

2019-2020 Annual Report



First Unitarian Church of Omaha

3114 Harney Street
Omaha, NE 68131
402-345-3039
www.firstuoumaha.org

In Memoriam

Olive Erickson
Lana Hammel
Clyde Kramer

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Board of Trustees

Joe Schaaf, President
Sharon Piehler, President-elect
Walt Jesteadt, Treasurer
Donna Tubach Davis (2020)
Catherine Plumlee (2020)
Sarah Copeland (2021)
Peg Pidgeon (2021)
Harold Cruz (2022)
Bill Tull (2022)

Elected Trustees of the Capital Trust

Daniel Byrd (May 2020)
Bob Hess (May 2021)
Christopher Schmidt (May 2022)

Nominating Committee

Convener: Maria Wallace
Kathi Oliver (May 2020), Carolyn McNamara (May 2021),
Nellie Chenoweth (May 2022), Mike McAtee (May 2022)

**Agenda The One Hundred Fifty-First Annual Meeting
First Unitarian Church of Omaha
May 3, 2020**

1. Call to Order Joseph Schaaf, President
2. Confirmation of Quorum Catherine Plumlee, Secretary
3. Zoom Meeting Housekeeping Catherine Plumlee
4. Appointment of Parliamentarian (G. David Richardson) Joseph Schaaf
5. Approval of Minutes of 150th Annual meeting (May 19, 2019)
6. Approval of Minutes of Mid-Year meeting (January 19th, 2020)
7. Presentation & Adoption of Proposed 2020-2021 Budget Walt Jesteadt, Treasurer
8. Presentation of Ministerial Candidate & Motion to Call Kim Dunovan, Chair of Search Committee
9. 15-Minute Break (Voting will take place at this time.)
10. Annual Reports Take questions from the floor regarding any and all annual reports as printed in the meeting book, including those of the Minister, President, Ministry Team Council, Director of Religious Education, Trustees of the Capital Trust Fund, and all team and committee reports.
11. Elections: Joseph Schaaf
 - President-Elect: Catherine Plumlee
 - Board of Trustees: Nellie Chenoweth (3 years) & Bruce Godfrey (3 years)
 - Trustee of the Capital Trust, Daniel Byrd (3 years)
 - Nominating Committee, Mary Kay Peters (1 year), Katrina Schmidt (3 years), Sara Switzer (3 years)
 - Right Relations Committee, Della Bynum (2 years), Deb McAtee (2 years)
12. Renewal of Right Relations Covenant (see next page) Joseph Schaaf
13. Recognition of Completion of Terms Joseph Schaaf & Sharon Piehler, President
14. Announcement of Call to Minister Vote Sharon Piehler
15. Adjourn Sharon Piehler

PROPOSED LEADERSHIP SLATE FOR THE 2020 ANNUAL MEETING

Board of Trustees:
Nellie Chenoweth (3 years)
Bruce Godfrey (3 years)

President Elect:
Catherine Plumlee

Right Relations:
Della Bynum (2 years)
Deb McAtee (2 years)

Nominating Committee:
Mary Kay Peters (1 year)
Katrina Schmidt (3 years)
Sara Switzer (3 years)

Capital Trust:
Daniel Byrd (3 years)

Slate Presented by the Nominating Committee:
Nellie Chenoweth, Mike McAtee, Carolyn McNamara, Kathi Oliver, Maria Wallace (convener)

Covenant of Right Relations

We, the congregation of First Unitarian Church of Omaha, covenant together:

To create a religious community where we can freely explore our values and foster diversity as a source of communal strength.

To build healthy relationships, seeking to understand each other and respect our differences.

To listen deeply and endeavor to communicate directly, honestly, and compassionately, particularly when we are in conflict.

To do our best to make amends when we have hurt each other, even unintentionally, to learn from our mistakes, to forgive, and to reconnect in a spirit of understanding and commitment.

Sunday, May 19, 2019

Annual Meeting Minutes

Minutes of the Sesquicentennial Annual Meeting of the First Unitarian Church of Omaha

Date	Location	
Sun May 19, 2019	First Unitarian Sanctuary	
Call to Order:	Convened by:	Quorum Present:
10:38 a.m.	President Maria Wallace	Yes

1. Confirmation of Quorum	
By:	Catherine Plumlee
Notes:	<ul style="list-style-type: none"> • Quorum (20% of eligible voters) is present. • 74 present members/200 eligible voting members=37%

2. Appointment of Parliamentarian	
By:	Maria Wallace
Notes:	<ul style="list-style-type: none"> • Dave Richardson was appointed as parliamentarian.

3. Approval of previous year's Annual Minutes						
By:	All in Attendance					
Notes:	<ul style="list-style-type: none"> • P. 8-10 					
Motion made by:	Teresa N'ha-Pagani					
To:	Approve 2017-2018's annual minutes with friendly amendments.					
Seconded by:	Sarah Copeland					
Discussion:	<ul style="list-style-type: none"> • P. 9, Name spellings, Marie Sedlacek, Nellie Chenoweth, Collin Hatcher • P. 9, misspellings & grammar, indomitable, assets, still be 					
Vote results:	For	Unanimous	Against	0	Motion	Carries

4. Agenda Item: Annual Reports	
By:	Maria Wallace
Notes:	<ul style="list-style-type: none"> • P. 11-37

(continued on next page)

5. Agenda Item: Treasurer's Report and Proposed Budget						
By:	Walt Jesteadt					
Notes:	<ul style="list-style-type: none"> • p. 44 & 45 					
Motion made by:	Ben Wallace					
To:	Approve the 2019-2020 budget					
Seconded by:	Linda Parker					
Discussion:	<ul style="list-style-type: none"> • There is a \$40,000 gap between pledges and next year's operating budget. The plan is to do another campaign in the fall. The budget was adjusted according to the pledge drive. • Standing ovation for Bill Ross for his volunteer contributions throughout the years. • There was much discussion about what it means to be a member of this church, what the church stands for, what it means to pledge, and what possible fundraising we can do in the future. • Kate Godfrey motioned to called the question. • Kate Wiig seconded. • This motion requires a 2/3 majority to pass. • For: Majority; Against: 2; Motion to Call the Question: Carries 					
Vote results:	For	Majority	Against	1	Motion	Carries

6. Agenda Item: Elections						
By:	Maria Wallace					
Notes:	<ul style="list-style-type: none"> • P. 6 • After asking 3 times, there were no new nominations from the floor. 					
Motion made by:	Ben Wallace					
To:	Approve the slate of candidates by acclamation.					
Seconded by:	Pat Will					
Discussion:	<ul style="list-style-type: none"> • none 					
Vote results:	For	Unanimous	Against	0	Motion	Carries

7. Agenda Item: Right Relations						
By:	Maria Wallace					
Notes:	<ul style="list-style-type: none"> • P. 7 					
Motion made by:	Kate Godfrey					
To:	Approve the Proposed Covenant of Right Relations as written in the Annual Report.					
Seconded by:	Nadine Keith					
Discussion:	<ul style="list-style-type: none"> • Note there was ample opportunity for feedback. • There was no further discussion of the covenant language. 					
Vote results:	For	Unanimous	Against	0	Motion	Carries

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8. Agenda Item: Ministerial Search Committee Election

By:	Maria Wallace
Notes:	<ul style="list-style-type: none">• P. 7• Voting by closed ballot.• Committee will be announced at next Sunday's service.

9. Agenda Item: Recognition of Completion of Terms

By:	Maria Wallace
Notes:	<ul style="list-style-type: none">• Recognizes Floyd Prine for fulfilling his 3-year term on the Board of Trustees.• Carol Ramsey for finishing her terms on the Board of Trustees and the Nominating Committee.• Tom Seguin for finishing his terms on the Board of Trustees and as Board Liaison to the Right Relations Committee.• Ben Wallace for fulfilling his 3-year term on the Nominating Committee.• Nadine Keith for fulfilling her 1-year term on the Right Relations Committee.• Jan Wilson for retiring from her position as the Director of Religious Education.• Floyd Prine recognizes Maria Wallace for fulfilling her presidential term.

10. Agenda Item: Nominations and Awards

By:	Members of the Nominating Committee
Notes:	<ul style="list-style-type: none">• Nobody said no! THANK YOU on behalf of the Nominating Committee.• Youth of the Year Award, presented by Ben Wallace to the politically active and artistic Lily McAvoy.• Young Adult of the Year Award, presented by Kate Godfrey to the ever young at heart, Tom Seguin.• Religious Education Award presented by Kate Godfrey to the likeable Jody Petrow.• Heritage Award presented by Marie Sedlacek to the deserving Dave Richardson.• Keeping the Faith Award presented by Marie Sedlacek to the monumental Barb Dewell and masterful Nancy Scott.• Social Justice Award presented by Kathi Oliver to the environmentally-friendly Mark Luscutoff.• Unsung Unitarian Universalist Award, presented by Kathi Oliver, to the pragmatic and calm Vanessa Timberlake. In addition, another award presented by Kathi Oliver went to the highly-skilled Bill Ross.• Unitarian of the Year Award was presented by Ben Wallace to the much-missed Denise Allain on Sunday May 10, 2019.

11. Agenda Item: Adjourn

By:	Joe Schaaf
Notes:	<ul style="list-style-type: none">• Thanks to the Rev. Michelle LaGrave, Cat Dixon and the rest of the office staff, the board, EMR, and Treasurer Walt Jesteadt.

Time Adjourned: 11:59 a.m.	Minutes Prepared by: Catherine Plumlee	Date Presented: Wed May 22, 2019
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**Minutes of the Mid-Year Congregational Meeting
First Unitarian Church of Omaha
January 19, 2020**

Present at meeting:

Joseph Schaaf, President
Sharon Piehler, President-Elect
Harold Cruz-Sanchez
Peg Pidgeon

Absent from meeting:

Donna Tubach-Davis
Catherine Plumlee, Secretary
Bill Tull

Song by the Sanctuary Singers.

Call to Order: The Mid-Year Congregational Meeting of First Unitarian Church of Omaha was called to order at 10:40am by Board President, Joseph Schaaf.

Lighting the Chalice

Update from the Board of Trustees - Joseph Schaaf, President

Mr. Schaaf thanked the lay leaders of the church who have helped guide the church throughout the year. He also thanked the board members each by name and particularly noted the work done by Walt Jesteadt over his many years as Treasurer.

Mr. Schaaf then stated that he wanted to update the Congregation on the work being done to pursue the advancement of our Annual Vision of Ministry. He pointed out that Rev. Michelle is our point person in achieving this vision and that she has done the work remarkably well. Mr. Schaaf then reviewed our Annual Vision of Ministry for the Congregation. He explained to the Congregation that updates from Rev. Michelle regarding this work can be found on our website under the Members section. Other items Mr. Schaaf touched on during his talk were that the board has done much work on the Employee hand book, that we have worked to make our policies and standards meet with the UUA guidelines for fair and equitable pay, and that we are working to be true to the 7 Principles. We are helping our new DRE Christina Strong with support in developing her DRE skills. The board is also currently working on a new Destructive Behavior policy and worked on the ministerial review for Rev. Michelle's first year with the help of last year's board members. The board worked with our Treasurer Walt Jesteadt and Cheri Cody from Second Unitarian to help us incorporate Power Church as our main platform, devised a 5-year plan for finances and have updated several existing policies.

Update from Ministry Team Council - Sharon Piehler, President-Elect

Ms. Piehler opened with explanation of what MTC is and what they do. Members of the team are, including herself, Rev. Michelle and two elected members Sarah Monaghan and Amy Lucas. Ms. Piehler then went on to point out other actions the team had undertaken during the past year:

- 1) Worked on the Annual Vision of Ministry
- 2) Adopted the use of a reporting tool to track progress and determine needs
- 3) Worked to secure systems, update passwords and become more efficient
- 4) Supported the Stewardship campaigns
- 5) Numerous building repairs
- 6) Helped to enact new policies, such as the smoking and vaping policy

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Work to do:

- 1) Streaming system old and in need of updating. Need cost quotes and the creation of user manuals for volunteers
- 2) Work of onboarding new settled minister

Ms. Piehler also asked that members of the Congregation step up to help with hospitality teams and support our Partner Church.

Update from Ministerial Search Committee - Kim Dunovan, Chair

Ms. Dunovan began by informing the Congregation that Search committee member Klyde Warren had resigned from the Search Committee and how much the Committee had appreciated the insight provided by Klyde to the search. She then reintroduced the Search Committee and had them stand. Ms. Dunovan explained the many steps it takes in the search for a settled minister. She thanked Rev. Michelle for her guidance and support during this process. Ms. Dunovan stated that members of the Congregation can find a detailed timeline and more information about the search process by going to the search committee webpage on the church's website.

Finance Report - Walt Jesteadt, Treasurer

A detailed financial report provided by Mr. Jesteadt was made available to the Congregation for review before the finance report. Mr. Jesteadt discussed how all of our financial processes are in transition. In May of last year Cheri Cody, treasurer of Second Unitarian was recruited to serve as our interim accountant with the goal of developing more transparent, streamlined financial procedures. He went on to say that we ran a deficit last year and are projecting one for this year. We generally come up short on pledge contributions but the good news is that this has happened in the past and we were able to return to annual surpluses.

Right Relations Committee - Deborah McAtee, Right Relations Member

Ms. McAtee noted that the covenant is now on the front cover of the order of service. She mentioned the other members on the Right Relations team are Carol Cronin, Della Gushen and Rev. Sarah Voss. She said that the team looks to respect our differences and work for our core values and principles.

Nominating Committee Solicitation for Awards and Leaders - Maria Wallace, Convener

Ms. Wallace introduced the members of the team, Nellie Chenoweth, Kathi Oliver - Chairperson, Mike McAtee and Marie Sedlacek. She pointed out the nomination form included in the handouts to the Congregation and asked that everyone consider who to nominate.

Benediction - Joseph Schaaf, President

Adjournment at 11:23am

Closing song sung by the Sanctuary Singers

Minutes prepared by Peg Pidgeon

Annual Reports

Minister, Ministry Team Council, President, Director of Religious Education,
and other Team and Committee Reports as Submitted

*(Reports are presented alphabetically by group name.
Unless otherwise noted, reports were submitted
by the Team Leader or Committee Chair.)*

Minister's Report to the Congregation — 2019-2020

Submitted by Rev. Michelle LaGrave, Interim Minister

The interim time, in the life of any congregation, can be busy, stressful, exciting, and transformative. This has certainly been true of this congregation in this interim time. Interim work requires extra dedication and commitment on the part of both staff and church members in order to engage with interim ministry with open hearts and minds and undertake the process of searching for the next minister. With the onset of the COVID-19 pandemic and the resultant closing of the church building and moving the church online, this extra dedication and commitment has become something truly extraordinary. This church *has* successfully moved online and done it quickly and under stressful circumstances. I am impressed by and proud of all the staff and volunteers who have put forth an intense effort to make this happen. I cannot say thank you enough.

Rather than reiterate all that you can read in the individual reports of the various teams and committees of the church, I would like to highlight a few areas of congregational life that have been in particular need of ministerial attention this past year.

The move online happened on March 12, a Thursday, with the decision that day to close the church building immediately. By Saturday, Zoom practice sessions were held and by Sunday, March 15, the first online service was held. Guest speakers had to be cancelled and new services created with more appropriate topics and themes. Volunteers were assembled to coach people on Zoom use, the Ministry Team Council held extra meetings to plan everything out, and caring volunteers were recruited to provide extra support to the existing Caring Team. Most church meetings and programs have continued online and some new ones added such as the Wednesday evening Chat with the Minister and the weekly RE Parent Chats. Massive efforts have been made to build and maintain connections with each other and to reach out to people who had not been seen on Zoom or otherwise heard from in recent weeks. Staff took on extra responsibilities outside their normal duties and covered for other staff who were out sick.

In conjunction with the Board, working on a brand new Personnel Policy Manual and a majorly revised Destructive Behavior Policy have been big projects. The Destructive Behavior Policy in particular has been written with a strongly anti-oppressive lens in an ongoing effort to dismantle any inherent or hidden culture of white supremacy.

Just before the annual meeting last year, a new focus was added to the DRE position which became a Lifespan Director of Religious Education position and Christina Strong was hired. Over the course of this past year, I supported Christina in her initial startup, planning, and program development, as well as her application to enter a DRE accreditation program. Christina and I also co-taught an Adult RE curriculum, called Cakes for the Queen of Heaven, this past fall.

Other areas requiring a high level of attention have included transitioning the church to a paid consultant who now handles most of the church's bookkeeping, updating Employee Agreements, and supporting both the newly-formalized Sister Church Team and Ministerial Search Committee, as well as beginning the process of saying goodbye as your minister. You are a wonderful people, a good church, and you will be missed.

Lastly, I would like to acknowledge the death of long-time church member, Lana Hammel. She too will be missed and remembered fondly.

In love and with faith,

Rev. Michelle

Ministry Team Council

Members: Sharon Pehler, Sarah Monaghan, Amy Lucas, and Rev. Michelle LaGrave

A brief review for newcomers:

What is the MTC? What do we do?

Our Ministry Team is the action arm of the church. that the church offers to

It includes all of the individual teams that operate the church (e.g. the Fellowship Team, the Worship Team, the Office Team, etc.). It also includes all of our individual staff members (both volunteers and employees).

The goal of our Ministry Team structure is to be flexible and to empower the individuals who best understand the work that needs to be done. Each team must understand and support the overall goals of the church that are documented in the Board of Trustees' Policies, Annual Vision of Ministry, and other sources.

The entity that the Board of Trustees has entrusted with supporting, coordinating, and directing the work of the Ministry Team is the Ministry Team Council.

The MTC does not set policy, we put board policies into effect.

Ministry Team Council Members

The MTC consists of four members as follows: The President-Elect of the Board of Trustees, ex-officio, The Minister of the Church, ex-officio. The Minister's term shall be continuous. Elected MTC Members. Two members of the MTC shall be elected for two year terms. Members: Sharon Pehler, Sarah Monahan, Amy Lucas

What we did this past year

Worked on our Annual Vision of Ministry with our teams to ensure our work supports our goals.

The teams group adopted the use of a simple 4 box reporting tool to easily track progress and determine needs. Tech work was done with more to come. Work was done to secure systems, update passwords and make the system more efficient.

We supported the stewardship campaigns.

Numerous building repairs included installation of security doorbells, fixture repairs, painting, etc.

Thanks: Joe Schaaf, Dave Rosser, Bill Ross, Bob Perrin, Jerre Tritsch, Mike McAtee and anyone else who helped.

We enacted board policies including the new smoking/vaping policy.

With the onset of COVID-19 we instituted a response team First UU Cares. With one email asking for volunteers we quickly assembled a list of almost 40 individuals willing to step up and help with grocery delivery, prescription pick-up, phone check ins and technical help with using ZOOM. As of April 9th we had made contact with close to 50 members and friends.

The MTC team created a schedule for checking the building and retrieving mail to make sure all was well.

In the process we all learned many lessons about what truly matters.

Work to do

Our streaming system uses old software. We are in the process of obtaining quotes on a newer more efficient system. This will include creation of user manuals for volunteers. We had made progress that halted with the COVID-19 pandemic and hope to resume work as soon as possible.

We need to evaluate our Partner Church program going forward. We are lacking participation and funding to maintain and grow the relationship in a meaningful manner. In reaching to Rev. Roger Bertschausen, Executive Director of the UU Partner Church Council for input, he strongly recommended that we look for ways to restart the relationship or be very transparent in dissolving it. We would greatly appreciate the congregation's input and offers of assistance as we move forward.

Major focus and work ahead will include the transition of ministers and onboarding our settled minister in a seamless manner.

Please share your ideas, concerns and question with members of the MTC at any time. And, as always, a sincere thank you to Rev. Michelle for her thoughtful guidance and to Cat Dixon for her incredible know how.

Respectfully,

Sharon G. Pehler, President Elect

Board of Trustees Report 2019-2020

Submitted by Joseph Schaaf

Well everyone, it has been a whirlwind year as your board president, and I wanted to give you a quick summary of three critical things your Board & MTC (Ministry Team Council) have accomplished this year:

First, based on my conversations with the Search Committee (in consultation with the UUA) and other church leadership we're on track to navigate a successful search for our new Minister (despite the difficulty and challenges of completing this search under our "new normal") How exciting is that?

Next, we've been working on finding Walt Jesteadt a relief replacement for the position of church treasurer, a position he has held for many years. Unfortunately, given the current pandemic crisis combined with our ministerial transition, we're not able to make that transition just yet. We believe we have a succession plan in progress, so we are optimistically hopeful that we can allow Walt to step away from this role soon. To thank Walt for his ongoing service is absolutely insufficient, but I would like to offer my most sincere "Thank You" for everything Walt has done for the church. Our hope is that we are able to create a sustainable path for this position going forward, so others aren't called upon to stay on as long as Walt has, and we will continue to work towards that end.

Finally, we have been very busy with preparing our congregation for the transition from Interim Ministry to a new Settled Minister, and a big part of that has been the stewardship component. Unfortunately, this year's drive has been thrown a (huge!) monkey wrench. We're working to make adjustments. We have implemented a 5-year Vision Plan for our finances, that will now need to be tailored (significantly?) given the new world we live in, but given our healthy financial reserves, I believe we're on an overall strong financial footing and in good financial hands.

There have been several other important accomplishments over the last year, but suffice it to say we have been very busy and I believe very productive in trying to be faithful stewards of your church. It has sincerely been a pleasure and an honor to serve as your board president over the last year, but I would be remiss if I didn't thank some very important people on my way out.

First, I need to thank Sharon & Pete Piehler, Mike & Deb McAtee, Mary Kay Peters, and the other members of the Stewardship Team who came together to help us "Mind the Gap" and embrace our financial stewardship with "gratitude."

Lori, my wife, has consistently stepped up to be a most generous hostess for several stewardship and board events, so it goes without saying that I'm very thankful for her support, assistance, and leadership with her culinary skills and in allowing me to spend so much time away from home over the last couple of years working for our congregation (our extended family).

It is with all sincerity that I tell you that the rest of the Board and the MTC has been hard-working and diligent in guiding our church, so I am very grateful to all of you for your hard work as well. It is important for me to recognize and extend a general "Thank You" for all of the other volunteers and employees of our community who help make us who we are and allow us to do what we do—you are all the best and I'm forever thankful for everything that YOU do!

Cat Dixon is a treasure for our church that I hope we always appreciate and assist when she needs our help. Seriously, we couldn't do half the things we do and our church would come to a standstill without her critical patience and guidance in the everyday affairs of our community. We love you, Cat, and I, for one, will always be at your service.

Finally, Rev. Michelle and Micah have been such an amazing gift for our congregation. She has shepherded us through a difficult time with grace and aplomb. I wish them both the best in all of their future endeavors and would like to graciously extend an open invitation for them to come back to Omaha and visit us down the road. (There is a UUA mandated blackout time where they won't be able to contact us in order to give our new minister time to settle in and adjust free of any outside interference.) Rev. Michelle and Micah: I say with certitude that this congregation loves you both and embraces you as part of our shared history! We hope our paths will all cross again someday down the road!

So with that, I'm signing off and wishing you all the very best going forward, Joseph Schaaf

Religious Education Report

Submitted by Christina Strong, Lifespan Director of Religious Education

Throughout my first eleven months as LDRE, I've enjoyed beginning the journey of getting to know the First Unitarian community, and I hope the community feels they have begun to know me. I've also enjoyed the opportunity to become more involved with Unitarian Universalism at the national level, and am happy to have been introduced to resources available to (and from) RE professionals that I can bring to our community. When I began this work, I said to more than a few people, "At least the first three years will just be a lot of experimenting," having no idea how true this would be by April 2020! Here are the ways we grew together in RE this year, and my goals for the next year.

Multigenerational Worship and RE Activities

Participants of all ages contributed to three multigenerational worship services this year, playing parts in skits, participating in the holiday gift processional, and sharing with the congregation about the intergenerational friendships they have formed within our church community. Twenty-one adults and twenty-one children and youth participated in "Mystery Friends," an intergenerational pen pal program that included writing letters to each other over four weeks and meeting up for breakfast on a Sunday morning before attending church (together when possible). Other RE sponsored community-building activities included a bonfire at Bellevue Berry Farm in October, and monthly CommUUnity nights for sharing a potluck, socializing, and playing games. For the coming year, I am looking into a Popcorn Theology curriculum (movie segments + philosophical/theological discussions + activities) created for use with multigenerational groups and families.

Nursery/Kindergarten

We introduced the Chalice Children curriculum in the Nursery with varying levels of success, depending on the age/attention-span of children in attendance. We established that the baseline goal for each Sunday is to do a circle time with a chalice lighting and chalice lighting words, followed by a brief lesson, if possible. We learned through trial and error that it works best to keep the Kindergarten students in the Nursery class, and to involve them in UU education and rituals there to prepare them to enter the Elementary class. The Nursery children did the chalice lighting for one multigenerational service, and I'm looking forward to finding ways to include them more in all-church events. Three kindergarteners participated in the Mystery Friends program. One of my goals this year for the Nursery staff (especially Nursery Coordinator) was to help them see their roles as educators of our youngest UUs, in addition to being child care providers. I tried to familiarize them with Unitarian Universalism (most knew very little about it), and had several meetings with Andrea and a Nursery staff retreat/meeting to get to know them better and talk about my goals for the Nursery Sunday morning class. I look forward to continuing these activities over the next year. Andrea is graduating from college and will be resigning from her position as Nursery Coordinator on June 20th, so we are currently seeking applicants for that position.

Elementary Class

The 1st-5th grade class has been using the Soul Matters RE curriculum this year. This was selected with the goal of creating opportunities for intergenerational conversation, since classes are about the same monthly themes adults are reflecting on in worship and small groups. It doesn't appear that those types of conversations have flowed automatically from focusing on the same themes in our separate spaces, so I am looking forward to creating more explicit opportunities for adult/child interaction around the themes in the coming year if we continue to use the Soul Matters RE packets. In addition to the monthly themes, Soul Matters packets strive to include UU history and identity, world religions, and holidays that are relevant to the current month. If we continue to use Soul Matters as our RE curriculum, my goal is to add additional resources to strengthen the areas of UU identity and social justice. I am also considering trying out a different curriculum beginning in the fall of 2020, and will finalize this decision over the summer.

(continued on next page)

Middle/High School Class

Middle and high school students started off the church year strong by coming together on Sunday mornings to prepare a video promoting First U to potential ministerial candidates and to our own members as a tool for the pledge drive. They interviewed adults in the congregation about what aspects of First Unitarian keep them coming back every Sunday. This was a great way to introduce these students to all of the various groups and activities that adults participate in at First U. This also may have sparked their interest in getting better acquainted with adults at church. We had more middle and high school students participate in the Mystery Friends program than children of all other grade levels! In October, the movie production group began alternating Sunday mornings with the movie viewing group, using the Popcorn Theology Curriculum. Popcorn Theology includes a 15-30 minute segment of a movie, followed by related discussion questions and activities exploring a variety of theological questions or social justice issues. For the upcoming curriculum year, I'm hoping to have the Sunday morning MS/HS class utilize the Neighboring Faiths curriculum, including bringing in speakers from, and having class visits to, religious institutions of various faith traditions in the Omaha community. YRUU on Wednesday nights remains the most consistently well-attended middle/high school church activity, and is well-supported by seven adult volunteers. More about this year's YRUU program is included in a separate annual report written by the Lead Youth Advisor.

Adult RE

The LDRE and Minister offered five sessions of the Cakes for the Queen of Heaven curriculum for adult women in the fall of 2019, and fourteen women from First U and two women from Second U enrolled in the class. Sunday morning forums were discontinued due to lack of attendance. The Women's Religious Studies class, book clubs, Soul Matters small groups, and the Compassionate Communication class continue to meet regularly at the church. As a new Lifespan DRE, I am still trying to figure out how to best support and supplement the existing adult programming at the church (which seems to have been running smoothly and strongly) with volunteer leadership of each group, since my arrival. If these groups are not already thinking of themselves as Adult RE, that is something we can strengthen in the coming year, and ensure that all church participants and newcomers are aware of all the adult RE opportunities available to them via these various groups. It is my intent to continue to facilitate 1-2 short term (weekly or monthly for a limited duration) adult RE classes per year on special topics.

Our Whole Lives (OWL)

OWL for K-1st grade and 4th-5th grade was offered in partnership with Second Unitarian in the fall of 2019. Four First U families and one adult OWL facilitator participated. OWL for 7th-9th graders was offered at First Unitarian from October 2019 through March 2020. Six First U students and one Second U student participated, and the class was facilitated by the LDRE and one volunteer from First U. In February 2020, two volunteers from First U received training to become middle/high school OWL facilitators, and the DREs from First and Second Churches received training to be able to facilitate young adult, adult, and older adult levels of OWL. We are planning to offer high school OWL in the fall of 2020 (but may choose to wait until spring 2021, depending upon when the updated HS OWL curriculum is released!), and to offer adult OWL (with some separate, additional, sessions for younger/older adults) in 2021, both in partnership with Second Unitarian.

Adapting to Online RE during the COVID-19 Pandemic

Adaptations to our programming during the COVID-19 pandemic have included: moving our RE classes online via Zoom; switching from lesson-based online classes to "check-in & chat" as parents indicate their children's biggest need during this time to be social interaction with peers; sending elementary RE lessons home via email for parents who wish to continue UU education at home; continuing YRUU online; offering a new weekday online group for 3rd-5th graders; offering a weekly parent chat; and subscribing to Soulful Home, a monthly packet for families filled with ideas and resources for UU theme-based exploration at home and throughout their regular daily routines.

(continued on next page)

First U Supports RE!

I am grateful to the RE Team for their creativity and flexibility, to the RE Teachers and Nursery Coordinator for their patience and commitment, to Rev. Michelle for her leadership and her knack for giving me the right balance of supervision and autonomy, and to Cat Dixon for her organizational skills and dependability. I'm grateful to the First U community for their willingness and eagerness to participate in RE programs and to step up when help is needed. More than once this has brought tears to my eyes. I'm grateful to YRUU advisors and participants for being all-around amazing, for their commitment to their community within our community, the way they care for and connect with one another. I'm grateful to all the children and youth for showing up and learning and playing and creating with us, and for being willing to participate in all-church and multigenerational events. I appreciate the church's support of my professional goals, my enrollment in the RE Credentialing Program, and my participation in national RE events and educational opportunities.

Twenty Years Ago — 1999-2000

Submitted by Dave Richardson

The 1999-2000 church year was the second year of Reverend Richard Benner's tenure with First Unitarian Church. In his report he noted growth in the areas of membership and community outreach. Rev. Benner had recently joined four different ministerial and ecumenical groups including Omaha Together One Community (OTOC), which our congregation joined that year.

A number of other innovations began that year. Board President Roger Arney presided over the transition from the "Program Council" system to the "Board Liaison" approach to church committees, programs and teams. The Membership Committee was re-formed under the capable hands of Jaime Alexander which resulted in an increase in new and returning members. The YRUU youth group took a trip to Boston which was enjoyed by all.

First Unitarian had an exciting year as they entered the new Millennium.

Archives/Library Team

Leader: Linda Parker

Members: Sarah Copeland, Barbara Henney, Linda Hess, Dave Richardson, Maria Shellman

Activities — 2019/2020:

This year's work focused on organizing the library collection. Team members have been shelf reading (putting the books in correct call number order). We identified books to discard, such as moldy books, titles in extremely poor condition, and books that did not fit our collection guidelines. Numerous books were cataloged. We also dusted the books and shelves! This process will continue in the coming year in order to make room for newer, relevant books representing the many spiritual paths of church members.

The Library Lady wrote articles for *The Flame* and mourns the demise of this monthly church newsletter.

A Kindle was purchased to test the interest in e-books. The interest has been minimal, and future purchases of e-books will be by request only.

Illness and the closure of the church building during the corona pandemic slowed our progress this year. When the team completes its review of the book collection, we will begin work organizing the church archives. The talents of our newest member, Maria Shellman, an archivist at UNO, will be greatly appreciated!

Atheists, Humanists, Agnostics Discussion Group (AHA)

Leader: Sheri Conner

Members: 44 people are on our email list. Meeting attendance runs from the low end of about twelve to the high end of about 30.

Activities — 2019/2020:

AHA took the 2019 summer off; however, the steering team continued to meet for planning purposes. The group reconvened in the fall, meeting every other month starting in September. We did not finish out the year because the church was closed due to the COVID-19 pandemic.

AHA presented the service on August 4. The sermon, titled “Good without God” was delivered by Jody Petrow, Larry Goesser and Dave Richardson. The year opened in September with a discussion about toxic masculinity and in November the group met with the Ministerial Search Committee. For the January meeting, Rev. Ron Knapp, along with other readers, explored the theme “The Perpetual Journey” with the group.

In December, AHA held a book launching party and coffee house that introduced Rev. Ron Knapp’s new book titled “Oneness: Thoughts On A Humanistic Theology of Everything.” AHA had a plan to do a presentation on the “Gadfly Papers” for the March program, but the church closed before our scheduled meeting. Whether or not we will be able to do the program in the future remains, at this point, unknown.

It is also unclear as to whether or not AHA will continue in the fall. Sheri Conner will be stepping down and we don’t have a replacement leader at this time.

Book Club

Chair: Dave Richardson

Members: Varies widely

Activities — 2019/2020:

The First Unitarian Book Club continues to read and discuss a wide range of books. We meet on the last Monday of the month at 7pm in the Merritt Lounge. Our discussions are informal and we encourage participation by everyone. Our motto continues to be “You Don’t Have to Have Read the Book to Attend.”

Here is our list of books. We do not meet in December, June or July.

2019:

- May *The Kings of Broken Things* by Theodore Wheeler
- August Discussion of everyone's summer reading
- September *24th and Glory* by Dirk Chatelain
- October *Becoming More Fully Human* by William R. Murray
- November *Catch and Kill* by Ronan Farrow

2020:

- January *Educated* by Tara Westover
- February *An Indigenous Peoples’ History of the United States* by Roxanne Dunbar-Ortiz
- March *Secondhand Time* by Svetlana Alexievich
- April/May *The Tricking of Freya* by Christina Sunley

Capital Trust Fund — April 14, 2020

Submitted by Daniel Byrd

Members (Term expiration date in parenthesis): Daniel Byrd, Default Chairman (2020); Bob Hess (2021); Christopher Schmidt (2022)

The Capital Trust was established in 1981 to provide management of the church's long-term capital investments and keep them independent of the daily operations of the church. Amendments to the Capital Trust Agreement, were debated and approved by the Board and the congregation at the 2018 annual meeting.

Henceforth, investment income, and possibly capital, will be distributed as directed by the board to the church for operating expenses, subject to a 4% limitation. Preservation and growth of the principal is the primary directive of the Trust. The Trust also handles the investments of two small restricted use donations: Music and Women's Alliance (WA). It also handles a Board Investment Fund (BIF) created by the Board during the 2018-2019 church year using \$500,000 from recent large bequests.

The primary non-financial objective of the Capital Trust trustees, over the course of the year, was to consolidate all the Capital Trust monies from Vanguard and T. Rowe Price into Fidelity. The consolidating process was long and convoluted. All individual fund investments were liquidated at the respective brokerage houses and cash transferred to Fidelity. Reinvestment began with a dollar-cost-averaging into a Standard & Poor Index fund (SPY).

In addition, \$500,000 from the TD Ameritrade account holding the BIF was moved to Fidelity on December 6, 2019. The remaining \$41,107 in the BIF account was treated as investment income for the 2019-2020 church year, eliminating the need to take income from the Capital Trust.

Valuations:

	<u>Capital Trust</u>	<u>BIF</u>	<u>Music</u>	<u>WA</u>
April 30, 2019	\$579,755	560,371	7,544	12,578
Dec. 31, 2019	\$595,291	501,253	7,694	12,800
April 14, 2020	*\$561,010	*478,553	7,676	12,946

*The March 2020 market crash reduced the value of both the Capital Trust and BIF despite the fact that 56.3% (\$315,671) and 63.1% (\$302,067) respectively, of the money was in a money-market fund.

Going forward the Trustees' plan is to invest the existing BIF cash in a GNMA fund to further insulate capital. Trust funds will be dollar-cost-averaged into Fidelity's Puritan Balanced fund. Likewise, the Music and WA monies will be invested in separate balanced funds to simplify and separate record-keeping.

Caring Team

Leader: Louise Jeffrey

Co-Leaders (Memorial Services): Deborah Duggan, Kay Lynn Goldner,

Co-Leaders (Baby Welcoming): Katrina Schmidt, Sara Switzer

Leader (Cards for those who cannot make it to church): Terri Lynn Brewer

Members: Suzanne Arney, Kim Callaghan, Kim Dunovan, Linda Hruska, Nadine Keith, Douglas Lee-Regier, Carol Ramsey, Marie Sedlacek, Lisa Starbuck, Vanessa Timberlake, Elaine Wells, Pat Will

The Caring Team remains one that is mainly responsive in nature. We endeavor to support the needs of our own congregation members, by word of mouth, self-referral, and by referral from the minister or the church administrator. Among the services provided are care to members who are ill (such as meals and rides to medical appointments) to those recovering from illness, receptions after memorial services, baby welcoming gatherings and meal trains for new parents, and holiday cards and occasional visits to members of the congregation who are in care or homebound as the result of disability or long term illness.

Post memorial service coffees were held on October 16, 2019 in memory of Olive Erickson and on January 30, 2020 in memory of Clyde Kramer. Lana Hamel passed away in March, 2020, and as a result of the social isolation associated with the COVID-19 crisis, no memorial service plans are currently in place.

Welcoming parties were held for the babies of Jessica and Taylor Eman (June, 2019), Caitlyn and Tom Seguin (October, 2019), and Sarah and Tim Copeland (March 2020). Meal trains were organized for these families.

In addition, in conjunction with the Ministry Team Council, during the recent COVID-19 virus epidemic, we have attempted to take an affirmative role in maintaining contact with all church members through calls and by attempting to help our members become acquainted with Zoom. During this time of economic dislocation associated with the current crisis, the Caring Team is also allocating up to \$1,000 from our balance of \$2,300 for grocery gift cards for members of the congregation to be distributed confidentially and at the discretion of the minister.

Chalice Guild

Leader: Kay Lynn Goldner

Members: Kim and Brian Callaghan, Carolyn McNamara, Donna Neff, Roman Noriega, Lois Norris, Marie Sedlacek, Nadine Keith

Activities — 2019/2020:

Kitchen and table linens were laundered as used.

The chancel candles were replaced approximately every three months and the brass candles tops cleaned. Because of the expense of the candles (\$3.75+ each), the Guild has begun the practice of removing the brass tops as the candles burn down to extend the usage. With only one regular weekly service, the “candle life” is extended.

The talented new team who had designed and made holiday decorations last year, used them again this December to decorate the sanctuary. Lois Norris, Nadine Keith, Marie Sedlacek also helped with “decking” and “undecking” the halls.

The pews and pew racks were wiped down and cushions were vacuumed. Occasional dusting in the foyer, sanctuary was done.

When the church closed due to COVID-19, Kim Callaghan and Kay Lynn Goldner wiped down all the pews, door handles, knobs, tables, and other surfaces with disinfectant wipes. All the toys in the nursery were run through the dishwasher and surfaces were disinfected.

The Guild is grateful to all church members who use the kitchen and are helping keep it neat. As always, the Chalice Guild team steps up when asked to do this work for the church. Thanks to them!

Choir: Sanctuary Singers

Director: William Miller

Accompanist: J Gawf

Librarians: Kay Lynn Goldner and Christina Noriega

Sanctuary Singers: Kathy Alexander, Skip Ciulla, Drew Dillon, Jen Dillon, Cassandra Fish, Bruce Godfrey, Kay Lynn Goldner, Barb Herring, Margaret Johnson, Grant Langdon, Amy Lucas, Frank McKee, Christina Noriega, Dave Olson, Clacy Olson, Alec Peck, Spencer Pereira, Peg Pidgeon, Catherine Plumlee, Carol Ramsey, Gary Randall, Evy Rosser, Katrina Schmidt, Marie Sedlacek, William Tull, Klyde Warren, Elaine Wells

Activities — 2019/2020:

The first Sanctuary Singers rehearsal was held on September 4, 2019 and rehearsals continue to be held each Wednesday from 7:00 to approximately 8:30 p.m. The Sanctuary Singers continue to sing on the first and third Sundays of the month, September through May, as well as at the Christmas Eve service.

We were fortunate to retain the talents of J Gawf as our choral accompanist. J has proven to be an excellent partner for, not only myself, but also for the Sanctuary Singers.

Approximately 30 members of the Sanctuary Singers and their guests attended a holiday party at the home of William and Gary in December. It was a great way to socialize outside of the church and get to know each other better.

Starting in the fall, the group traversed over a varied musical terrain with multiple theologies and beliefs. From the poetry of Langston Hughes' *I Dream a World*, to the nature inspired *Oceans and Stars* by Amy Beron, the choir has embraced the challenges of different types of music. The Tenors and Basses of the group offered a lively performance of *Do You Know the Way to Bethlehem?* during the Christmas Eve service, while the Sopranos and Mezzos provided a stunning arrangement of *The First Noel* by Dan Forrest. Early in 2020, we learned Hebrew pronunciation for *Sim Shalom* (Lopes) and brushed up our Latin for Victor C Johnson's *Non, Nobis Domine* and *Ubi Caritas*. We revisited the poetry of Sara Teasdale through the stirring composition *That I Loved* by Mark Burrows. On June 7th the group will perform its annual concert in the Sanctuary.

Kay Lynn Goldner and Christina Noriega provide outstanding support making sure music is distributed, picked up, filed, repaired, etc.



Covenant of Unitarian Universalist Pagans (CUUPS)

Leaders: Stephanie Lewis, President; Machaela Player, Secretary

Members: Christine Cahill, Nellie Chenoweth, Pamela Colbert, Telia Colbert, Bethany Cook, Ryan Cook, Mary Kay Douglas-Peters, Kate Godfrey, Della Gushen, Bob Hess, Chynna Jedlicka, Suzanne King, Lita Magisana, Lucas Magisana, Sebastien Magisana, Rueline Nightingale, Clacy Olson, Rosharra Owens, Sara Switzer, Stephen Switzer, Mark Tipton, Klyde Warren, along with many visitors and friends of the group who infrequently attend, but are always welcome!

Activities — 2019/2020:

As a spiritual group, Mystic Sojourn CUUPS continues the work of providing earth-centered worship for members of First Unitarian, as well as friends and visitors. Throughout the last year, our rituals and events ranged from 8 to 35 attendees, many of whom were visitors to our church for the first time. Through our rituals and events, we celebrate the eight common yearly Sabbats. In the last year, we enjoyed guided meditations, a divination night, and many other traditional and nontraditional rituals led by many different members of our group. Mystic Sojourn CUUPS also engages with all members of First Unitarian by leading Sunday services at various opportunities throughout the year. Our 2019 Yule service included both a new take on and a re-enactment of a well-known Pagan character, the Holly King, which helped share our overall message of the silver linings that can be found in the cold and dark of winter. Information about our open worship is available in First Unitarian's e-news, as well as regular church announcements. Our goal is to be inclusive of the diverse beliefs that fall under the broad term, "Pagan," along with increasing our sense of group community.

Early Morning Risers

Leadership: Stan Harper (Director), Mary Kay Douglas-Peters (lay leadership), E.Lloyd Olson (lay leadership), Sarah Copeland (lay leadership assistance)

Pianist/Featured Musician: Stan Harper

Members: Bethany Cook (voice, percussion) ; Bruce Godfrey (trumpet, percussion, voice); Carol Cronin (voice); Charlie McMahon (sound); David Rosser (voice, sound); E Lloyd Olson (ukulele, percussion, bass, voice, tech, arranging); Kate Wiig (voice); Maria Wallace (voice, bass); Mary Kay Douglas-Peters (voice, Percussion); Mary Thomas (voice); Dave Olson (guitar, voice); Sarah Copeland (voice); Alec Wilson Peck (voice, trombone, irish pipes); Lexi Anderson (voice, percussion); Margaret Johnston (voice, percussion, ukulele); Rych Anderson (guitar, voice, percussion)

EMR has undergone some changes in the past year 2019/2020. Mostly changes in regular participating members, Bethany Cook, E Lloyd Olson, Alec Wilson Peck, Bruce Godfrey and Margaret Johnston have been the most consistent participating members. There's been a shift in participation but continued efforts to bring back less active members have proven effective.

This is a strength of EMR and its music outreach. EMR provides a place for music making, even if you are unable to attend regularly. While we encourage consistent participation, we love opening our group to new members or one-time contributors.

Rehearsals are conducted every Saturday from 10:30 am to 12.30 am in the sanctuary, unless posted otherwise. Song selections are collected, discussed and decided in Facebook events within the EMR Facebook Group and then reported to the church office for publishing. We have collected songs performed from the last few years and organized them alphabetically in folders for easier access.

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Lloyd Olson has spent hours and done a masterful job of cleaning and re-organizing the Reeb Room. Enabling members to find music much easier, or practice drumset/other instruments in there if needed/wanted. He has also helped with our Facebook communication, tech issues, and posting events etc.

We have implemented a secondary source for special music sign-ups in an attempt to engage members that don't participate weekly to find a space in which they can claim a specific date for performances. The idea has been both successful and challenging.

Events to highlight from the year are the EMR fall music service which was well received by the congregation, participation in the Christmas eve services, and long time EMR member Kate Wiig leading a successful late summer musical, including many EMR members.

Things to improve upon are consistent with years past:

-We can always improve upon our communication and song selection process. However, to become more rigid in song choice and regular weekly member participation would greatly discourage our flexibility, "open door policy" and outreach philosophy.

-David Rosser could use more support running the audio and EMR is always in need of a knowledgeable, committed, person to help David and Charlie do what they do. Also, we are in need of clear documentation of the sound system and how it works etc.

-David Rosser also brought up the thought of phasing out older equipment to be exchanged for newer items as some of the equipment is slowly aging out or no longer functioning correctly.

For the next year we want to continue casting votes for decisions (by majority vote), keep up with our quarterly meetings with ministers and group meetings to discuss business, ideas and concerns – as has been done. It is important to all members of the group that it maintain a group in which everybody can participate, bring in suggestions, and continue to serve the congregation through music.



Fellowship Team

Leaders: Nellie Chenoweth and Nadine Keith

Gratitude to everyone who has helped with our events.

Activities — 2019/2020:

Heart & Hand Potluck: 10/25/2019

Holiday Dinner: 12/14/2019

Chili Cook-Off: 1/25/2020

Finance Team

Leader: Walt Jesteadt

Members: Daniel Byrd, Bob Hess, Louise Jeffrey, Christopher Schmidt, Peter Solfest, John Wagner

Activities & Projects — 2019/2020:

The Finance Team has responsibility for advising the Board, the Ministry Team and the Treasurer on the financial functions of the church and assists the senior staff in carrying out specific functions. Walt Jesteadt continued to serve as Treasurer as well as Finance Chair. Work completed under both headings will be summarized here, but finances for the year and a proposed budget for the 2020-2021 year will be presented in more detail in a separate report. The Sarah Joslyn Society, Stewardship and Capital Trust also are covered in separate reports.

- The past year was a transition year for church financial functions. Bill Ross retired from his central role of many years in handling all church accounting functions including the payroll. Payroll functions were contracted out to Payroll Maxx. We contracted with Cheri Cody, Treasurer at Second Unitarian, to review our accounting transactions for 2018-2019 and to serve as our accountant for 2019-2020. Cheri developed a revised budget for the year, entered into PowerChurch for the first time, which incorporated several categories of expenses previously handled with “non-budget” funds so that the expense reports would reflect the total cost of church operations. With Board approval, we eliminated many non-functioning accounts from the balance sheet.
- Most Finance Team members continued to perform specific functions as in the past. Walt Jesteadt handled monthly reports to the Board, monthly articles in *The Flame* newsletter, and automatic pledge payments through Vanco. Peter Solfest took responsibility for contribution statements starting in January. Louise Jeffrey worked on the Preserve Our Building campaign. Louise Jeffrey, Walt Jesteadt and Chris Schmidt worked on the Stewardship campaign. Daniel Byrd continued efforts to reorganize the Capital Trust for which he, Bob Hess and Chris Schmidt serve as trustees.
- In April, Walt Jesteadt and Cheri Cody submitted a loan application to Dundee Bank under the Cares Act to secure a non-repayable loan for approximately 10% of our budget for the coming year. The loan was approved by the Small Business Administration.
- Contribution Statements were mailed in August, January and April. We continued to email contribution statements to 75 households that gave us permission to do so.
- The Preserve Our Building Fund campaign was again held in January/February, with the help of Jamie Alexander and Louise Jeffrey. The fund total increased from \$75,069 in February 2019 to \$78,275.20 in February 2020.
- Forty-three members now pay their pledges by monthly automatic deposits handled by Vanco. There were several additions and deletions in the list, but the total number of participants remained the same. As in the previous year, all Vanco contributors were contacted early in the stewardship campaign and informed that we would assume continued contributions and a pledge unless we heard from them. This system of opting out rather than in works well. Contributions can now be made from credit cards as well as direct transfers from bank accounts using a Donate button on the church website or the Give+ app.

FUNdraising Team

Leader: Donna Neff

Team Members: Walt Jesteadt, Kathi Oliver, Katrina Schmidt, Sara Switzer and over 50 auction volunteers

Activities — 2019/2020:

Our primary tasks are to raise funds for the operating budget (\$15,000 goal this year), and oversee overall fundraising within the church with the Ministry Team. To date, we have raised about \$12,000, mostly from the Heart & Hand Auction, but also profit from the Chili Cookoff, and funds from use of Amazon Smile and Baker's cards (we no longer advertise either program but have continuing participants). Fellowship Team is our valued partner for anything with food!

This year's Halloween Heart & Hand Auction was Friday, October 25, 2019, with a skeleton theme. Katrina Schmidt, Kathi Oliver and Sara Switzer were auction tri-chairs, marking the first year I was not a co-chair for the auction. They did a terrific job! Around 90 people enjoyed a potluck, costume contest, raffle, door prizes, and both silent and live auctions of 179 items. This year had notably more physical items, but still had 50 items offering social connections, which is another goal of the auction. Kate Wiig was MC, and free childcare was offered with pizza, Halloween activities and the traditional children's costume parade. The "Humerus" raffle basket was won by Kim Callaghan; the "Bone Appetit" basket was won by Catherine Plumlee. Catherine also won the "Funny Bones" costume category as Skeletor. Taylor and Jessica Eman won the "Disney" category as Bert and Mary Poppins (with little Ezra as a penguin), and Sharon Conlon won the "Spook's Choice" category as Donald Trump. Online options to buy items ahead of the auction or purchase unsold seats after the auction were not heavily used. We continued to bill post-auction via email primarily, with \$11,509 in payments to date and \$2,138 still owed. The COVID-19 virus canceled numerous auction events and services and probably affected bill payment as well. Our team will track and reschedule all auction items affected. A heartfelt thanks to all you generous donors, buyers and volunteers who make our annual auction both a financial and community-building success. Photos below by Lillian McEvoy.



Hospitality Teams

Coordinator: Carolyn McNamara until 2/1/2020; Carrie Helmberger as of 2/1/2020

Team Leaders: Beth Conover/Linda Hruska, Kim Callaghan, Kay Lynn Goldner, Louise Jeffrey, Douglas Lee-Regier, Carolyn McNamara, Joe & Lori Schaaf

The Hospitality Teams concept began in 2014 as a new way to approach the Sunday morning tasks we are all familiar with. The goal is to provide opportunities for each church member to help serve the congregation and support the church service; to belong to a team that works together on a regular basis and take a turn in its leadership; to learn the work that is required to bring our service together, share the knowledge with other team members, and help improve the process; and to become an integral part of welcoming all newcomers to our church. New church members who are physically able and available on Sunday mornings are asked to serve on a Hospitality Team.

It takes about 108 volunteers (nine teams of approximately twelve people each) to make Hospitality Teams work. The teams are purposely large so that team members who are unavailable on the Sunday that their team is scheduled, can be absent without disrupting the smooth flow of the team's work. Currently, the average team has between six and ten members but more are needed. Each team serves six times per year—once every two months. Four teams serve one Sunday during each of the odd numbered months (September, November, etc.) and four other teams serve one Sunday during each of the even numbered months (October, December, etc.). A fifth team serves each time that there is a fifth Sunday in a month (generally four times per year). The Team Coordinator is the conduit between the individuals and teams that create our Sunday service and the Hospitality Teams that serve on any given Sunday.

Serving on a Hospitality Team takes about one hour and it only happens six times per year. Some people come in early to set up and some people stay a bit late for clean-up. Because everyone works together, nobody has to spend lots of extra time. Tasks include greeting congregants and visitors when they enter the church; taking up the offering; answering questions and giving directions; visiting with newcomers and helping them feel at home; and tidying up after the service. All of the tasks are documented and introductory training is offered. Team members are encouraged to rotate through the tasks to become familiar with every job.

Hospitality Team Leaders mainly do team coordination. The Team Leader checks to see who will be able to attend on Sunday and schedules who will perform each of the various roles. The tasks are rotated until everyone has a chance to become familiar with each one.

Serving on a Hospitality Team is rewarding and fun and we hope you will volunteer for one and join us!

Changes proposed for the coming year:

Setting up a table/desk in the foyer on Sunday mornings which would serve as a "welcome" desk with the clipboards/ brochures etc., a kind of mini-welcome table. Someone from the greeting team will sit at the table to answer questions, direct people to the nursery, etc.

Splitting the teams up into rotating groups of greeters and cleaner uppers—no ambassadors.

This will take some time and work. Carrie will poll people to see what type of team they want to be on, and ask people who are not currently on teams to join a team.

Go-live date TBD.

House & Grounds Team

Leader: Joseph Schaaf (but transitioning to Larry Goeser for the 2020/21 church year and hopefully beyond!)

Members: Daniel Byrd, Sharon Conlon, Bruce Godfrey, Bob Perrin, Dave Rosser, Dan Sullivan

Activities — 2019/2020:

This team worked on fewer projects this year but continued to maintain our infrastructure, including:

House:

- Fixed the wrap around one of the small entry tables in the foyer.
- Solicited bids for sanctuary audio/visual improvements, including cameras for improved and easier A/V recording of services for an improved online presence.
- Installed Ring doorbell system so that Church Administrator, Minister, and other key staff have access to video surveillance of most frequently used side-door entry.
- The sanctuary window progress was put on hold this year due to scheduling conflicts w/the artisan repairing the windows.

Grounds:

- Concrete work will need to be done on sidewalk—getting bids was challenging due to flooding issues from last spring/summer in the midwest that kept contractors very busy.
- Removed and stored smoking receptacle in order to adhere to new campus smoking ban.
- Maintained gardens.
- Five trees were planted: a Ginkgo tree, a Tree Lilac and three Serviceberry trees.
- Lee Helmsberger supplied mulch.

Membership Team

Past leader: Mike McAtee

Current leader: Carrie Helmsberger, Membership Coordinator

Activities — 2019/2020:

- Held regular quarter meetings to discuss current business and ongoing projects, took attendance, and documented meeting minutes on Google docs.
- Transitioned leadership of the team from Mike McAtee to Carrie Helmsberger, Membership Coordinator
- Facilitated new members joining Hospitality Teams through formal process integrated into Pathways curriculum.
- Took over hospitality teams on trial basis to re-organize
- Continued ReMembering articles featuring member write-ups regarding “why membership is important to me” for *The Flame* and new upcoming publication
- Welcomed 6 new members to the church.
- Assisted Membership Coordinator with Pathways class planning and execution.
- Promoted the Pathways class and First Steps at the Teams Fair.
- Sent welcome notes to 2nd time visitors, and separate communication to frequent visitors
- Updated Welcome/Visitors Table with current, pamphlets, pictures of new members, and information about church activities.
- Will plan new member celebration.

Neighborhood Ministry—“Neighborhood Care”

Leader: Catharine Dixon

Members: Rae Barry, Kim Callaghan, Gary Emenitove, Bob Hess, Carolyn McNamara, Donna Neff, David Rosser, and many others from our church and from the community who support this work.

Blessing Bag Day, held on October 11, 2019, was once again a success. Thank you! More than 100 blessing bags were made, and will be handed out to those in need who come to our church door. The bags contain various personal care items, socks, snack bars and bottled water. The office also gives out bus passes and gift cards to nearby restaurants and stores.

This team was thrilled to take part in the Stranger Share Our Fire service in December 2019 and collected many gift cards and bus passes for those in need during that service. After working with the staff team on that special service, the decision was made that we will call this team “Neighborhood Care” and the blessing bags will be called “care packages” moving forward.

Omaha Gives! (the one-day online giving event in May) and the change for change funds help keep this team going. This important work continues to fill a vital need, and helps close a gap in services to those in our neighborhood.



Nominating Committee

Members: Nellie Chenoweth, Mike McAtee, Carolyn McNamara, Kathi Oliver, Maria Wallace (convener)

Consistent with our by-laws, the Nominating Committee solicited congregational input to identify members qualified and willing to serve in elected positions, and then selected candidates. The committee thanks those who have expressed a willingness to serve in these positions.

Proposed Leadership Slate:

Board of Trustees:

Nellie Chenoweth (3 years)

Bruce Godfrey (3 years)

President-Elect:

Catherine Plumlee

Right Relations:

Della Bynum (2 years)

Deb McAtee (2 years)

Nominating Committee:

Mary Kay Peters (1 year)

Katrina Schmidt (3 years)

Sara Switzer (3 years)

Capital Trust:

Daniel Byrd (3 years)

Annual Awards:

Heritage Award — For significant contributions to preserving, understanding, and celebrating our Unitarian Universalist history: **Nadine Keith**

Religious Education Award — For outstanding achievement and excellence in religious growth and learning: **Ben Stallings**

Keeping the Faith Award — For keeping the UU faith alive in the community and touching the lives of congregation and community members in a positive way: **Louise Jeffrey**

Social Justice Award — For witnessing to the ideals of social justice and responsibility so important to our UU heritage: **Sharon Conlon**

Youth of the Year Award: **Simón Sanchez-Soto**

Young Adult of the Year Award: **Machaela Player**

Unsung Unitarian Universalist Award — For a lifetime of actions that inspire, support and express Unitarian Universalism: **Mary Kay Peters**

UU of the Year: **Kim and Brian Callaghan**

Thank you to everyone who helped in this process with suggestions and preparation of materials. The Annual Awards were presented during an online Zoom church service on Sunday, April 19, 2020. Awards were given out before the annual meeting to help alleviate the lengthy meeting agenda.

Office Team

Church Administrator: Catharine Dixon

Leader: Carolyn McNamara

Members:

Kim Callaghan	Volunteer Coordinator /Coffee Supplies
Kim Dunovan	Wayside Pulpit/Attendance
Linda Hruska	Orders of Worship
Charlie McMahon	Sound System
Carolyn McNamara	Orders of Worship/Office Shopper
Lois Norris	Paper Recycling
Dave Rosser	Office Assistant/Sound System
Vanessa Timberlake	Attendance Records

Friday Volunteers: Kim Callaghan, Kay Lynn Goldner, Barb Henney, Linda Hruska, Frank McKee, Roman Noriega, Peg Pidgeon, Evelyn Whitehill, Pat Will.

Activities & Projects — 2019/2020:

The monthly newsletter, *The Flame*, was discontinued with the last issue in January. We are grateful to *The Flame* proofreaders and folders: Kim and Brian Callaghan, Gary Emenitove, Linda Hruska, Scott Kemper and Lois Norris.

A new quarterly publication, *Chalice Connections*, was introduced in April of 2020. Editor Catharine Dixon is assisted by proofreaders Gary Emenitove, Scott Kemper, Carolyn McNamara and Lois Norris and by mailing team coordinator Kim Callaghan.

We now have over 740 people who receive the weekly enews and quarterly magazine *Chalice Connections*.

Kim Callaghan continues to do a great job performing as Volunteer Coordinator. She schedules and trains a team of dedicated volunteers who come in on Fridays to assemble the orders of worship, restock and organize pew racks, and prepare the sanctuary and foyer for Sunday service. We are very grateful for such a devoted volunteer staff. Linda Hruska prepared the slides for the streaming of Sunday morning services on YouTube, but streaming went on hiatus beginning January 2020. Special thanks goes to Bill Ross who helped every week with our video streaming over the past few years. The video streaming project has been put on hold, but the MTC plans to work on it once the COVID-19 shutdown ceases. For now, the church uses Zoom to host its online church events and meetings. Linda Hruska and Carolyn McNamara continue to work closely with the orders of service and other office projects. Gary Emenitove has helped with some important office projects including setting up online bill pay features for the church.

In addition to the ongoing commitments listed above, team members staff the office when needed, undertake special projects, organize, file, design, research, edit, proofread, revise, reformat, enter data, copy, recycle, and clean as time permits.

Catharine and all the office and finance team members are very sorry about the loss of Clyde Kramer who passed away in January 2020. Clyde was a dedicated, hard-working, fun volunteer, and he will be missed.

You can read more information about the hiring of Cheri Cody, bookkeeper, to help with accounting which in turns helps Catharine immensely, in the Finance Report.

Michael Young, an IT consultant, continues to be called on for as-needed office equipment and internet assistance.

Partner Church Team

Leader: Dave Olson

Members: Bob Hess, Nadine Keith, Anne Knapp, Ron Knapp, Deb McAtee, Val Murray, Sharon Piehler, Pete Piehler, Evy Rosser, Kandy Scott, Nancy Scott, Janet West

Activities — 2019/2020:

The Partner Church relationship has now been active for 15 years. We continued our support of the Firtosmartonos church this year, again donating \$1,320 to assist them in maintaining their Unitarian church, Sunday school and summer camps, and donating \$1,200 for scholarships for the village high school students. The money was raised via share the plate and other donations through the generosity of the congregation, the Women's Alliance, and the forbearance of our board in regard to our committee's lack of fund raising activities. In this light, the upcoming year will be a time for new decisions about our partner church relationship and how it has changed.

Due to a move to Arizona, I (Dave Olson) will no longer be able to serve as committee chair. In order for the Partner Church program to continue, we would need to find someone to guide it in an energetic, enthusiastic, and active way, such as was exhibited by Janet West over the years. The economic situation in Transylvania has improved significantly during the 15 years the program has existed, and they have fewer youth to support with scholarships than they had previously. Still, the opportunities for cultural exchange and to help with the maintenance of their old and beautiful church remain. Those of us who have been involved with the Partner Church program during its lifespan have been enriched in many ways by it. The people who live in Firtos are a lovely, outgoing, and warm community, just as our own church community is.

Thank you for allowing me to serve as chair of the program this year. I am happy to have been a part of it, as I have been blessed to be a part of our church in its entirety.

Sarah Joslyn Society

Chair: Deborah Duggan

Chair Emeritus: Dixie Lemon

Reception Committee Members: Deb Duggan, Kay Lynn Goldner, Louise Jeffrey, Carolyn McNamara, Lois Norris, Diane Withem

The Sarah Joslyn Society was founded in 2004 by Dixie Lemon to encourage, enable and thank those who wish to leave a bequest to First Unitarian Church or otherwise participate in the Planned Giving Program. The membership has grown from 32 original members to 78 who have named the church in their estate planning. Sarah Joslyn Society members receive a beautiful plaque made from an original slate tile from the church roof, which was procured by Dean Christensen and painted by Sandi Bruns. There is a yearly recognition gathering, usually in the fall, which began as a luncheon but has since morphed into a cocktail reception.

New member this year is Scott Kemper, who was welcomed at a cocktail reception in October. As is the way of life, we had to say goodbye to 1 member this year. The total of our members is 77, including 20 of whom are deceased.

These are the dedicated church members who have planted a tree so that others may enjoy the shade:

Jaime Alexander	Wendy Hessler	Dee Otte
Jacqueline Anderegg	Joe Hoagbin	Linda Parker
Anonymous I	Dick Holland	Bob Perrin
Anonymous II	Mary Holland	Jack Perry
Anonymous III	Betty Holloway	Yvonne Price
Bill Bruns	John Hruska	Dave Richardson
Sandi Bruns	Debbie Hunsberger	Jim Rogers
Linda Buehlmann	Louise Jeffrey	Raija Rogers
Eddith Buis	Walt Jesteadt	Ellen Shurson
Sharon Conlon	Bob Jones	Jim Simon
Carol Christensen	Diane Jones	Kim Simon
Dean Christensen	Dick Joslin	Liz Stawyczyj
Deb Duggan	Scott Kemper	Gretchen Thomas
Tim Duggan	Anne Knapp	John Thomas
Olive Erickson	Ron Knapp	John Wagner
Margot Fetrow	Dixie Lemon	Elaine Wells
Richard Fetrow	Harriet Major	Janet West
Audrey Freyer	Katherine Bester McClure	Evelyn Whitehill
Dale Freyer	Carolyn McNamara	Jim Wigton
Larry Goeser	Donna Neff	Judy Wigton
John Goldner	Dave Nicklin	Pat Will
Kay Lynn Goldner	Ruth Nicklin	Edith Wilson
Megan Gustafson	Christina Noriega	Sid Wilson
Lana Hammel	Roman Noriega	Diane Withem
Jack Heidel	Frank Norris	Ron Withem
Shelton Hendricks	Lois Norris	Judith Wright

Sister Church Team (Clair Memorial United Methodist Church)

Leader: Mark Loscutt

Members: Nadine Keith, Carol Ramsey, Rev. Michelle LaGrave (along with Micah and Bella)

Activities & Projects — 2019/2010:

Provided volunteers to the Clair Cares food pantry. Volunteers processed/re-packaged food items and distributed food to people.

Organized a fundraiser to help Clair buy a commercial refrigerator. The additional fridge was needed to increase the quantity and quality of food that can be received and distributed. Raised over \$600 from the congregation. After the money was raised, Clair received a used fridge for free from No More Empty Pots. We re-directed the money to Clair to use in tuning-up their fleet of refrigerators, and to buy needed food items which are not usually donated.

Social Justice Team

Co-Leaders: Sharon Conlon and Peg Pidgeon

Activities — 2019/2020:

The Social Justice Team coordinated the June Pride Parade with First and Second Unitarian Churches represented. A poster-making session was held the day before.

Sharon attended the October 2019 OTOC Leadership weekend conference at First Methodist Church and subsequently started attending and reporting to the OTOC Steering Committee, what our church has done since the last bimonthly meeting and it will do before the next one.

In December the new OTOC executive director, Sarah Keeney met with active church member in a small group after the Sunday service. In January, she introduced herself to the church by giving the Sunday sermon. Following the service a Social Justice Fair was held in the Common Room with these participants: OTOC Environmental Sustainability Action Team, OTOC Immigration Action Team, Tutoring at Wakonda Elementary School, Sierra Club, Planned Parenthood, Citizen Climate Lobby, CASA, Sustainability: Field to Fashion, UJME and Nebraskans for Peace Palestinian Rights Task Force.

At the 2019 GA the Action in Witness Resolution (AIW) was passed to “Support Our First Amendment Right to Boycott”. <https://www.uua.org/action/process/planning-aiw-ga> In January, church members signed a UUA petition and successfully got the Business Resolution “Embodying Human Rights in Our Investments Decisions” on the 2020 GA ballot. <https://www.uua.org/sites/live-new.uua.org/files/proposedbusres2020.pdf>

Sharon continues participating on the Unitarian Universalist Justice in the Middle East (UJME) monthly conference calls as well as the UJME Legislative Update monthly conference calls.

Throughout the year individual church members participated in these community demonstrations: Women’s March at the Courthouse, Lights of Liberty protest on Immigration at Memorial Park, Youth Climate Strike at the Courthouse, Impeachment Rally at Turner Park.

Soul Matters: Small Group Sharing Circles

Leader: Mike McAtee

Group Facilitators: Deb McAtee, Mike McAtee, Mary Kay Peters

Activities — 2019/2020:

- Successfully completed our inaugural year in June 2019. We had four groups with 33 total participants. Each group met once a month from September through June.
- Solicited feedback from first year participants using the Survey Monkey tool. We had a 61% response rate to our survey. A strong majority (74%) of the respondents were satisfied or very satisfied with their small group experience. A majority (52%) felt the program had a moderate to great impact on their spiritual growth, while 72% felt their group's facilitator was very or extremely effective in keeping the group on track and adhering to their covenant. When asked what they like best about their small group experience, the most frequent answer concerned making new connections or strengthening existing ones. Another frequent response had to do with the high quality of the monthly packets and the many theme related links to a wide range of materials including, music, poems, short readings, and videos. The least liked aspect of the program seemed to be the spiritual exercises which many felt was like doing homework.
- Continued the small group program into its second year (September 2019 – June 2020).
- Recruited one new facilitator.
- Maintained our four small groups from our initial year despite the loss of two facilitators. The number of active participants remained steady at 33, which was ideal given our desire to keep individual group size to around eight.
- Promoted the program through a pulpit talk, writing articles for *The Flame* newsletter, and holding abbreviated group sessions as part of Sunday forums.
- Moved meetings online during the COVID-19 pandemic using the Zoom meeting tool.

Women's Alliance — 2019/2020

Submitted by Louise Jeffrey

Women's Alliance has a long history in the church as documented in Pillars and Dreams: A History of the First Unitarian Church of Omaha (Richardson, 2018). It has also had periods of quiescence. After a number of years of significant activity, the Alliance has had a quiet church year. Commitments elsewhere have prohibited many members from assuming leadership positions and, indeed, from attending what had been monthly meetings from September to May, with January skipped. Our tradition has been to meet on the second Monday of the month for a social hour, followed by dinner and an educational speaker. Topics have ranged widely from science to the arts, to the history of the church, to matters relevant to Omaha, to matters concerning the world as a whole. This year's attenuated schedule included meetings in September (an organizational meeting), November (speaker from the Sierra Club), December (our annual white elephant gift exchange), and March (speaker from Youth Emergency Services). The planned April meeting did not occur because of the COVID-19 pandemic and the May meeting is similarly canceled. As of the time of this report, there are no plans for the 2020/2021 church year.

In addition to providing all who identify as women a pleasant monthly evening of socialization, the Alliance also raises money for the Merritt Scholarship fund and administers the awarding of these scholarships. In recent years, the Alliance has moved away from awarding a small annual scholarship to one of our youth in pursuit of undergraduate education, in favor of funding religious education or attendance at denominational meetings. This year the Alliance funded opportunities for the Director of Religious Education and for a church member both in pursuit of certifications and expertise in the Our Whole Lives educational program.

The sources of the funding for the scholarship program are a freewill donation at the monthly meetings (suggested amount \$15, which also pays for the cost of dinner) and an annual bake and craft sale which takes place at coffee hour on the Sunday before Thanksgiving. As of this writing there are about \$700 in the scholarship fund, and there is no reason to believe that these funds cannot be made available in the upcoming church year, regardless of other plans of the Alliance.

Worship Arts Team

Team Leader: Mary Thomas

Members: Kathy Alexander, Della Bynum, Megan Gustafson, Nadine Keith, Douglas Lee-Regier, Clacy Olson, Mary Kay Peters, Peg Pidgeon, Machaela Player, Catherine Plumlee, Dave Richardson, Maria Wallace, Klyde Warren, with Rev. Michelle LaGrave

Activities — 2019/2020:

The mission of the Worship Arts Team is to assure quality Sunday morning worship programming. We plan Sunday services when our minister is not in the pulpit and lay leaders (Worship Associates) assist in Sunday worship for both the minister and guests. The Worship Arts Team is proud to partner with worship and music leaders to help provide cohesive and meaningful worship experiences at First Unitarian Church of Omaha.

Our previous team leader, Denise Allain, moved out of state in April, 2019; Mary Thomas then worked to do the team leader responsibilities for the 2019-2020 year.

We had a booth at the annual church Teams Fair and recruited a couple of new members. Team member Dave Richardson had to leave the team when he took on his new role in the ministerial search committee. We always welcome new members.

Worship Associates did a good job with adapting their announcements at short-notice when pressing matters needed to be shared with the congregation. They also led other elements of the service, as needed. Services usually now put the Story for All Ages directly following the Chalice Lighting in order to more easily include our children/youth in both activities before they leave for RE.

Due to the COVID-19 pandemic, First Unitarian Church weekly services were moved online, using Zoom. Our first Zoom service was on March 15. The logistics for incorporating music, hymns, readings, and more continue to be fine-tuned. Worship Associates continue to serve each week. Services will be presented online through April, 2020 (and possibly for a longer period of time). We had over 90 "Zoom in" for the April 12 service (which represents more than 90 people, since there are some couples and families that use a single computer/tablet). After the Zoom service, many congregants stay on to participate in small Zoom groups for "coffee hour."

When Rev. LaGrave was unavailable in 2019-2020, we enjoyed sermons from visiting speakers including Ferial Pearson, Ph.D.; Rev. Dr. Jean Herlot; author Margaret Hines; Doshō Port Rōshi from Nebraska Zen Center; OTOC Executive Director Sarah Keeney; and more.

Additional speakers included church members Kabin Thomas, Mary Thomas, Mike McAtee, Ben Wallace, Tom Seguin, and others, and First Unitarian groups including Atheists, Humanists and Agnostics (AHA); Covenant of Unitarian Universalist Pagans (CUUPS); and the Christian interest group.

Other services about Mental Health, PRIDE weekend, the Heritage of First Unitarian Church, Resilience, and more were given. The Henry Lemon Sermon was delivered by Marie Sedlacek. The Rev. Sarah Voss also preached.

And through a pulpit exchange, sermons were delivered by Rev. Oscar Sinclair from the Unitarian Church of Lincoln and Rev. Cyndi Simpson from Second Unitarian Church of Omaha.

We have begun to plan for future months, including the upcoming summer services.

*The omission of any other names in this report was not intentional; it is simply due to the Team Leader's error. We are grateful to all who contribute to our worship experience each Sunday.

Youth Emergency Services (YES) Meals

Leader: Kim Callaghan

Members: Kay Lynn Goldner, Linda Hruska, Lois Norris, various casual helpers

Activities — 2019/2020:

First Unitarian Church has been providing monthly meals for the YES street outreach center on 26th and Harney St. for a little over two years. Youth Emergency Services' mission is to identify and assist the nearly 300 homeless and at risk youth in the Metro area. They provide a wide variety of services to the youth, including, but not limited to, emergency shelter, minor healthcare, personal/employment training and a food/clothing pantry.

In addition to our loyal team members, we have been joined by a variety of volunteers including Donna Neff, Wendy Buchholz, Kathy Andersen, and Peg Pidgeon. Bethany Cook has also brought some of her clients in to volunteer. A variety of food products including desserts, bread and rolls, fruit, have been donated to the cause by various church and non-church members.

Some months, we'll collect supplies for the street outreach center as the need becomes known. In October, Nebraska had an extreme cold snap before the various organizations normally do their cold weather collections. Members of First UU came through in a big way for the street outreach center!

As of April, YES has requested that any donated meals be prepared by licensed preparers, i.e.: restaurants, caterers, etc. For April, I am using Patricia's Catering in Bellevue, NE.



Appendix Contents

New Members

Staff

Bequests

2020-2021 Budget

2019-2020 Balance Sheet

Treasurer's Report

New Members since May 1, 2019

Judy Maniscalco 8/15/2019
Lillian McEvoy 12/15/2019
Machaela Player 12/15/2019
Tom Prenosil 12/15/2019
Frank Wagner 3/1/2020
Jean Wagner 3/1/2020

Staff

Rev. Michelle LaGrave, Interim Minister
Christina Strong, Lifespan Director of Religious Education
Carrie Helmberger, Membership Coordinator
Catharine Dixon, Church Administrator
William Miller, Choir Director
J Gawf, Choir Accompanist
Patricia Will, Organist
Stan Harper, Early Morning Risers Director
Judi Torneten, Musician
Andrea Laudi, Nursery Manager
Robert Medrano, Custodian
Rev. Dr. Sarah Voss, Affiliated Community Minister

minister@firstuomaha.org
dre@firstuomaha.org
coordinator@firstuomaha.org
admin@firstuomaha.org
choirdirector@firstuomaha.org

EMRdirector@firstuomaha.org

childcare@firstuomaha.org
admin@firstuomaha.org

Bequests

Memorial bequests were given to First Unitarian Church this year by:

Jo Ann Carrigan
Barbara Ross

**FIRST UNITARIAN CHURCH TREASURER'S REPORT
ANNUAL CONGREGATION MEETING - MAY 3, 2020**

	2019/2020 Last Year's Budget	Change From Last Year's Budget	2020/2021 Proposed Budget
Income:			
Pledged Contributions	237,000	13,000	250,000
Investment Income	38,880	(4,880)	34,000
Fund Raising	15,000	(500)	14,500
Use of Facilities	22,550	(10,050)	12,500
Total Plate Collections	10,300	(3,100)	7,200
Non-Pledged Contributions	15,000	(10,000)	5,000
Memorial Gifts	5,000	(4,000)	1,000
Other Income - Interest	4,520	(520)	4,000
Other Income - Misc	800	100	900
Barb Ross Bequest	21,087	(21,087)	
Holland Fund Contribution	25,000	(5,000)	20,000
Transfer from Reserves	5,821	19,179	25,000
Proceeds from PPP Program		41,000	41,000
Total Income	400,958	14,142	415,100
Expenses:			
Minister	127,882	9,920	137,802
Office & Administration	93,125	3,916	97,041
House & Grounds	37,116	(132)	36,984
Religious Services (incl music)	31,129	1,658	32,787
Religious Education	57,292	(694)	56,598
Denominational Affairs	23,453	1,452	24,905
Discretionary & Team Funds	30,961	(1,978)	28,983
		-	
Total Expenses	400,958	14,142	415,100
Surplus or (Deficit)	(0)		(0)

Balance Sheet (as of 3/31/20)

ASSETS

Premier Bank - Checking	98,267
Premier Bank - Savings	2,844
Office Petty Cash	190
Certificats of Deposit	201,991
Accrued Inc/Prepaid Exp	3,657

TOTAL ASSETS

306,949

LIABILITIES

Payroll Deductions	558
Minister's Discretion Fund	250
Deposits - Building Rent	6,150
Capital Trust Cash Account	6,501
Prepaid Pledges	23,473
Unallocated Bequests	15,027
Wilson Bequest - Music	24,725
Holland Contribution	50,000
Tubach Church Painting	500
Sanctuary Windows Project	22,911
Anniversary 150 - Donation	958
Preserve Our Building Fund	78,275
YRUU/OCUUPs/WA	8,608
WA Merrit Education Fund	707
YES / Community Meals	3,098
Financial Aid/Caring Funds	4,388
Music Donation Income	5,595
RE Donation - Nather 2014	2,321
Partner Church Fund	510
Prior Year's Transactions	(2,486)

TOTAL LIABILITIES

252,069

NET ASSETS

Curr Yr's Surplus/Deficit	(2,764)
Prior Surplus/Deficit	57,644

TOTAL EQUITY

54,880

TOTAL LIABILITIES AND EQUITY

306,949

SPECIAL FUNDS (as of 4/14/2020)

Board Investment Fund	478,553
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Music Fund	7,676
Women's Alliance Fund	<u>12,946</u>
TOTAL INCLUDING SPECIAL FUNDS	<u><u>806,124</u></u>

Comments on the 2019/2020 Treasurer's Report and 2020/2021 Proposed Budget

Results for 2019-20

We have revised our accounting procedures this year so that we show almost all of our income and expenditures as part of the church budget rather than relying on non-budget accounts for special initiatives. We now use PowerChurch software for generation of all financial reports. As part of this process, we have eliminated many unnecessary accounts to simplify our balance sheet and have transferred the money in those accounts to income. This is income that we will not have in future years, but it helped offset unique expenses this year as well.

We agreed as part of the supplemental stewardship campaign in the Fall of 2019 to use money from the unallocated Barb Ross bequest as a source of matching funds for new contributions. We obtained \$21,087 in new pledges and therefore took that amount from Barb's \$25,000 bequest as income. As a result, it was not necessary to use any of the Richard Holland bequest as income. In the course of consolidating our investments at one financial institution (see the Capital Trust report), we used \$41,107 in gains from the Board Investment Fund as investment income, rather than taking 4% of the Trust. We had \$237,000 in pledges at the end of the supplemental campaign and it appears that we will have about that much in pledge contributions by the end of the church year. Income from rental of the church for weddings is down this spring as a result of the Coronavirus pandemic, but most other income categories are on budget. Expenses for the new minister search were lower than expected as a result of use of Zoom in place of some in-person visits. We are still waiting for final end-of-year numbers at this point, but may finish the year with a small surplus.

Stewardship Campaign

The goal for the stewardship campaign this spring was \$280,000, \$43,000 over the end result of the previous campaign. The additional funds were required to close the gap between income and expenses in previous budgets, pay for \$15,000 in moving expenses for the new minister, higher costs in salary and benefits for the new minister, the costs of a part-time accountant, another \$5,000 reduction in Richard Holland's annual pledge, and other costs covered in previous years from non-budget accounts. As of April 15, 2020, we had 86 pledges totaling \$187,921. The budget has therefore been revised to assume total pledge income of \$250,000, but it will take work and perhaps another supplemental campaign to reach that goal.

Proposed Budget

The proposed budget of \$415,100 is 3.5% above last year's revised budget. On the expense side, we have assumed an average 3% merit increase for members of our staff, plus a larger increase for Shari Woodbury as our settled minister. Her contract calls for a salary, including housing, of \$89,012, starting on August 1, 2020. If Rev. Michelle had stayed another year, her salary would have been \$82,727. The budget shows a weighted average of their salaries. Other expenses are budgeted assuming a continuation of all of our programs although the pandemic could lead to reductions. On the income side, the impact of the pandemic on rental income, investment income, and fund raising is unclear. We have assumed reduced income from most sources with the exception of pledge contributions. That too could change. The loss of income will be offset by use of \$25,000 in existing reserve funds, plus \$41,000 from a non-repayable loan under the Payroll Protection Program of the Cares Act. The loan has been approved and will be received on April 22. It will create a large surplus this year to be applied to next year's budget. We should not need to access the principal of the Board Investment Fund, but will be able to do so if pledge contributions decline.

(continued on next page)


Balance Sheet

We made major progress this year in cleaning up and simplifying the balance sheet. The balance sheet shown in this report is based on data available from our March financial reports with further consolidation of some accounts approved by the Board in April. To further simplify the report, we have grouped other accounts, such as YRUU, OCUUPs, and the Women's Alliance, on a single line. A final end-of-year balance sheet and a budget showing end-of-year results will be posted on the church website in May.

Current values of three funds managed by the Capital Trust are shown at the bottom of the balance sheet. The value of the Board Investment Fund is currently less than the \$500,000 value of the bequests used to create the fund, but it should be noted that \$41,107 in gains from the fund were used as investment income during the 2019-2020 church year.

The value of the Capital Trust itself is not shown on the balance sheet, but is given in the Capital Trust annual report. As of April 14, 2020, it was \$561,010.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "W. J. J. J. J.", is written below the text "Respectfully submitted,".



Church Anniversary Quilt

June 2019

Nancy Scott and Barb Dewell



Auction golf event: Mike McAtee, Dave Richardson, Rev. Michelle LaGrave, and Jamie Major



Revival of Newton Mann: Superstar show on August 24, 2019
A celebration of 150 years of First Unitarian Church of Omaha