do ministry activities and achieve practical results.

The congregation voted and accepted the Amended Bylaws on October 11, 2020. To support the revised bylaws, a Board Policy Book was written following many of the guidelines outlined by Dan Hotchkiss in *Governance and Ministry: Rethinking Board Leadership*. Then the teams in 2021 worked on revising their UU Marin procedures to fit the new organizational chart.

Finally, RASCI charts were written by every Team and Committee to clarify who was **R**esponsible, **A**ccountable, a **S**upport, **C**onsulted, and **I**nformed for each team or committee task. Contributing to all these new structures and changes were four board retreats and sixteen Leadership Council meetings to reinforce the changes evolving.

It has been a productive five years with a strong board and now 35+ members of the Leadership Council enthusiastically leading UU Marin into the future.

Minister's Report

Rev. Marcus Liefert, Developmental Minister

At the end of my fourth year serving as your developmental minister, I find myself proud of the work we've done together and curious to discover how we will learn and grow in our final year of ministry together. We end this year by celebrating a pledge drive that broke through the \$300,000 goal we've worked toward for years, saying goodbye to our Ministerial Intern Joe Gabaeff, and honoring the 5-year leadership tenure of our Board President and Vice President, Ted Gaebler and Janice Prochaska. And this ending is also just the beginning of the search process that will run through the heart of our common life over the next year.

Looking Back: An Unexpected Turn on Our Path

This has been a year of adaptation as we returned to offering in-person services and programming. None of us could have predicted, when we set off to work on our five developmental goals over five years, that a pandemic would cast such a large shadow over that time. What have we lost through this portal of change that was unexpected and unchosen? What have we gained? How has the pandemic influenced our development?

As the pandemic began, we had to rethink how we were approaching our third and fourth developmental goals, which focused on long-range and financial planning. In January 2022 we returned to a question we had originally expected to answer in the fall of 2020: whether to pursue a capital campaign as part of our developmental ministry. In April we completed the first phase of an initial visioning task force dreaming into what might be needed and possible from a capital campaign, and as I write, Linda Haumann and Christopher Gilkerson are exploring how and when we might proceed to work on such a campaign, with the help of outside consultants. Our timing in this work has slowed from what we originally planned, and we may or may not be able to finish a campaign by the end of our five years. However, we've already made significant progress in adopting a statement of our vision, determining to stay in our current location and invest in our aging building, decluttering and revitalizing our rooms and offices, and we are beginning to build enthusiasm about what more is possible. This year we inaugurated our first roster of members into the Rose Legacy Circle, honoring those who have made planned gifts to UU Marin. By the time this report is published, the hard work of the team Joan Smith led to re-imagine and spruce up the Clara Barton room into a new Community Room will have finished. So much is possible, and all the signs I see point to a congregation embracing a future full of hope and vibrant life.

Developing a capacity for hybrid services was not on our list of goals when we set off together four years ago. As necessity inspired us to new goals, a heroic team of those willing to learn new things about technology emerged and led the way. Thank you Rich Cohen, Anise Feldman, Dave Tetta, Dave Haumann, Rich Panter and Stephanie Guidry for your willingness to dive into new territory and make the magic of inclusive community possible through a year when each of us has had to navigate thorny questions about safety and for what is it worth risking exposure to a still-deadly virus. And thank you to Walter Coole and Owen Dearborn for stepping into paid positions to shore up that effort. We had a year of flying the plane while building it, and we seem to have made it more or less intact thanks to you all, and everyone who helped with hosting Zoom, providing technical assistance, offering feedback, and giving to support the additional costs of hybrid church.

Looking Forward: A Strong Square and an Energized Blob

In January I spent a week studying with colleagues, a long-delayed conference of professional development. One of the concepts we discussed at our Institute for the Learning Ministry felt particularly relevant to the work we have been doing: organizational squares and blobs. The idea is to distinguish between square organizations that have high degrees of structure and formality, including the four B's (Budgets, Buildings, Bylaws and Boards), and blob organizations that are driven by a more amorphous energy, a sense of mission, spontaneity, and organic collaboration. The originators of this idea observed that square organizations like governments and foundations go around trying to get blobs to "grow up" and become squares. You can watch a short, humorous video about the concept here: <https://vimeo.com/42332617>.

When I began this developmental ministry with you, I devoted a fair amount of focus to the square dimension of the congregation. I centered the importance of role clarity, and from there we developed RASCI charts, revised job descriptions, worked on board policies and procedures, created a new organizational chart, updated the bylaws, and worked on plans for the building. This has all been good and important work. But thinking about the model of squares and blobs this year, I realized it's also important to remember not to *overemphasize* this work. Because the beating heart of any spiritual community is not the solid square structure of its organization but the more ephemeral, *je ne sais quoi* of its blobby-ness. It is the sense of mission, the aliveness of the community, the quality of relationships and shared experience that something real and important is emerging amongst us. The purpose of developing a strong foundation of the square dimension of our congregation is to support the aliveness of our blob, and as your minister I've been trying to remember and trust that aliveness as I organize my time and efforts.

Sometimes this means letting a committee or team fade away for a time. Leaving some part of our congregational ground fallow can invite important questions about the nature and purpose of religious community, and to discover where our vital energies actually lie, if we are not busy harnessing them for a sense of duty or obligation. After a period of fallow time, Adult Spiritual Development has re-emerged this year and provided wonderful opportunities to deepen and grow. Our Membership Committee has been in transition as well—Gretchen Leavitt and Christine Kraemer have valiantly kept ushering and greeting alive while we wait to see if seeds planted for a new Welcoming Team will sprout and grow. As BE Lundy has taken on the tremendous task of learning how to be our Administrator with care, skill and dedication, we've found a need to grow our rental program, which so many have remarked was Janette Morrow's baby, into a more mature program owned by more staff and lay leaders. We hired on church member Alisa DePalma to be our new rental coordinator, and a lay team of Mary Bicknell, Norm Davidson and Dick Park has convened to help develop the program. Our congregation is changing and growing, getting comfortable with releasing things that aren't serving, leaving space to see what is emerging, and embracing new possibilities.

Who knows where we'll end up next?

With you on the journey,



Rev. Marcus Liefert

Treasurer's Report

Margy Eller, Treasurer

Overall, we seem to be on a more even keel as we emerge from two years of restricted activity due to the Coronavirus. We have a full-time administrator and a new rental coordinator who is getting up to speed. Rentals are picking up, and the faithful giving by our members and friends in pledges, weekly basket contributions and other financial gifts have made our financial situation feel stable. The Rose Legacy program was successfully launched with additional contributions to our endowments and promises of future legacy gifts.

Not surprisingly, our expenses are going up with in-person services, a dynamic technical team for hybrid services and capabilities for renters, higher PG&E bills in the winter with more renters, building repairs, supplies, etc. As we move into our next fiscal year, we will reward our loyal long-term staff with cost-of-living increases which also means higher taxes and retirement payments by us.

We did not have any fundraisers this past year which means we may have a shortfall by the end of June. To address this potential deficit, we may periodically request additional contributions in the form of "Fund a Need". To serve our mission and look for ways to grow our membership and bring in young families we continue to support our biggest expense line item of personnel. To have an attractive setting for our services, activities, and renters we need to keep our building in good repair and updated when we can—our building expenses come in 2nd in our expenses. Administration is 3rd with support for members, staff, and managing our finances. Hopefully a review of all our budget line items reinforces purpose in our short- and long-term goals. And as always, any financial gifts you want to send our way will be most appreciated.

The following is a chart of our budget for 2021-2022 compared with our estimate of total revenue and expenses ending June 30 as well as our draft budget for 2022-2023. Also included are the recent balances in our bank accounts and endowments. This will also be posted on the Financials page of our website <https://uumarin.org/members/financials/> where we will also post our final numbers when we close the books on 2021-2022.

Thank you one and all for your support, encouragement and patience with all that we aim to accomplish in our beloved church on the hill. And a special thank you to our hard-working Finance Committee members: Mary Gilstrap Davidson, Margaret Johnston, Judy Finn, Dick Park and Ted Gaebler.

Endowments as of 4/30/22:

General Endowment: \$347,527
Wesley Endowment: \$131,636
Religious Education: \$120,302

Bank Accounts as of 5/15/2022:

Operating Account: \$ 61,649
Restricted Account: \$ 34,132

Administrator's Report

BE Lundy, Administrator

Last August I had the good fortune to become the new congregational administrator of UU Marin. As a former office manager at a UU congregation in upstate New York, and after spending two decades as a freelance violinist and working for arts nonprofits in the fields of development and communications, I was excited to return to the working world of Unitarian Universalism. There is nothing like working for an organization that aligns fully with one's values and spirituality.

The shoes I had to fill here were big, and I hit the ground running. There was much to learn and much to take on. I would especially like to thank Mary Gilstrap and Norm Davidson for their indispensable guidance and help when I first started in this role, and Rev. Marcus for his unfailing support and encouragement. The work has been intense and tremendously rewarding. I've enjoyed getting to know many wonderful congregants and look forward to forging new connections. It's also been a joy to play music for Sunday services with the amazing Milton Wong.

Throughout the year I've enjoyed the opportunity to partner with committees and teams including Stewardship, Adult Spiritual Development and Social Justice to help further their missions to increase the depth and vibrancy of congregants and community.

The Board of Trustees, taking into account the importance and time commitment of our rental program, supported the creation of a much needed position—that of rental coordinator. In February, Alisa De Palma was hired for this role and has been doing a fantastic job, and we are excited for the possibilities of expanding UU Marin's presence as a rental venue in the community. We have already gotten several event inquiries for 2022-23 (weddings, memorials, parties) and are welcoming new and returning renters to in-person meetings.

I look forward to continuing to partner with the members, staff and board of this special community, doing everything I can to promote UU Marin and keep operations running smoothly.

Adult Spiritual Development (ASD)

Ann Carden (Chair), Janice Prochaska (Board Liaison), Kim Holscher, Kate Hudson, Linda Klein, Sandra Levitan

Mission Statement

The Adult Spiritual Development Team coordinates presentations/conversations for adult members/guests relevant to the seven principles of Unitarian Universalism.

Purpose

The ASD team:

- coordinates single-session and multi-session conversations for adult members and guests
- is facilitated by UU Marin members or by outside experts
- is designed to support our UU Marin mission and our UU principles
- complements our many ongoing congregational life groups

Meetings

Our team meets virtually on the third Monday of the month from 2:00-3:00 PM. We welcome new members any time or guests who just want to listen or to offer suggestions. Contact ann.carden.phd@gmail.com for link.

Conversation Series Conducted 2021-22

Mentoring as Spiritual Practice – two eight-session courses

Writing your Ethical Will – two-session workshop

Aging With Wisdom and Grace – multi-faceted series of conversations

Race - the Social Construct – four-session conversation

Understanding the Eighth Principle – four-session course and six single-session conversations

Conversation Series to be Offered 2022-23

August

Deep Listening - multi-session series, time and location TBD (facilitated by Charlotte Maitreya Cramer)

Hymn Sing – Sunday, August 14, 12-2 PM, Fireside Room or Courtyard (facilitated by Ann Carden and UU Marin musicians)

September – November

Ongo - a 12-session small group series, time and locations TBD (shared leadership)

Healthy Communication 101 - single-session series of conversations, time and location TBD (facilitated by the ASD Team)

Botermans

Karen Auroy, Ed Berg, Margaret Johnston

The Botermans Endowment is managed by three trustees in accord with its charter to benefit members or employees of the congregation and their family members who are in need as a result of a disability. Any member of the congregation may make a request for financial assistance on their own behalf or that of another member or employee. Often, requests to the trustees come via the minister who has become aware of the needs of a congregant. The trustees are empowered to make distributions from the endowment after reviewing the validity of the request. Beneficiaries' names are kept confidential.

The Trust provided significant support to one applicant during FY 201-22. A total of \$11,180 has been provided and an additional \$4,500 to this recipient is anticipated.

The Botermans Endowment is invested in A Vanguard Social Index fund and a Bond Index fund.

- The balance in the Botermans Endowment as of July 1, 2021 was \$219,694.01
- The balance as of the statement of April 30, 2022 was \$193,730.44.

The current value reflects the recent market downturn.

Committee on Shared Ministry (COSM)

Carol Kerr (Chair), Lee Fitzgerald, Ben Gale, Dick Park, Tiffany Rowe, Mikey Songster

The Committee on Shared Ministry is appointed by the board for the purpose of providing 1) support and 2) feedback to the developmental minister and the board on collective progress on the 2021-2022 Developmental Goals included in this Annual Report. We also have ongoing responsibility for monitoring our shared ministry to each other. The year 2021-2022 continued the pandemic experience of virtually “shared ministry” as the congregation adapted to ongoing precautions and advancing strategies to use technology to stay connected and make a difference, even at a distance.

The committee meets monthly across the church year to be a resource and sounding board for Rev. Marcus. A major task during his developmental ministry has been to observe, describe, and evaluate the effectiveness his work in our shared ministry with formal written evaluations required by 1) the UUA Developmental Ministry Program and 2) as part of Rev. Marcus’ continuing career progression toward Final Fellowship. We submitted a third and final end-year evaluation to UUA in Boston last June for review and Rev. Marcus was notified in October of his approval for Final Fellowship by the UU Ministerial Fellowship Committee (MFC). We will celebrate this as a congregation with him on June 12 and he will be formally recognized at the UUA General Assembly in Portland later that month.

Historically the COSM was charged with guiding the use of our congregational Covenant of Right Relations if it is needed to resolve a conflict, but that specific task (when needed) is now delegated to the Healthy Congregations Team (HCT) who has the specific mission “to prevent, mediate, and resolve conflicts between individuals and groups within UU Marin” and we stay in communication with them.

We continued to offer feedback to Rev. Marcus on the process of returning to in-person services and sermon delivery styles. We also have consulted across the year on ways to manage phone, email, and in-person meeting scheduling while preventing ministerial burnout and on the tone and timing of stewardship deadlines. We’ve also talked regularly about how to approach the reality that as a developmental minister he is meant to depart and there will be important shared ministry work in being able to collectively let him go and accept new leadership as planned.

Based on what we see and hear from the congregation, there continues to be strong, warm support for the quality of Rev. Marcus Liefert’s ministry at UU Marin and our shared goals and ministry as we begin the work of searching for a settled minister after his concluding year as our developmental minister.

Crafting for a Cause

Anise Feldman, Christine Kraemer (Co-Leaders)



Crafting for a Cause, within the Social Justice Committee, completed its seventh year of providing handmade items to benefit those in need as well as the UU Marin coffers. Co-leaders Anise Feldman and Christine Kraemer, with support from Craig Cohen, have held twice-monthly Zoom gatherings for those knitting and crocheting scarves, hats, socks and blanket squares, primarily for the group's long-running campaign supporting Syrian refugees. Tribal members living in poverty on the Pine Ridge Reservation in South Dakota have also been recipients of warm items this year.

The group's flaming chalice face mask project continues to offer high-quality, handmade face coverings featuring four chalice designs to choose from, sewn by Anise and

Craig, then finished and shipped by other members of the crafting team. (Still available at <https://uumarin.org/chalice-masks-still-available/>.) Additionally, for each mask sold, the crafting team sewed and donated a face mask to the Multicultural Center of Marin for distribution in the Canal district of San Rafael. The total number of masks the team has donated to MCM is actually over 400.

Crafting for a Cause has provided an opportunity for at least two dozen members and friends to participate in providing warmth and safety to people in need, as well as the chalice mask fundraiser.



Facilities Committee

Jim Harrison (Chair), James Finn, Norman Davidson, Thomas Irvin, Steve Prince

Downstairs Moisture Problems

We have been fighting the water seepage problems in the Wright Room since I got on this committee five years ago. Back then we actually considered digging a trench through the concrete floor in the Wright Room and putting in a drainpipe. Even more difficult than you might imagine.

We managed to successfully seal up the wall in the Wright Room, the bottom quarter of which (18 feet wide) had been wet after every rain for years. And, it was OK until the big rains in this December of '21. At my home, I got 9.6 inches of rain in one day, according to my rain gauge, and two inches the day prior. After that rain we had some water on the floor, in the northeast corner, that soaked the carpet in an area of about five feet by four feet.

In looking at the original building drawings once again, John Eller spotted what looked like a buried drainpipe running behind that very Wright Room wall. I found what looked to be that pipe and had our sewer guy come in with a camera and a cleanout machine. It was totally blocked with roots. The camera could only get through part way, however their smaller clean-out tool got around all the bends and out to a total of 106 feet. And that's almost to the end of that pipe (according to the original design drawings), directly behind the Wright Room wall. This was all done in early 2022.

We found a second pipe that comes out behind the building on the south side and it was completely stopped up with roots. We dug down five feet or so and broke it open. We were able to clean it out up to a spot under the patio beside Fellowship Hall, but found the pipe had collapsed there. It is probably 12 feet down below the patio surface. We rerouted the pipe on the south side with new pipe and installed a clean out (the white pipe sticking up).

We also, in late 2019, closed up the furnace air return pipes that are/were built into the concrete floor in the Wright Room—two of them on the north side of the room. The metal pipe that was in there had totally disintegrated, leaving nothing but gravel and dirt. These are the air intake pipes to the furnace. We had a furnace company come in and they closed off that intake in the furnace room and made a new one going into the adjacent closet room. They then added a new vent from that closet into the main room (We must take care that the vent between the closet and the furnace room is not blocked with closet junk.).

All the piping in the furnace room was then replaced and cleaned up. We recently filled the two old pipes in the floor with concrete and will put a patch of carpet over them soon.

We bought dehumidifiers for the Wright Room and the Robinson Room and, if they get emptied, they help a lot. There was also a broken sink drainpipe in the dirt room and that was repaired.

Exterior Fixup Around Fellowship Hall

We have an excellent maintenance man. His name is Craig and he's the one that made our front door look beautiful again last year. He's not real fast, but he's meticulous and gives us a very good hourly rate. Right now, we have put him to work on the exterior wood and siding around the upper part of Fellowship Hall. If you look at the area between the windows up at the top of the room – in some of this area on the west side of the building the wall has completely rotted out. Craig made a large hole completely through the wall there in four places. He has replaced it with 4x6 redwood and is now working on the south side, which is in better shape but still in dire need of repair. He will check and repair all around up there. When he completes that area and sands and paints it, he will start on the fascia board above the windows, which is completely rotted out in eight or ten places. That's probably a 30-hour task. Then that will be sanded and painted. When that is complete, I want to consider putting a coating on the entire roof surface. Expensive and requires pressure washing, which takes water, but will extend the life of the roof another five to ten years. Probably \$4,000.

Other Stuff

The posts for our main sign at the bottom of the driveway rotted away and it fell over. Jim Finn and Jim Harrison got a new sign done, got new eight-foot posts, dug holes and put them in concrete.

New lighting was installed in BE's office, half of Lynns office, and all the lights in Joan's fancy remodeled Clara Barton room.

We leveled it. We hired three workers and got the patio bricks leveled. We had gotten some of this done a year ago.

TV up. Purchased and mounted the 65" TV on the wall in the Fireside Room and mounted the camera for Zoom meetings.

We have installed a wireless TV camera looking at the front door. BE, or anyone else, can see what's going on there 24/7 using their cell phone. It has infrared lamps for night vision. And, it has a motion activated 1-minute recording that is stored onto a memory card and can be viewed and downloaded any time.

We installed a wireless doorbell at the front door so if it is locked, a person desiring entry can alert someone inside.

We replaced both faucets in the women's bathroom. The handles on the old ones were wobbly and not fixable.

We replaced the hardware on the Dream Room sliding door.

Working on replacing feet on damaged chairs in Fellowship Hall.

Family Ministry Team

Sarah Tiederman (Chair), Rich Cohen, Carol Kerr, Onno Koelman, Susan Mathews

Mission: To grow resilient, resourceful youth and families, we: create caring connections and traditions; invite curiosity and spiritual exploration; explore ways to build a better and more compassionate world together.

Vision: To grow Religious Exploration by providing consistently engaging programs led by professional anchor teachers for each age group while supporting and connecting families.

Overview

Director of Family Ministries, Rev. Lynne Scarpa has skillfully led us through this second year of transitions necessitated by the ongoing COVID-19 pandemic. The past two years have been challenging ones for youth and children. The Family Ministry Team has been continually impressed by Rev. Lynne's ability to stay grounded, to plan effectively, and to make the most of our resources during her two-year tenure. She has consciously nurtured and grown her staff's leadership capacity (the "professional anchor teachers" from our vision) in a noticeable way, which means the program is well-positioned for future success. We thank the UU Congregation of Marin for continuing to invest in RE as we build a program to ensure the future of our community!

Teen Programs: 12-18-year-olds, Middle School and YRUU

Youth elected to have one youth meeting a month—often with a theme, for example, a pizza party night, and a very successful Dim Sum evening—and then the rest of the time participate in adult/intergenerational programming on Sundays. We are especially grateful to 10th grader Owen Dearborn who has been handling the complex camera and computer operations for many Sunday Zoom services. Up to seven youths from UU Marin have attended programs at one time. Five are regular attendees. Some have brought friends. Additionally, two high school seniors attend programs when they are not involved with jobs or school. This means that all youth who were regular participants in our programs two years ago pre-COVID (and whose families have not moved out of Marin) continue to be engaged.

Children ages 3-11

This age group participates in an interactive program provided every Sunday which starts in the main 10:30 AM Sunday Service and continues outside with separate age-appropriate activities. During the past year, 17 children in this age group have attended more than once. Weekly attendance ranges from four to ten youth. We continue to see growth in the number of total attendees in this age group.

Infants to children 2 years old

Prior to the Omicron variant surge in January, we had five children in attendance. Post surge, we have two regular attendees and three more who have participated with their parents in attendance. This group is still not eligible for vaccines. With that in mind, staff has done a remarkable job of providing safe and engaging programming for this age group.

Monthly Kids' Night/Parents Night Out Introduced in October

Consistently attended by four to six elementary school-age children, supported by two high school-age youth who are in training to be Summer Chalice Camp Counselors and Family Ministry Team staff. Successfully repeated in November, put on hiatus in December and January, resumed in February, March, April and May. We are positioning this event as yet one more way to invite new families into the UU Community.

Year in Review:

Summer

Our RE year began in early June with an in-person Bridging event at UU Marin with two high school seniors and their masked families in attendance. Later in June, we helped host and participate in an intergenerational Solstice Celebration at the beach. In August, we hosted our first-ever combined OWL & Nature Summer Camp for children and youth aged five to fifteen. This was very popular: 29 children and youth signed up! Revenues exceeded expenses resulting in a net profit of \$4,304.62.

Fall



The fall was full of meaningful, safe and joyful events. Retired pediatrician, Debra Bright stepped into her new role as Early Childhood Coordinator allowing us to offer nursery care for infants and toddlers with up to five infants and toddlers participating. RE staff supported the Congregational Retreat at UU Marin with eight children in attendance, which was so popular that some didn't want to leave. Five UU Marin teens and one child participated with five teens from Napa and Santa Rosa UU in an overnight Spiritual and Service Retreat at Fort Ross.

In October, four teens shared their personal belief credos in a moving and well-attended Intergenerational Coming of Age Ceremony during the Sunday Service. Teens had fun going to an afternoon at the movies with the Santa Rosa teens later in the month and everyone had fun celebrating Samhain in an Intergenerational Service. November marked a big change as COVID vaccines were authorized for children aged five to eleven which created more opportunities for festive in-person holiday gatherings. We celebrated the birth of new members with a Sunday Service Blessing for four babies and their families. Teens adventured to Chinatown with UU Santa Rosa. December overflowed with jolly in-person celebrations which attracted visitors including Deck the Halls, Santa Lucia, gingerbread house decorating, Solstice and Christmas celebrations.

Winter

A post-holiday January COVID surge with the Omicron variant necessitated a return to Zoom for safety reasons and a related dip in participation. Bucking this trend, at the end of January, seven teens safely gathered to make dim sum and celebrate the Lunar New Year. All children and youth returned for in-person services and celebrated at an Intergenerational service dedicated to Imbolc.

In February our children made valentines for our elders and blankets for children at a family homeless shelter. In March teens had a pizza-making party and all children and youth participated in Holi, a Hindu festival, and a Spring Equinox/Egg Hunt.

Spring

In April, we learned about Ramadan, celebrated Buddha's birthday and shared a traditional Seder meal with the younger kids. The teens met up with others from UUs in Petaluma, Napa and Santa Rosa to explore Japantown. May began with the festive Intergenerational Sunday celebration of Beltane including an incredible original play about rebirth rooted in nature traditions and connected to recent COVID experiences, culminating in a beautiful May Pole Dance. Teens went to the movies together and then to the beach with UU Petaluma teens.



Conclusion

With the support of the Family Ministry Team and UU Marin Congregation, our staff has demonstrated incredible creativity, resilience and flexibility. Building this year upon the structure created last year, we have laid a firm foundation for providing inspirational programs for children and supporting families that will help our congregation continue to grow and thrive.

Facility Upkeep/Replacement

Re-organized Supply Closet

Updated classrooms

Staff

Director of Family Ministries: Rev Lynne Scarpa; Youth Advisor: Joe Gabaeff; Youth Coordinator: Charlotte Cramer (Charlotte will be stepping into the Youth Advisor role next year); Elementary Childhood Coordinator: Luka Coole; Early Childhood Coordinator: Debra Bright

Finance Committee

Mary Gilstrap (Chair); Margy Eller, Treasurer; Ted Gaebler, Judy Finn, Jerry Job, Margaret Johnston, Dick Park

Ex Officio Members: Rev. Marcus Liefert, Developmental Minister; BE Lundy, Administrator

The committee met monthly to review financial statements and other financial issues; additional meetings were held in April to prepare the budget. Rev. Marcus Liefert attended many of our meetings and provided valuable input, and we welcomed Judy Finn as a new committee member. Margy Eller presented updates at the congregational meetings in October and March and at the Budget Workshop in May.

Thanks to generous contributions from our members and friends, our cash flow remained stable throughout the pandemic, and rental income is steadily increasing now that the building has reopened. We now have a full-time administrator and a part-time rental coordinator. A grant from UUA helped us to retain Joe Gabaeff as a ministerial intern for this year. We have also been able to expand our Family Ministries staff, partly due to the 4.5% annual draw from our Religious Education and Wesley endowments.

We continue to give financial support to organizations that reflect our values: the UU Service Committee, Marin Organizing Committee, UU Justice Ministry of California, Marin Interfaith Council, and Spahr Center. Our annual Homeless Appeal raised over \$7,000 to support organizations that serve people in need of food and shelter in Marin.

Each spring, the Finance Committee proposes a budget for the coming program year and presents it to the Board of Trustees; the draft budget for 2022-23 was presented to the congregation on May 15. It includes staff cost-of-living adjustments and keeps UU Marin salaries within the UUA Fair Compensation range for our region. Our goal is to bring rental revenue back to pre-pandemic levels. In addition, we are proposing a *Fund-a-Need* program to balance the budget. A final budget will be voted on by the congregation at the Annual Meeting on June 5.

Legacy Sub-Team

Joan Smith, Claudia Brown, Linda Klein, Anne Spatola (Board Liaison)

Mission: We collaborate to promote and honor the gifts of Long-Term Stewardship to the UU Marin Congregation

History: In August, we approached the board to approve a Legacy sub-team of Stewardship to support the long-term stewardship of the congregation and to recognize and celebrate those who have made a legacy designation to UU Marin. We proposed that the Rose Legacy Circle be established for this purpose. Suzi Schell designed a logo, which we have used on a brochure and a commemorative pin.

Activities: This sub-team is a collaboration between Stewardship, the Endowment Committee and the Adult Spiritual Development Team (ASD). Our first program was held during the Family Retreat on September 18, 2021. Elizabeth Kravatski (an estate lawyer, neighbor of Claudia Brown and advisor on legacy programs) organized a presentation around the theme of Aging Wisely and presented information on resources for aging, organizing your personal affairs and end-of-life care. The program was well attended and received. Participants requested additional programs on this topic by ASD.

In November we held what was the first of an intended annual luncheon for those we identified as having made a designation to endowment. 24 people attended our gathering at Piazza D'Angelo in Mill Valley. We gave each attendee their legacy circle pin and our newly designed Letter of Intent form.

In conjunction with the Endowment Committee we designed a brochure for the Legacy Circle and are hopeful that the brochure will be a publicity piece for our long-term stewardship efforts and that the Letter of Intent will serve as the document that begins someone's recognition as a legacy donor.

On March 20, 2022, we held our Legacy Induction worship service, which included Linda Klein as the Worship Associate, Sandy Geller who played contemporary hymns, the children singing "Magic Penny", and testimonials by Christopher Gilkerson and Anne Baele. Our ceremony invited our Circle members to stand before the congregation and the newly inducted members of the Circle Claudia Brown, Linda Klein and Joyce Rhodes were given their membership pins. All members were presented with a rose. The congregation sang "Standing Before Us" and recited the following affirmation:

We, the congregation of UU Marin, invite you into membership of the Legacy Circle in recognition of your commitment to the continuing stewardship of our congregation.

We honor your pledge of financial support. We appreciate the faith you have that the work of this congregation has contributed to the growth of our UU principles within us and throughout our world in the past, the present and will continue this path into the future.

We applaud you. We are grateful to you. We will work to make your legacy a contribution to a vibrant community dedicated to spiritual growth, truth, and justice in our imperfect world.

We are continuing to work to develop a system for accountability so that those who have indicated an intent to leave a legacy have provided the necessary information to our administrator so that we can acknowledge birthdays and follow up as needed.

Partner Church Team

Alexandra Jenkins (Chair), Katherine DaSilva Jain, Kristina Gale, Janice Prochaska, Lynne Scarpa

The Partner Church Team (PCT) had a very active year. In Fall 2021, our team continued to hold regular monthly meetings on the 2nd Tuesday of each month. In October, we began submitting monthly Hungarian-Transylvanian recipes to the UU Marin newsletter as a way to share part of the culture of the Sováta congregation with our congregation in Marin. In December, the PCT held a delicious and festive Transylvanian Christmas dinner potluck in the Fireside room, with 16 attendees (following all Covid protocols). The room was decorated with traditional Transylvanian and other European embroidered tablecloths and was deemed a great success!

December also left us with the very happy news that Reverend Csongor Benedek and his wife Andi welcomed a baby girl—Rebeka—into the world! We sent congratulations on behalf of UU Marin.

In February the PCT organized a Zoom meeting with Reverend Csongor, Reverend Marcus, and PCT members. It was a first-time live meeting for us. We introduced ourselves and also began brainstorming ways in which our two congregations could connect more in the near future.

In March, UU Marin's Family Ministries provided materials for several children in our congregation to create and send traditional Transylvanian Easter and Mother's Day greetings to members of the Sováta congregation. These creations went through the postal service, and we are waiting to hear of their eventual receipt.

As of the writing of this report, Rev. Marcus and Rev. Csongor are partnering on the creation of the June 5, 2022 services for our respective congregations. The services will take place in Sováta and Marin on the same day (at different times) and will share a theme, hymns, and readings. The annual Partner Church Basket Share will also take place this day. We are excited about this new approach to our partnership!

Pastoral Care Team

Karen Auroy (Chair), Sally Schroeder (Secretary), Jerene DeLaney, John Eller, Marge Hollinger, Carol Littrell, Walt Littrell, Carole Rosvold, Gretchen Leavitt (Board Liaison)

Ex Officio members: Rev. Marcus Liefert, Joe Gabaeff

Our Mission: The members of the Pastoral Care Team seek to respond with compassion and respect to the pastoral needs of the members of our religious community.

And we need the help of all our members to be on top of those needs. One of our goals has been to encourage participation by the congregation in the “nuts and bolts” of pastoral care. The message we’d like to make clear is that pastoral care is not the job of a small band of special folks, but is an opportunity open to all members of our congregation.

We see the Pastoral Care Team as the hub of a wheel, and the members as the spokes that make it turn. We hope that when we hear about a challenge that needs to be met, there will be members who’ve volunteered to help meet that challenge. Providing the opportunity is one of our primary responsibilities. You will find a “Volunteer Supporter” form in Breeze that is easy to access and fill out. This May, the form can be reached directly through a link in our Newsletter.

Another goal was reached this year when Jerene DeLaney developed a means of efficiently providing meals to congregants who request them. She has placed an ongoing notice in the Newsletter about meal availability and our hope is that people who would benefit from receiving a few meals will contact her.

Personnel Committee

Susan Mathews (Chair), Ted Gaebler, Dick Park, Ken Ross, Rev. Marcus Liefert (Ex Officio)

Accomplishments for 2021-22

- Worked with Rev. Marcus to identify staffing needs and job search related to the new Church Administrator, Rental Coordinator, Technical Coordinator and Technical Assistant.
- Determined that staff had received annual performance reviews.
- Monitored changes to California law and made recommendations for new practices to maintain compliance.
- Recommended a Cost-of-Living Adjustment (COLA) of 5.3% for 2022-23 for salaried staff to keep in alignment with UUA fair compensation guidelines.
- Worked with the Finance Committee to help identify the need for additional clarity, policies and procedures related to our church finances.

Goals for 2022-23

- Continue to support staff and board in responding to evolving needs as we transition back to in-person work.
- Identify a new chairperson for the committee.
- Review and update our Employee Manual.
- Work with Search Committee to prepare for a successful ministerial transition.

The committee commends the staff and independent contractors for their exemplary service to UU Marin and our members throughout the year.

Current UU Marin Employees

Rev. Marcus Liefert, Developmental Minister

Rev. Lynne Scarpa, Director of Family Ministries

Joe Gabaeff, Intern Minister and Youth Coordinator

BE Lundy, Administrator

Alisa DePalma, Rental Coordinator

Walter Coole, Technical Coordinator

Owen Dearborn, Technical Assistant

Luka Coole, Early Childhood Teacher

Charlotte Cramer, Youth Coordinator

Amanda Morando, Choir Director

Milton Wong, Pianist

Mary Ellen Morgan, Bookkeeper

Independent Contracted Services

Grounds

Janitorial

Retreat

Thomas Ervin, Retreat Leader

We had a marvelous All-Congregation Retreat last September. The retreat was attended by about 50 people. This event was the second time the retreat was staged in the fall and the first time we had a one-day retreat at UU Marin. We look forward to seeing even more of the congregation at our next All-Congregation Retreat coming to you on August 20, 2022, also a one-day retreat at UU Marin. We hope some time in the future to go back to Walker Creek for a weekend retreat.



Hospitality Team

Judy Finn (Chair), Craig Cohen, Joan Smith

Our mission statement is to create a hospitable environment for welcoming members and guests into the fellowship of our congregation. In carrying out this mission we have provided coffee and tea for socializing in the courtyard after all 10 AM services. Beginning in the spring, Henry Bankhead has volunteered to provide wonderful home baked bread items to our coffee hour.

The team is responsible for maintaining the kitchen supplies and has general oversight of the use of the kitchen. We encourage recycling at events and disposing of food waste and napkins into the green cans for composting.

We would love to have new faces to join our team!

Search Committee

John Eller (Chair), Talia Carter, Craig Cohen, Ted Gaebler, Kim Holscher, Dick Park, Joan Smith

The Search Committee is comprised of seven members elected by the congregation. Our committee has started meeting on a regular basis, reviewed the UUA Settlement Handbook that dictates the process of search and established task leaders for the various roles described in the Handbook.

The search process breaks into seven phases that are as follows:

Phase One: Concluding a Ministry Well. This is ongoing over this final year of Developmental Minister Rev. Marcus Liefert's contract. We will make every effort to say goodbye well and to show our great appreciation for his time with us.

Phase Two: Education and Preparation for Search. Our committee has been familiarizing ourselves with the Handbook, the calendar of necessary steps and have assigned various leaders who will be responsible for delivering elements of our package to prospective ministers.

Phase Three: Building the Structure to Search. Key elements of this phase include attending a committee retreat that will be facilitated by a UUA transitions team member. We will share a congregational survey that focuses on congregational assessments and aspirations with the hope of getting full member participation. We will set up and facilitate small group cottage meetings and focus groups. We will arrange a workshop on "Beyond Categorical Thinking" for the entire congregation. We will use the results of these efforts to prepare our Congregational Record and Documents Package that will be available to interested searching ministers.

Phase Four: Opening up the Search. Our package will be reviewed and approved by the UUA Transition team and made available to searching ministers in early December this year.

Phase Five: Discernment and Mutual Selection. We will then begin to receive a list of applicants in the new year. We will embark on an effort of reference checking and interviews that will lead us to selecting three to four pre-candidates. Each will be invited to a neutral pulpit to share a sermon, conversations and interview weekends that will occur in February and March 2023. We will select one candidate to call and can make our first offer as early as 30 March.

Phase Six: Finalizing the Offer. We enter in to contract negotiations with the candidate. We prepare background checks. We announce the candidate minister in mid-April.

Phase Seven: Entering into a New Ministry. We will invite the chosen candidate for the "Candidating Week". The candidate will provide two sermons at UU Marin. The search committee will introduce the candidate to staff and congregational leaders and members. We will conduct a congregational vote after the final Sunday. We will expect at least a 90% positive vote. We will assist in the search for housing and becoming familiar with the local environment. The congregation will issue a notice of Call. We will assist in the preparation for an August start to our new Ministry.

Social Justice Team

Linda Haumann, Chair; Joan Smith, Secretary; Dick Park, Treasurer; Mary Bicknell, Board Liaison; Karen Auroy, Jean Bee Chan, Craig Cohen, Katherine DaSilva Jain, Norm Davidson, John Eller, Thomas Ervin, Anise Feldman, June Fesler, Judy Finn, Lee Fitzgerald, Christopher Gilkerson, Mary Gilstrap, Marge Hollinger, Victoria Holdridge, Kate Hudson, Kristin Jensen, Margaret Johnston, Christine Kraemer, Gretchen Leavitt, Carol Littrell, Walt Littrell, Rev. Theresa Novak, George Pegelow, Janice Prochaska, Joyce Rhodes, Carole Rosvold, Jan Seagrave, Sally Schroeder, Sher Sheldon, Anne Spatola, Jeanine Strobel, Sarah Tiederman, Diana Vine

Mission: To act to make a difference in our own congregation, the larger local community and world. Our Social Justice Program is guided by our Unitarian Universalist principles. We seek to work for the vulnerable in our community in areas such as housing/homelessness, immigration/racial justice and environmental justice. Towards this end, we collaborate with other community groups whose goals intersect with ours.

2021-22 has been a very active year for our Social Justice Team despite the pandemic. We've participated in several actions and causes in our local community and in the wider UU world. The following highlights represent some of our actions:

Housing/Homelessness: Rev. Marcus and Intern Minister, Joe Gabaeff, along with several Social Justice Team members, advocated for Project Homekey 2.0 in Larkspur housingfirst.marinhhs.org/homekey. Along with our partners in the Marin Organizing Committee (MOC), we appeared in person at the Board of Supervisors chambers to speak in favor of the project. After many efforts to derail approval, the Marin County Board of Supervisors unanimously approved the acceptance of a \$15 million grant from the state of California to enable the project to proceed.



*Linda Haumann, speaking on behalf of UU Marin for support of Project Homekey 2.0 at the Board of Supervisors on February 15, 2022.
Rev. Marcus also spoke. Kristin Jensen and Intern Minister, Joe Gabaeff in background.*

Mill Street and Street Chaplaincy Meals: Due to the pandemic, these programs were scaled back. We continued to fundraise through our annual Homeless Appeal and through our basket share program. Homeward Bound, Ritter House and Adopt-a-Family each received \$1,500 as a result of the annual appeal. We plan to return to in-person help with meals when appropriate. June Fesler coordinates cookies for the Street Chaplaincy meals.

Marin Organizing Committee (MOC): Linda Haumann serves as co-chair of the MOC Affordable Housing Team. Mary Bicknell, Kristin Jensen, Victoria Holdridge, Jean Bee Chan and Judy Finn are on this team. Karen Auroy has been working with the MOC Aging and Disability Team. This spring many members attended Accountability Sessions with candidates running for local offices in the June election to highlight issues MOC has undertaken, and to get commitments from candidates to work with MOC if elected. Rev. Marcus co-chaired a session; Linda Haumann, Karen Auroy and Victoria Holdridge also spoke. There was a total of 156 people, representing 23 member institutions.

Environmental Justice: We have been working with Katherine DaSilva Jain via her work with Elders Climate Action.

Racial Justice: Linda Haumann is now part of Marin Promise Partnership, a local organization to promote educational equity. In addition, UU Marin promotes SURJ in Marin via our newsletter.

Non-Partisan Postcarding for the 2022 Midterms: Sarah Tiederman has led an ongoing group, including UU Marin members, who meet weekly to write postcards to districts around the country to encourage them to vote, register to vote and become aware of their rights as a citizen in order to combat voter suppression. In the spring, Sarah held a post-carding party at UU Marin in honor of Lorayne Hansen and her untimely passing.

Basket Shares: The following organizations received basket shares this past year: Unitarian Universalist Service Committee (Ukrainian Refugees), Partner Church in Sovata, Reclaim Our Vote/Center for Common Ground, Enriching Lives through Music, Unitarian Universalist Ministry for Earth. Victoria Holdridge has taken responsibility for coordinating the basket share program.

Trans HeartLine: Joan Smith, representing UU Marin, joined several other congregations under the auspices of the SPAHR Center to provide meals to the Trans HeartLine safe house every other month. Craig Cohen and Carol Kerr help provide meals every eight weeks.

Side With Love Award: Karen Auroy received the 2022 Side With Love Award for her long-time commitment to social justice. When the Rotating Emergency Shelter Team program began, Karen was among the first to make meals and help the planners. She has marched at rallies and showed up to Board of Supervisors meetings to support justice for immigrants' rights. Karen has emerged as a leader of the Aging and Disability team with the Marin Organizing Committee, playing a key role in co-chairing a civic academy and helping that team to advocate to raise the pay for caregivers.

Goals: Continue to show up as a group for civic actions, rallies and meetings in our ongoing work with partner organizations, MOC and MIC including the Sanctuary Congregation Network. Continue work with MOC teams: Affordable Housing, Renter Protections, Youth Mental Health, Services for Aging/Disabilities. Continue to provide food to the Street Chaplaincy program and Mill Street shelter program as needed once opened. Continue the "Basket Share" with monthly themes representing the organizations that fall within our focus areas. Spur more involvement with Environmental justice.

Stewardship

Thomas Ervin (Chair), Gretchen Leavitt, Sally Schroeder, Joan Smith; with encouragement and advice from Rev. Marcus Liefert.

Moving testimonials set the tone for the 2022-2023 Stewardship Campaign. We are grateful for the generous gifts our members and friends provided. We are on the path to sustainability with a budget planned for 2022-2023 that is balanced. In February we kicked off the Stewardship Campaign with a rousing service on January 31.

We emphasized that we were only asking for a promise. No money was required until after July 1, the start of our next fiscal year. We tried to make pledging easier this year. This year we had an online pledge form in Breeze that many people could fill out quickly. Joyce Rhodes and Sally Schroeder sent thank-you notes to everyone who pledged.

We currently have 104 pledging units with most having pledged by the end of February. The last few pledgers finished by early April. Many households have pledged over \$2,000 per year. This level, or greater, makes us sustainable. We have raised \$307,388, which is approximately a six percent increase over last year and finally reached our \$300,000 goal which we have had for the last three years! We made a record short drive as it usually takes much longer. We did receive some criticism of being too abrupt (as in do it now). We will try to be more relaxed next year.

If you signed an EFT form last year, and you are not increasing your pledge, you can continue at the same level. If you are planning to increase your commitment you need a new EFT form. Our current EFTs can run continuously. We are grateful for all who have pledged for the following year.

We had a legacy luncheon last fall and a legacy service in March. You can also remember UU Marin in your will and contribute to our endowment. Many people have already committed to schedule a bequest to UU Marin in their will. If you feel so moved, please add your name to those who have committed to donate to UU Marin.

Tech Team

Rich Cohen (Organizer), Anise Feldman, Jim Finn, Stephanie Guidry, David Haumann
Staff: Walter Coole, Multimedia Operator

Mission: To provide audiovisual support for Sunday services and congregational sponsored events and meetings

Vision: To provide audiovisual support for an engaging experience for both live and remote participants

Overview

The 2021-22 year involves a major transition from the Zoom only Sunday services during the Covid-19 pandemic to hybrid Sunday services for both live attendees and Zoom participants. Significant efforts to adapt Fellowship Hall to incorporate cameras and microphones to enable the new capabilities were developed and installed by the initial tech team that included David Tetta, Rich Panter, Eddie Carden, David Haumann, Ted Gaebler, Anise Feldman, Walter Coole and Rich Cohen. This first phase was completed by September and transitioned to the current team to manage and support Sunday services. A key component was the addition and approval of the board of a new staff person, Walter Coole, to support the volunteer efforts.

The transition from live-only Sunday services to a hybrid format involves an unanticipated complexity not only including new technology, but also significantly increases required support from one volunteer per Sunday for a live-only service to three volunteers per Sunday hybrid service. Anise Feldman deserves a noteworthy thanks and recognition for the significant contributions to the development of a very high-quality Sunday service for our live stream participants. In addition, she developed thorough and detailed documentation that insures consistency in quality from week to week. By the end of this year we have four trained operators capable of handling the video production. Rich Cohen, David Haumann and Walter Coole developed the audio capabilities to support instrumental and choir performances and currently have four trained operators. Each Sunday Service is supported by a video volunteer, an audio volunteer and a remote host to manage the Zoom participation. With the additional volunteer support next year's budget transitions to a Facility Attendant and paid teen leadership model for support of Sunday services and congregational events for next year significantly reducing Tech Team expenses.

With the added technology capabilities in Fellowship Hall, new opportunities were presented to enable these capabilities for renters. These efforts were supported by Walter Coole and coordinated with our administrative staff. A second Zoom system was designed and installed in collaboration with Jim Harrison for the Fireside Room in support of hybrid Sunday Circle services. Rich Cohen also sponsored a Tech Summit and survey which engaged the congregation in imagining and setting priorities for future technology options. Results of the Tech Summit survey are included as an attachment to this report. Efforts to upgrade our original equipment to modern standards that

includes screens in Fellowship Hall and the Foyer are underway with consultation from outside vendors to support design and installation.

Key takeaways for the Tech Team from our hybrid experience this year is to focus our future efforts to prioritize improvements that are easy to use, operate reliably and consistently, require minimal training, and minimizes the time and effort of volunteers. Stephanie Guidry, a lifelong UU and the new addition to our team, has brought a wealth of experience and knowledge from her prior experience in video production in local public TV. With her guidance and a future transition to newer “standardized” A/V technology we can transition support for renters to reliance on outside consultants. This increases the value to the congregation as a revenue source without burdening our volunteer and paid staff to manage technology support for rental purposes.

Technology Summit – Embracing the Future - Valuation Survey – RESULTS

Here is the list of the congregations’ top value rated ideas and options for our next generation audio visual technology.

Top Rated Options:

Sum

Having one or two large LED screen monitors in front of Fellowship Hall, one each side	124
Capability for renters to use facilities with additional charges to cover support, maintenance & costs	116
Front foyer screen showing upcoming events calendar.	115
Partnering for hybrid or online events with other congregations for events, lecture series, clubs, etc.	113
Fellowship Hall Screen Contents: All of the items provided in order of service (Music & Hymn info, reading citation, sermon title, notifications, announcements)	110
Available portable camera for use outdoors or as needed for services	109
For larger rooms, Fireside and Wright Room, large screen monitors for meetings, screenings, etc.	109
Have mobile technology that can be set up in meeting rooms at UU Marin as needed. One for each floor on a secure lockable cart.	108
Fellowship Hall Screen Contents: Capability to show close up of Milton / musicians playing	108
Fellowship Hall Screen Contents: Live stream videos such as music videos	107
Fellowship Hall Screen Contents: Capability to display close up of singers/soloists	103
Fellowship Hall Screen Contents: Music lyrics only	102
Fellowship Hall Screen Contents: Capability to highlight individuals for full-sized image for online participants and/or guest speakers	101
Capability to provide hybrid events for renters and member events: Hybrid yoga, meditation, exercise classes	102

Front Foyer: Interactive touch screen in foyer to provide introduction, announcements, etc. for visitors, events, renters etc	101
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Runner Up Rated Options:	Sum
Attractive retractable screen covers (like a blind that rolls down) to cover the screens when not in use	99
Front Foyer Screen contents showing building layout. Could be interactive to include calendar and option to enter reservation request	99
Fellowship Hall Screen Contents: Capability to display for polling purposes of audience, including ability to incorporate responses from both in person and online participants	98
Front Foyer: Screen showing renter and room calendar schedule with daily, weekly and monthly views	98
Rental Services: Technology support services to members. Provide needed capability to access on-line participation	97

Favored Options	
Fellowship Hall Screen Contents: Music notation and lyrics	96
Front Foyer: Tablet at entrance where guests or welcoming person can enter name, visiting parents enter name contact and children in attendance, etc.	96
Front Foyer: Screen with option for renter to post information for their attendees.	96
Front Foyer: Screen displaying what's happening in RE classroom and upcoming programs	96
Front Foyer: LED screen mounted in foyer with cycling information used to provide general UUCM information	94
Rental Services: Paid technology support services to renters as schedule permits	94

Welcoming Team

Christine Kraemer (Greeter Leader), Gretchen Leavitt (Usher Leader)

The Welcoming Team has continued to offer a warm connection to visitors and regulars on Sunday mornings. Since we reopened, Christine and Gretchen have been collaborating as a team to coordinate details and provide a friendly face to all who enter our doors.

Greeters set up the Welcome Table, invite visitors to sign in, provide nametags, and offer information about UU and our congregation.

Ushers hand out orders of service, tally the attendance, collect joys and sorrows slips to be read in the service, and count money in the collection box afterwards.

We invite anyone who would like to join the Welcoming Team to contact Christine or Gretchen.

Worship Associates

John Eller (Chair), Craig Cohen, Luka Coole, Anise Feldman, David France, Dave Hudson, Ali Jenkins, Linda Klein, Jan Seagrave, Sondra Schwartz

We consider ourselves as a very strong group and support each other and help each other with the various duties of the Worship Associates team.

In the last year the Worship Associate team has six new members with one member stepping away at the end of her term. As a team we have become increasingly involved and actively participating in services due to the introduction of “Sharing Life’s Journey” that was encouraged by Rev. Liefert. Each team member shares a bit of their personal story, experiences and consideration of the month’s theme for service and sermon. We are quite encouraged by the congregations’ appreciation and positive response to these stories.

Membership Changes in 2021-2022

New Members:

Kate Ames
Talia Carter
Terry Chriss
Stephanie Guidry
Dave Hudson
Kate Hudson
Heidi Iorio-Chriss
Laura Knipmeyer

Rejoined Members:

Debra Bright
Rachel Paluska

Deceased:

Klaus Altgelt (joined 1965)
Jack Austin (joined 1968)
Mary Jo Beery (joined 1995)
Lorayne Hansen (joined 1968)

Resigned:

Dianne Estrada

Number of Members as of June 1, 2022:

143

Number of Friends as of June 1, 2022:

150

**Unitarian Universalist Congregation of Marin
Proposed 2022-23 Budget**

	<u>Annual Budget</u> <u>2021/22</u>	<u>Projected</u>	<u>Proposed</u> <u>2022-23</u>
		<u>Year-End</u> <u>6/30/22</u>	
Revenue			
400 Contributions			
401 Basket	\$20,000	\$19,888	\$20,000
403 Basket Share	\$0	\$2,200	\$1,000
405 Unrestricted Contributions	\$15,000	\$12,279	\$12,000
407 Restricted Contributions	\$9,410	\$5,091	
Homeless Fund			\$5,000
Minister's Discretionary Fund			\$1,600
409 Year End Appeal	\$5,000	\$9,077	\$9,000
Total 400 Contributions	\$49,410	\$48,535	\$48,600
411 Pledges			
413 Current Pledges	\$235,000	\$280,000	
415 Prepaid Pledges	\$44,000		\$0
Total 411 Pledges	\$279,000	\$280,000	\$310,000
414 Prior Year Pledges		\$4,052	
417 Endowment Income			
418 RE Enhancement Fund Transfer	\$5,000	\$5,000	\$11,400
419 General Endowment-Quarterly Draw	\$13,000	\$13,406	\$13,000
420 Wesley Projects Fund Transfer	\$7,000	\$11,000	\$6,000
Total 417 Endowment Income	\$25,000	\$29,406	\$30,400
421 Fundraising	\$20,000	\$659	\$900
423 Miscellaneous/Unanticipated Income	\$23,000	\$663	\$600
425 Program Income	\$3,500	\$11,327	\$2,600
455 Rentals	\$60,000	\$76,000	\$110,000
Total Rentals	\$60,000	\$76,000	\$110,000
460 Grant Income			
462 Intern Minister Grant	\$12,500	\$12,468	\$0
Total 460 Grant Income	\$12,500	\$12,468	\$0
Semi Annual "Fund a Need"			\$20,000
Total Revenue	\$472,410	\$463,111	\$523,100
Expenditures			
500 Administration			
501 Bank Charges	\$100	\$200	\$50
501.1 Interest Paid EIDL Loan	\$4,000	\$4,600	\$0
503 Board Expense	\$1,000	\$597	\$600
MINISTERIAL SEARCH			\$15,000
505 Church Management Software	\$600	\$3,091	\$600
509 Consulting Services		\$318	\$600
511 Copier Lease & Maintenance	\$1,500	\$493	\$500
513 Credit Card Processing Fees	\$350	\$441	\$450
515 EFT Charges	\$3,800	\$3,695	\$3,700
517 On-line Services	\$1,000	\$222	\$1,000
519 Organizational Memberships	\$1,000	\$650	\$700
521 Postage-Office	\$500	\$131	\$150
523 Postage Meter	\$200	\$210	\$210
525 Security	\$3,000	\$3,758	\$3,112
527 Supplies-Office	\$3,000	\$2,957	\$3,000
529 Telephone/Fax	\$1,600	\$4,527	\$1,872
531 Unanticipated Expense	\$0	\$0	\$0
Total 500 Administration	\$21,650	\$25,890	\$31,544
600 Facility			
601 Audio Equipment Upgrade	\$0	\$1,918	\$1,000
603 Custodial Service	\$17,500	\$17,136	\$25,400
605 Repair & Maintenance	\$16,800	\$24,801	\$18,122
607 Fire & Liability Insurance	\$6,500	\$7,996	\$8,340
609 Landscape	\$17,500	\$17,149	\$14,400
611 Property Taxes	\$9,500	\$6,866	\$6,900
613 Facility Upgrades	\$1,000	\$8,638	\$0
615 Supplies-Janitorial	\$2,500	\$487	\$500
617 Trash Removal	\$4,000	\$3,271	\$3,600
619 Utilities-Electricity & Gas	\$5,000	\$8,361	\$8,500
621 Utilities-Water	\$3,000	\$1,637	\$2,640
Total 600 Facility	\$83,300	\$98,258	\$89,402

	<u>Annual Budget</u> <u>2021/22</u>	<u>Projected</u>	<u>Proposed</u> <u>2022-23</u>
		<u>Year-End</u> <u>6/30/22</u>	
700 Personnel			
701 Administrator 1 (BE)			
703 Dental & Vision Insurance	\$703	\$720	\$738
705 Long Term Disability	\$715	\$119	\$890
707 Professional Expenses	\$2,200	\$791	\$2,738
708 Health Insurance			
709 Retirement	\$5,500	\$5,292	\$6,845
711 Salary	\$55,000	\$52,917	\$68,445
Total 701 Administrator	\$64,118	\$59,838	\$79,655
701.1 Administrator 2 (Janette)			
703.1 Dental & Vision Insurance	\$59	\$197	\$0
705.1 Long Term Disability	\$96	\$122	\$0
707.1 Professional Expenses	\$0	\$121	\$0
709.1 Retirement	\$300	\$1,043	\$0
711.1 Salary	\$3,050	\$7,361	\$0
711.2 Accrued Vacation	\$7,573	\$1,780	\$0
Total 701.1 Administrator 2	\$11,078	\$10,624	\$0
713 Bookkeeper	\$12,000	\$25,144	\$16,632
715 Retirement	\$1,200	\$2,232	\$1,663
Total 713 Bookkeeper	\$13,200	\$27,376	\$18,295
717 Director of Family Ministries			
719 Dental & Vision Insurance	\$1,226	\$1,362	\$1,287
721 Long Term Disabilities	\$358	\$373	\$376
723 Professional Expenses	\$2,761	\$2,761	\$2,907
725 Retirement	\$2,761	\$1,922	\$2,907
727 Salary	\$27,606	\$28,756	\$29,070
Total 717 Director of Family Ministries	\$34,712	\$35,175	\$36,547
729 Facilities			
732 Technical Coordinator	\$0	\$9,153	\$0
Technical assistant	\$0	\$0	\$1,620
@ \$60/event)	\$0	\$0	\$3,480
Total 729 Facilities		\$9,153	\$5,100
735 Minister			
737 Dental & Vision Insurance	\$1,885	\$1,307	\$1,979
741 Health Insurance	\$8,400	\$6,444	\$3,600
743 Life Insurance	\$742	\$693	\$781
745 Professional Expenses	\$8,828	\$3,875	\$9,295
746 LTD Insurance	\$1,148	\$1,073	\$1,208
747 Retirement	\$8,828	\$8,828	\$9,295
749 Salary & Housing	\$88,275	\$88,275	\$92,954
751 SECA	\$6,753	\$6,374	\$7,111
Total 735 Minister	\$124,858	\$116,869	\$126,224
755 Ministry Field Ed Student Stipend	\$25,000	\$24,000	\$0
754 Ministry Field Ed-Professional Exp.		\$969	\$0
756 Ministerial Intern-Life/LTD	\$500	\$0	\$0
Total 755 Ministry Field Ed Student Stipend	\$25,500	\$24,969	\$0
757 Music			
759 Music Director-Salary	\$6,417	\$6,417	\$6,757
761 Pianist	\$6,681	\$6,566	\$7,500
Total 757 Music	\$13,098	\$12,983	\$14,257
763 Virtual Asst Admin/ Rental Coordinator		\$10,124	\$26,000
Retirement		\$2,600	
Total Rental Coordinator	\$0	\$10,124	\$28,600
765 Other Payroll Expense			
767 Employer Portion Payroll Taxes	\$13,912	\$12,255	\$15,000
769 Insurance-Workers Comp	\$3,200	\$2,033	\$3,360
771 Non Payroll Personnel Expense	\$2,500	\$2,375	\$2,500
773 Payroll Service	\$1,200	\$1,260	\$1,260
Total 765 Other Payroll Expense	\$20,812	\$17,923	\$22,120

	<u>Annual Budget</u> <u>2021/22</u>	<u>Projected</u>	<u>Proposed</u> <u>2022-23</u>
		<u>Year-End</u> <u>6/30/22</u>	
775 Family Ministry			
777 Summer Assistant		\$225	\$252
778 Early Childhood Coordinator	\$6,410	\$4,125	\$4,578
780 Elementary Childhood Coordinator	\$6,538	\$6,625	\$7,429
781 Youth Advisor	\$6,559	\$9,434	\$9,790
Total 775 Family Ministry	\$19,507	\$20,410	\$22,049
Total 700 Personnel	\$326,883	\$345,442	\$352,848
800 Program Expenses			
801 Communications			
803 Website Maintenance/Consulting	\$400	\$386	\$0
Total 801 Communications	\$400	\$386	\$0
805 Congregational Events			
807 Meetings & Activities	\$300	\$300	\$300
809 Retreat	\$1,000	\$0	\$500
Total 805 Congregational Events	\$1,300	\$300	\$800
815 Denominational Affairs			
817 Balazs Scholar	\$300	\$300	\$300
819 Denominational APF Contribution	\$14,823	\$14,823	\$16,305
821 Partner Church	\$620	\$620	\$620
825 UUSC	\$175	\$175	\$175
Total 815 Denominational Affairs	\$15,918	\$15,918	\$17,400
827 Fundraising Expenses	\$1,000	\$60	\$0
829 Hospitality Expenses	\$500	\$606	\$750
831 Membership Expenses	\$200	\$0	\$200
833 Music Expenses			
835 Piano Tuning	\$800	\$1,020	\$1,020
837 Supplies	\$300	\$0	\$300
Total 833 Music Expenses	\$1,100	\$1,020	\$1,320
839 Pastoral Care Expenses	\$100	\$100	\$100
841 Public Relations			
843 Marketing	\$2,000	\$0	\$150
Total 841 Public Relations	\$2,000	\$0	\$150
847 Family Ministry & Adult Spiritual Development			
849 Adult Education		\$500	\$500
851 Adult Ed Sermon Discussions	\$100	\$0	\$0
854 OWL Camp	\$3,000	\$2,145	\$0
861 Small Group Ministry-Soul Matters	\$400	\$400	\$435
863 Family Ministry Program Expenses	\$4,600	\$1,904	\$5,228
Total 847 Family Ministry & Adult Spiritual Development	\$8,100	\$4,949	\$6,163
867 Social Justice			
869 Basket Share	\$0	\$2,200	\$1,000
871 Social Justice Memberships	\$2,700	\$2,700	\$2,725
873 Social Justice Expenses	\$400	\$0	\$400
Social Justice Fund (Homeless Appeal)			\$4,000
Total 867 Social Justice	\$3,100	\$2,700	\$7,125
876 Stewardship	\$400	\$62	\$1,500
879 Worship Associates Expenses			
881 Speakers	\$2,500	\$1,220	\$5,005
883 Supplies	\$500	\$0	\$500
Total 879 Worship Associates Expenses	\$3,000	\$1,220	\$5,505
Total 800 Program Expenses	\$37,118	\$27,321	\$41,013
885 Rental Expenses	\$3,000	\$3,231	\$5,500
Total Expenditures	\$471,951	\$500,143	\$520,307
Quarterly "Fund a Need"			
Net Operating Revenue	\$459	(\$35,145)	\$2,793
Net Revenue	\$459	(\$35,145)	\$2,793

UU Marin Endowment Funds Committee

Mission:

Be the protector and promoter of UU Marin's three endowment funds, with promotion served by having a persistent presence in congregational matters relating to the long-term financial health of our congregation.

Purpose:

The Endowment Funds Committee actively monitors the investment performance of the three funds under its mandate – the General Endowment Fund, the Wesley Fund, and the Religious Education Fund. We advise the Finance Committee and the Board of Trustees on appropriate annual draws on the funds, and on occasion larger proposed withdrawals, consistent with the long-term goal to preserve principal and use investment proceeds consistent with each fund's charter. Although each fund has a different purpose, they share in common the objective of meeting current and future needs of the Congregation generally beyond typical operating expenses.

Committee Members

- Christopher Gilkerson (Chair)
- Margy Eller (Treasurer, UU Marin Board)
- Claudia Brown
- Ben Rowe
- Monique Webster

UU Marin Endowment Funds - Overview

General Endowment Fund

This fund was created to provide long term financial stability for UU Marin. The Congregation may consider withdrawal of funds in excess of the annual percentage draw in order to pay for major capital improvements on the Congregation's property. It is recognized that this may reduce the value of the fund, but it will preserve or increase the value of the Congregation's property. In addition, if the Board of Trustees determines that the financial health of the Congregation is threatened or the Congregation's persistent inability to meet financial obligations requires the use of a commercial loan, they may recommend to the Congregation the withdrawal of funds.

Religious Education Fund

The Religious Education Fund was set up to increase the monetary resources available for children's and high school age youths' religious education at UU Marin in order to create opportunities for the religious education (program and staffing) that would otherwise not have been possible. It is intended that decisions about the use of this fund will be made by those who are active in children's and high school age youths' religious education, and it is not designed to relieve the congregation of financial commitments for which they would ordinarily take responsibility. Distributions are included in the UU Marin's annual budget for Religious Education.

Wesley Fund

The Wesley Fund originated with a generous bequest by former UU Marin member, Art Wesley, whose memory we honor with the fund. This fund provides for special programs, activities, or capital expenditures as approved by the Board of Directors. Such programs, activities, or capital expenditures are defined as those which are new, unique, innovative and exploratory for UU Marin. Such programs should not expect continued support from the fund. The selection of a program, activity or capital expenditure to be supported by the fund shall be made by the Board of Directors. Annually, the Board shall solicit proposals from members, UU Marin committees or groups.

Financial Performance

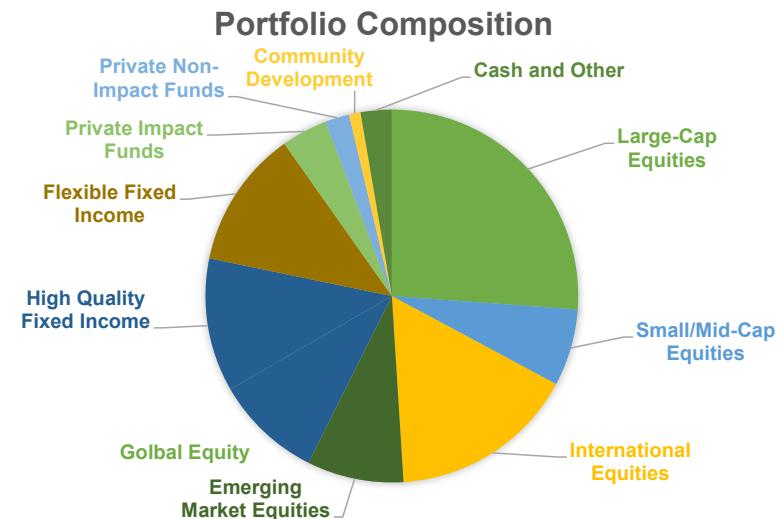
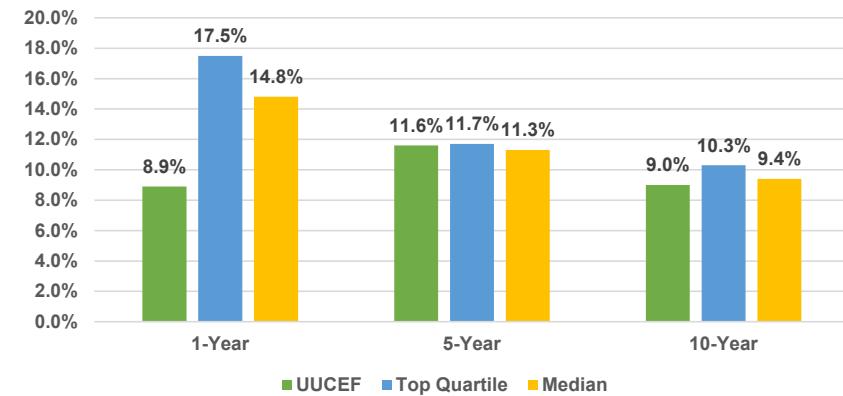
Investment Management

All 3 funds are invested with the UU Common Endowment Fund (“UUCEF” or the “Fund”), a diversified investment fund seeking current income and long-term investment returns through portfolio allocation and professional asset management with UU socially responsible investing goals.

Performance Highlights

- UUCEF underperformed over the twelve months ending December 31, 2021, ranking in the 90th percentile, due, in part, to greater exposure to international equities and fixed income relative to the peer group
- Longer-term results, which provide a more relevant gauge of performance, remain solid – over a 5-year period the Fund ranked in the 33rd percentile
- After 21 months of extraordinary gains, markets have been losing value in 2022 – the Fund lost 6.2% in the first quarter and recent declines may translate into a further drop in the Fund’s Q2 value if losses are not reversed
- We gratefully acknowledge two immediate gifts to the General Endowment Fund totaling \$55,376; these came at a crucial time just before the market downturn and will help enable larger future annual draws

UUCEF Gross Returns as of 12/31/2021
vs. InvMetrics All Endowments \$50mm to \$250mm



FYTD Balances & Disbursements

Summary of Activity (June 30, 2021 – March 31, 2022)

	UUCM General Endowment	Religious Education Fund	Wesley Fund
Beginning Balance - 6/30/21	\$348,878	\$141,004	\$154,433
Add: Contributions	55,376	0	0
Add: Investment Income	2,232	862	944
Add: Net Realized/Unrealized Gain/Loss	(20,799)	(7,436)	(8,138)
Less: Fees & Expenses	(2,582)	(998)	(1,093)
Less: Withdrawals	(10,055)	(4,107)	(4,609)
Ending Balance Balance - 3/31/22	\$373,050	\$129,325	\$141,538

Use of Funds in 2021-22

- **UUCM General Endowment:** \$10,055 was withdrawn from July 2021 through March 2022 to help cover general expenses, with another approximately \$3,500 expected through June 2022
- **Religious Education Fund:** \$4,107 was withdrawn from July 2021 through March 2022 to provide programs throughout the year, including books and art supplies, family events, and activities at the annual retreat, with another approximately \$1,400 expected through June 2022
- **Wesley Fund:** \$4,609 was withdrawn from July 2021 through March 2022 to help pay for the Intern Minister, with another approximately \$1,500 expected through June 2022

Committee Accomplishments this Past Year

- **Co-sponsored the Rose Legacy Circle**, working with the Legacy subcommittee of Stewardship to launch this important gifting effort with a new Letter of Intent form and inaugural Legacy Giving Sunday that took place on March 20
- **Recommended again a 4.5% annual draw** from each of the three funds, with warning that if inflation persists at current annual rate, it is very possible that next year's recommendation will be lower
- **Finalized a “Requirements and Requests” document** to govern the process for documenting requests to use the annual draws as well as any future extraordinary, larger requests that may occur from time-to-time to assure compliance with each endowment fund's charter
- **Began drafting an investment policy or charter**, which will identify factors to evaluate endowment fund investment performance and related factors on an annual basis

The Rose Legacy Circle

Long Term Stewardship at UU Marin

“The Rose Legacy Circle is named to embrace the potential of our congregation to blossom from the love, generosity and commitment of current members for future generations.”

We welcome and are grateful for lasting gift designations from wills, trusts and estate plans, charitable annuities, and retirement accounts. Confirm your intent now to join the Rose Legacy Circle. Contact our UU Marin Administrator for more information.

Planned Use of the Funds in 2022-23

- **The General Endowment Fund:** As every year, the 4.5% annual draw will help pay for the congregation's annual operating expenses.
- **The Wesley Fund:** The 4.5% annual draw will increase the role of the Youth Advisor to market and support children's and teen's religious exploration programs, as well as be responsible for timely communication with parents who are members or visitors. This will include keeping the Learning pages on our website interesting and updated, sending weekly emails through creative and colorful Mail Chimp correspondences, and pursuing other advertising avenues. The goal is to retain and grow our family membership.
- **The Religious Education Fund:** The 4.5% annual draw will pay for special programs including family events to invite friends, parent workshops, "Parent's Night Out," and OWL teacher training.
- **Potential Extraordinary Needs:** As requested, we may consider potential uses of the General and Wesley funds for significant one-time needs such as new minister housing support or capital expenditures, either of which would require a 2/3 congregational vote.

