

UUFB

# Annual Report

2019-2020 Program Year



Unitarian Universalist Fellowship of Bozeman  
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## Minister's Annual Report

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The 2019-2020 UUFB church year has been quite an incredible one. A celebration of the **Fellowship's 60th anniversary** as a member congregation of the Unitarian Universalist Association (UUA) was a significant focus in the fall of 2019. The Fellowship was "born" in 1959 when a small discussion group in Bozeman voted to affiliate with the American Unitarian Association, one of the two predecessors of the UUA. To celebrate our 60th year the Rev. Tandi Rogers, our staff contact person from the Pacific Western Region, came to Bozeman in mid-October and spent three days offering training and leading our worship service on October 13. It was a wonderful celebration that helped us remember our history and invited us to think about what this Fellowship could be 60 years from now.

As the Fellowship begins its 61st year, we are looking to the future. Last year we adopted a new Mission Statement. This year we will be voting on a **new Vision Statement**. The proposed UUFB Vision Statement was created by members of the Vision Task Force who invested significant time and energy in the process.

As has been the case for the past several years, **our membership and attendance at Sunday Services have continued their upward trend**. Our membership is approaching 150 and approximately 75 people identify as "friends of UUFB." Attendance reached a point this year where it became clear that we needed to look into the possibility of adding a second service. We have frequently had over 100 people attend on Sunday mornings. At one service in January we had 153 people in the building. This was just 9 people less than the City of Bozeman has set as our maximum building capacity.

This year we had **numerous staff changes in our Religious Education and music programs**. After having served as the Coordinator of Religious Education (CRE) for 11+ years, Marie Lynn retired at the end of July. In October, Beth Witte accepted the CRE position and she was installed at our Sunday service on October 20. Soon after that we hired Christine Wilcox as our new Nursery Care Provider. Faila and Marisa Bianchini were also hired to assist in the children's RE class and the nursery.

In August our pianist, Erin Henke, moved to the Boston area to begin a master's degree program in music. Laurel Yost was hired as our pianist in September. The 2020 pledge drive was very successful and after the Annual Meeting in January Laurel also took on the role of Music Coordinator. One of her first tasks was to find and hire a part-time Choir Director. In February Hannah Anderson was hired for the position and she led the choir for the first time at our service on March 1.

By mid-March the spread of the **COVID-19 virus** meant that we could no longer function in the manner we were accustomed. On March 15 about 30 people attended our service in person and we had almost as many who were viewing the service via Facebook live. This was the **first time a UUFB service was live-streamed**. The following Sunday we began exclusively live-streaming our services. We weren't prepared technologically to hold a regular service on March 29, after the Governor issued a stay at home order on the 26th. Instead of a regular service that day we had a virtual social hour which was attended by about 50 people.

The idea of live-streaming our services has been a topic of discussion for several months with no definitive answer arrived at, until COVID-19 forced the issue. Within a matter of days, the decision was made to begin live-streaming our services. Now that we have made that decision, I believe **we will continue to live-stream services** from here on out. The online attendance for the live-streamed services increased each of the first 5 weeks and then leveled off at a number that is similar to what we would typically expect at an in-person service. And former members, friends and visitors from all over the country have been able to attend these online services. It seems to me that there is no down-side to live-streaming our services. On the flip side, there are a number of positive reasons to continue the practice even after we are able to come together in the

sanctuary again. Along with online services, on April 26 we began weekly online social gatherings after the service.

As I said at the beginning of my report, this has been quite an incredible church year. Last summer and fall none of us could have imagined that as spring 2020 arrived we would no longer be gathering in our building for meetings, to socialize or for Sunday services. The COVID-19 virus and responses to curtail its spread have challenged us as a Fellowship, as a country and as a world. At UUFB we have met the challenge because of the commitment and dedication of our members, friends and staff to our Principles, to our Fellowship, and to one another. I want to express my gratitude and appreciation to all of you. You are an amazing group of people and I feel privileged to be your Minister.

Rev. Duffy Peet





# UUFB Board of Directors

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## Board Members

- Tonya Stevens – President
- Peg Wherry – Vice President/President Elect
- Lee McGill – Secretary
- Janine Roberts – Treasurer
- Paul McVey – Member-at-Large
- Tam Miller – Member-at-Large
- Duncan Chambers (June-October) /Leona Poritz (November-May) – Member-at-Large
- Rev. Duffy Peet - Ex-Officio

## Board's Mission

The Board has general charge of the property and funds of the Fellowship, the conduct of all its business affairs, and the control of its administration, including the appointment of such committees as it may deem necessary.

## Goals and Fulfillment

At a special session in July, the Board decided to focus on three main goals this year, with sub-goals to achieve those:

1. **Seek alignment with our Mission:** A Vision Task Force was named and charged with producing a Vision statement for review by the congregation in May, which they accomplished. Due to the need for emergency action this spring, laying the foundation for a long-term planning process was delayed.
2. **Embrace growth:** Board members Peg Wherry and Paul McVey increased the frequency of Program Council meetings, re-focusing members on roles and responsibilities of committees and chairs. To encourage leadership, a Leadership Workshop for the congregation was held in October; two delegates (Peg Wherry and Dana Murray) were supported to attend the UUA Pacific Western Region Leadership Experience 2020 in January. Our Board liaison and Rev. Duffy, along with a Two Services Task Force, determined the triggers for instituting two Sunday services. The Board added positions and responsibilities for music personnel in 2020; hired a new CRE and started the search process for a RE teacher, and added paid aides for the nursery.
3. **Advance options for giving:** Dick and Louise Corbin began looking into development of planned giving. Online giving was launched on our website this spring with texting, credit card, and bank transfer options available. Related to this, an estate planning workshop was brought to UUFB members and friends from MSU Extension.

## Issues addressed this year

The Board investigated and rejected buying the property next door (321 N 25<sup>th</sup>) and established a group to examine the Welcoming Congregation Renewal process (still working on creating procedure). We also got bids and authorized installation of assistive hearing devices, though work was not completed by the end of April due to the COVID-19 emergency.

### **March 2020 COVID-19 pandemic and subsequent Stay-At-Home directive**

The Board closely followed Governor Bullock's and the Gallatin County Health Department's directives as the nature of the coronavirus COVID-19 became clear by mid-March. The Board closed the building to all use; we quickly set up the ability to livestream Sunday Services; a Caring Cluster was created to contact all members. Having closed the building to all uses, the Board voted against opening the building for homeless the last two weeks of March when the City Warming Center abruptly closed. The Board met five times in March, three times in April, and will continue more frequent meetings in May as needed. The Board authorized Rev. Duffy to re-prioritize his and other staff duties in light of pandemic. The May Annual Meeting was replaced by mail-in voting with a Zoom Town Hall held the week before. Mail-in ballots were sent to all members to vote on the slate of proposed Board candidates for 2020-2021 and to adopt the proposed Vision Statement.

### **Recommendations for Next Program Year**

1. Focus on maintaining safety for the congregation while working on a comeback plan.
2. Transition to serving a 150-member Fellowship by developing appropriate committee and working group infrastructure for building management, grounds keeping, tech wrangling, stewardship, and fundraising.
3. Carry over goals not fully completed this year.

Report Submitted by Tonya Stevens with help from the Board

## Vision Task Force

### **Task Force Members**

- Jack Fisher
- Neil Gregersen
- Andrew Kestly
- Mariah Rundberg
- Rev. Duffy Peet - Ex-Officio
- Tonya Stevens - Ex-Officio

### **Vision Statement**

By Task Force members Jack Fisher, Neil Gregersen, Andrew Kestly, Mariah Rundberg  
Ex-Officio: Rev. Duffy Peet, Tonya Stevens

### *We of the UUFB*

*Knowing that the diversity of our beliefs and backgrounds, coupled with our deeply held shared values gives us unique and necessary strengths,*

*Striving, as a compassionate, just, caring and supportive community, to continually find ways to stay dynamic and receptive to those who seek a spiritual home,*

*Fostering spiritual growth and discovery by encouraging vibrant religious education and exploration for all ages and providing a safe space to discuss, test and share new ideas,*

*Endeavoring to put our principles into action as recognized leaders who boldly and bravely act for social and environmental justice in our local community and beyond,*

*Remaining at the forefront with those advocating for and enacting personal and community solutions to the climate crisis,*

*Aspiring to be a strong, arching bridge with local, state, and regional faith communities, collaborating with those who share common values and holding creative discourse with those who challenge us in our search for larger truths,*

*Will move forward into an uncertain future with grace and humility, fostering compassion and love, claiming our prophetic heritage, and making our fellowship, larger community and world a safer and better place.*



## **SOURCES OF WISDOM FOR CREATION OF THE VISION STATEMENT:**

The Vision Task Force began to meet in June 2019 and completed its task in early March 2020. Responses from the members found in these documents were first analyzed for Vision ideas:

- August 27, 2017: Sticky notes from the first service in new building
- September 2, 2017: Retreat responses to “UUFB role in community”
- February 4-18, 2018: Mission/Vision groups
- November 30-December 2, 2018: Stewardship cottage meetings

A Visioning Workshop with Rev. Tandi Rogers, our Congregational Life Consultant from the Pacific Western Region of the UUA, on October 12, 2019 resulted in modifying our task considerably to creation of a 60-year+ vision instead of a five or 10 year one. We gathered further input from the Fellowship from these documents:

- October 13 and November 3, 2019: Sticky notes from 60th anniversary Sunday service “What does UUFB need to focus on in the next 5 years to carry forth our mission?” (during the service verbally extended the “Five Years” to “the future”)
- December 2019: Survey Monkey questions asking what should be the UUFB vision
- December - January 2019-2020: Input from GVIA members and other Montana UU’s

Also considered: Our 2006 vision statement; Criteria for a good vision statement; Out-of-state UU vision statements.

We are indebted to all UUFB members and friends who participated in any of the above meetings and surveys and to the leaders who kept notes and compiled responses. Your visions for the future of the UUFB are truly remarkable.

## 60<sup>th</sup> Anniversary

### **60th Anniversary Celebration of the UUFB – October 13, 2019**

On October 13, 2019, the UUFB celebrated our 60<sup>th</sup> anniversary with a service led by Rev. Tandy Rogers, who is the Congregational Life Staff member for the Pacific Western Region of the UUA.

The service included a PowerPoint presentation of our Fellowship's events over 60 years, in the context of world and U.S. history. Created by Sandra Oldendorf, the PowerPoint included photos of all of the places we had met in over the years when we were known as the "Church in a Subaru." There were wonderful photos of our activities through the years that demonstrate our commitment to our mission statement. Also included were photos of our Ministers and congregants and documentation of the remodeling of and moving into our first ever and present building at 325 N. 25<sup>th</sup>.

A large time-line from 1959 – 2020 was displayed in the Social Hall, along with photos and scrapbooks kept over the years. The time-line began with a RE class in the '90's and was completed by Susan Backer. Photos of our five Ministers, Rev. Mary Scriver, Rev. Lois Van Leer, Rev. Jackie Ziegler, Rev. Dr. Nina Grey, and Rev. Duffy Peet were installed as a permanent fixture in the Social Hall. A small booklet with a sermon from each of those Ministers was created by Susan Backer and published; copies were placed in the UUFB library and available for purchase by Fellowship members.



Bill Goold, interviewer, and Finn Saalborn, video recorder, produced historical remembrances about the Fellowship from JoAnne Troxel, Gordon Julian, Sara Williams, Susan Backer and Laura Mentch. This played during the celebration after the worship service in the RE room. It is currently available for viewing on the UUFB website, [uufbozeman.org](http://uufbozeman.org) (on the home page, click on "read more" in the photo of the timeline). The Social Activities Committee decorated the Social Hall beautifully with fall flowers, and produced a gala celebration following the worship service with an anniversary cake, elegant finger foods, champagne and juices.

Members of the planning committee were: Sandra Oldendorf, Bill Goold, and Susan Backer, along with Sue Slade working on invitations and Susan Anderegg who provided photos and graphics. Social Activity Committee members were Bonnie Andes, Rene Keating, Joy LaClaire, Barbara Graham and Leona Poritz. Christy Huddleston, our Office Administrator, provided invaluable assistance.

Submitted by Susan Backer

## Two Services Task Force

### **Task Force Members**

- Dave Rockafellow - Committee on Ministry
- Robyn Lauster - Hospitality and Membership
- Sandra Oldendorf - Sunday Services
- Jack Day - Religious Education
- Tonya Stevens - Board President
- Rev. Duffy Peet - Ex-Officio

### **Short Narrative**

The purpose of this Task Force is to determine the criteria for when our Fellowship might need to hold two services. Our purpose also includes the costs both in terms of people and money, if we move to two services. The Task Force convened in the fall and reported to the Board in January. After the COVID-19 emergency prohibited services in the building in March and April, the Task Force met again in April to discuss holding two services to meet social distancing guidelines.

### **Activities/Accomplishments**

Our report to the Board in January addressed the following issues:

- Ways to handle increased attendance up to legal building capacity, including how to use the Social Hall for additional seating and livestreaming the service.
- Identifying a “trigger point” of consistent attendance of 110 or more adults and children (about 80% of sanctuary capacity) for deciding to hold two services. A graph of attendance is on the next page (created by Dave Rockafellow).
- Additional ideas and alternatives were considered, including holding two *different* kinds of services such as an alternative, perhaps more informal service (done by a committee other than Sunday Services); an Adult RE or Adult Lyceum; and holding an alternative service on a different day of the week. We also discussed ways to increase participation and meet the needs of more people, such as opportunities for small group ministries. This may or may not impact the attendance on Sunday mornings.

### **Our original (January) recommendations for two services were as follows:**

- Service times of 9 and 11 with services being close to identical
- Childcare at both services
- Religious Education at one service
- Social time (about 30 minutes) between services
- Annual meetings and potlucks to be held after second service

### **Additional information needed about the impact of two services includes:**

- Obtain a budget estimate from impacted committees
- Make a parking assessment
- Informally consult with parents about RE issues
- Consult with the Social Activities Committee about Sunday morning events
- Determine the time of Annual Meetings

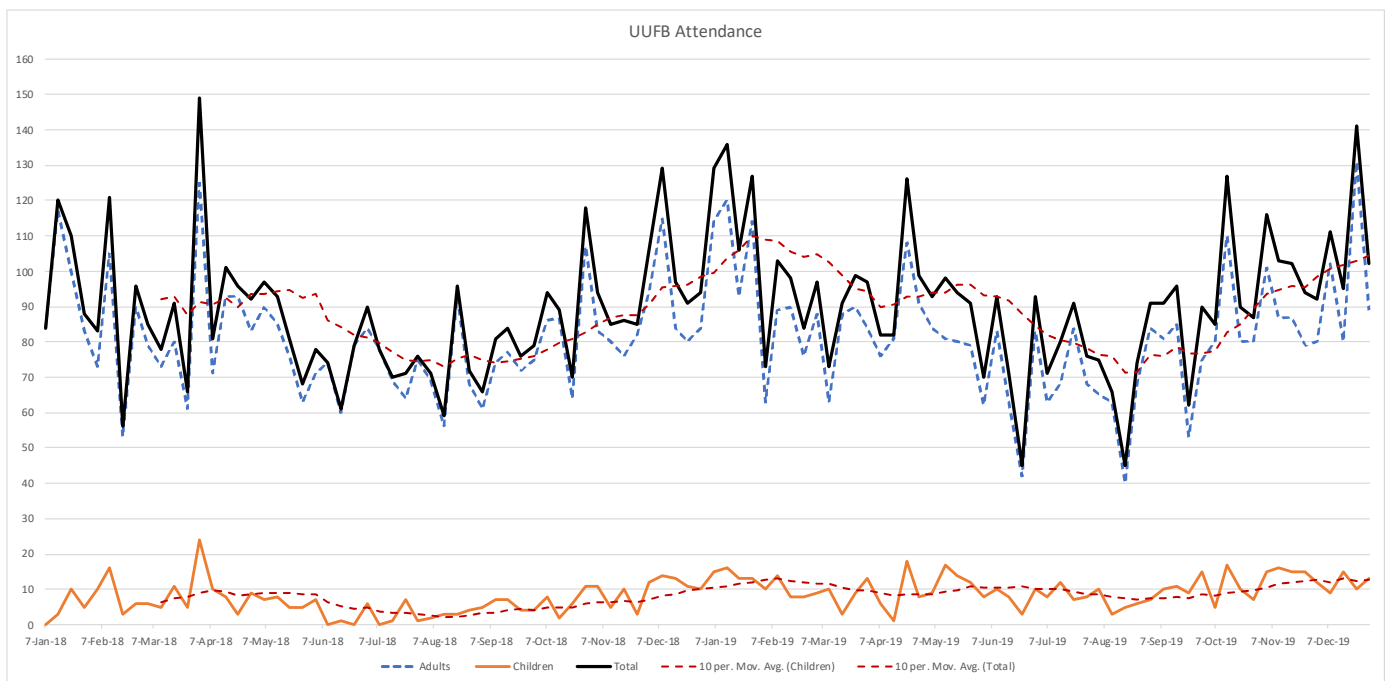
At the Board’s request in February, we gathered information about the costs involved in holding a second service, covering:

- Honorarium for lay speakers
- Honorarium for clergy guest speakers
- RE and Childcare
- Membership and Hospitality
- Music (including Music Director, rehearsal pianist, choir director, guest musicians)

**Recommendations for Next Program Year**

After one month of not holding services in our building due to COVID-19, the Two Services Task Force met again on April 23, 2020 to discuss how we might re-open the building using two services as a way to physically distance our members. Our discussion included positioning of chairs and cleaning chairs and hymnals between services. Concern was raised about face-to-face RE and how to keep children physically distanced. Coffee hour would not be held.

Report Submitted by Sandra Oldendorf



2018		
Average Adults	Average Children	Average Total
81	6	87
Std Dev	Std Dev	Std Dev
15	5	18

2019		
Average Adults	Average Children	Average Total
82	10	92
Std Dev	Std Dev	Std Dev
18	4	20

2020		
Average Adults	Average Children	Average Total
Std Dev	Std Dev	Std Dev

Total Count Equal to and above 110 6  
 Total Count Equal to and above 120 4  
 Total Count Equal to and above 130 1

Total Count Equal to and above 110 8  
 Total Count Equal to and above 120 6  
 Total Count Equal to and above 130 2

### Committee Members

- Cami Armijo-Grover
- Bill Goold
- Mary Maifeld
- Jo Anne Troxel
- Mattie Whitehouse
- Rev. Duffy Peet - Ex-Officio

The Caring Committee reflects on the needs of the congregation by offering meals, rides, phone calls and letters of encouragement in difficult times. We believe in our Covenant and in the spirit of helping one another. All of our meetings are held in strict confidence and nothing is shared with others in our congregation. We do not delve into giving advice or into the family dynamics of the people we serve.

In the past year we have sent approximately 25 cards and notes, made innumerable phone calls, arranged for meals and rides to medical appointments, given away soup and treats from our own larders. In this difficult time of our worldwide pandemic, Cami and Mary helped set up telephone contacts with every member of our congregation, becoming involved either as one doing the calling or as one on the receiving end of a call. We have several elderly members who are living alone and we want to pay particular attention to these people. When we all gather back together again we don't want anyone missing.

Report Submitted by Mattie Whitehouse

# Committee on Ministry

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## Committee Members

- Elizabeth Rose - Chair
- Dave Rockafellow
- Sue Slade
- Beth D'Atri
- Linda Clark
- Rev. Duffy Peet - Ex Officio

## Committee's Mission

- Focus on all aspects of the Congregation's ministry in light of the mission statement by working with the Minister, the Board and other committees.
- Ask committees (and the Board and the Minister) to reflect on the particulars of their ministry, assess their ministry and plan for the future, all in light of the mission statement.
- Perceive concerns brought to or recognized by the committee, reflect on those concerns, and develop proposals to relevant bodies who may best address them.
- Conduct periodic Ministerial reviews and congregation assessments.

## Activities/Accomplishments

- Our primary goal for the year continued to be taking a leading role in supporting leadership in developing processes, policies and communication patterns that better support a pastoral-sized congregation.
- Reviewed and discussed "Best Work Portfolio" presented by Rev. Duffy.
- Began assessing the ministry of the Fellowship by making individual visits to committees, asking them how their work is going, and discussing how the transition from a family-sized to a pastoral-sized congregation impacts their work. We still have a few committees to visit, but planned visits for this spring have been delayed because of COVID-19. Here are highlights from the committees we visited:
  - Need for more committee members, particularly younger members.
  - Concern for the implementation and potential impact of two services.
  - Challenge of establishing more rigorous procedures appropriate to a pastoral congregation as opposed to less formal approaches.
  - Need to define and align the mission of each committee with the UUFB mission.
- Began designing an assessment process for receiving input from members and friends of the Fellowship who are not currently on committees or the Board. This process will be delayed until we can have face to face meetings.
- Revised and simplified the Ministerial assessment process and sent the revision to the Board in April for approval.
- Continued to keep abreast of the visioning process.
- Continued to respond in a timely manner to QACC input. We are currently working on a plan to make QACC available on our web site.
- Sent a representative to UUFB Program Council meetings.
- Continued to be in close contact with the Board as well as with the Governance/Leadership Committee and the Two Services Task Force.



**Recommendation for Next Program Year**

- Continue primary goal of taking a leading role in supporting leadership in developing processes, policies and communication patterns that better support a pastoral-sized congregation.
- Continue Ministerial and Fellowship assessment processes.
- Complete a plan to make QACC available on our web site.
- Continue to respond in a timely manner to QACC input.

Report Submitted by Elizabeth Rose

# Facilities Committee

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## Building and Grounds Committee

### Committee Members

- Carolyn Boyd and Randy Babbitt – Co-chairs
- With help from Suzy Sterling (inventory and purchasing), Mike Clark

### Committee's Mission

This committee is responsible for general building upkeep and repair

### Activities/Accomplishments

#### BUILDING:

- Weekly cleaning was done by Brenda's Cleaning Inc. until the end of March. A spring deep cleaning was done by about 15 UUFB volunteers on May 18, 2019. A practice of using only non-scented cleaning items was implemented beginning in November 2019.
- The process for taking down and setting up chairs in the sanctuary was revised in May 2019. It is available from the Office Admin, Carolyn, and there is a copy in the Building and Grounds cupboard.
- A process for washing dishes for large events was developed with the help of volunteer dishwashers. A copy is hanging behind the cupboard door above the dishwasher in the kitchen.
- Carolyn participated in Interior Design Committee meetings related to installing cupboards in the hallway for committees and RE to store needed items.
- A new projector was installed by Poindexter's on a beam in the sanctuary in June 2019. Mike coordinated most of that.
- Joy LaClaire acted as Waterer-in-Chief for the indoor plants for the past year.
- Repairs to the front door latch, kitchen plumbing, and windows were done by Mike and Randy.
- Mike provided training in June 2019 on how to run the AV system for several members of UUFB.
- We have researched a Hearing Assist system for UUFB and have quotes from Poindexter's.

#### GROUNDS:

- An ad hoc UUFB landscaping group formed to plant perennials; drip irrigation was installed throughout the front garden in July 2019. Joy LaClaire potted flowers and maintained the decorative planters on the front patio.
- Bear Paw Landscapes came to readjust sprinkler heads with Randy's help in summer to prevent water hitting the building. Bear Paw continues to take care of shoveling and snow removal for us.
- Big Al's (young college student) was hired to do grass cutting and trimming in 2019.
- Mike Clark helped install gutters to the north side of the building in the fall of 2019. He and Randy laid heat tape in roof gullies and into the downpipes to prevent ice buildup. Two exterior outlets and interior electrical controls were added for heat tape plug-in.
- Rev. Duffy and his wife Sandy chopped down and removed a dead aspen tree from the front lawn.

## **Recommendations for Next Program Year**

1. A group should be developed with responsibility for overseeing the grounds keeping.
2. A schedule for inspecting the building and for maintenance of appliances, systems, and built-in components should be developed.
3. Continue to work toward finding the most efficient storage for the items now in the shed and in the storage area on the outside of the building,
4. Add Spring Cleaning to the calendar of annual tasks for May.

Report Submitted by Randy Babbitt and Carolyn Boyd

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## **Interior Design Work Group**

### **Group Members**

- Barbara Lantz
- Rose Toth
- Valley Peters
- Diane Knipfer
- Jan Young

The primary accomplishments of this group were the decisions on classroom hallway cabinets, RE classroom cabinets, and cabinets, desk, and shelves for the RE Coordinator's office. Up until COVID-19 required that we close the building, most of this was installed. Still to be done is a cabinet in the nursery hallway and a countertop in the classroom. The measuring, ordering and installation were accomplished primarily by Barbara Lantz with shelves installed by Andrew Kestly. The group also made decisions related to the LGBTQ flag with a display flagpole, and the ordering of a map of the Native American lands.

### Finance Committee

#### **Committee Members**

- Bruce DePriester – Chair
- Tam Miller
- Janine Roberts
- Paula Milano-Nielsen
- Tonya Stevens
- Rev Duffy Peet - Ex-Officio

#### **Committee's Mission**

- Assist the Board in managing the financial resources of UUFB.
- Develop policies to guide UUFB in spending and accounting for its financial resources.
- Conduct Internal Financial reviews every two years.
- Meet monthly depending on the issues at hand.
- Commitment to the well-being of UUFB.

#### **Activities/Accomplishments**

- Established necessary financial processes to ensure UUFB's assets are prudently managed and accounted for.
- Assisted Treasurer in development of the 2020 Budget.
- Increased UUFB Reserves with annual budgeted additions.
- Established a UUFB Endowment Fund.
- Paula Milano-Nelson joined the Finance Committee in March 2020.

#### **Recommendations for Next Program Year**

- Assist the UUFB Board with managing finances during 2020's challenging operating and financial environment.
- Assist the Corbins in their efforts to develop UUFB Planned Giving.
- Continue to work with the Office Administrator on improving UUFB's financial processes.

Report Submitted by Bruce DePriester

The "Financial Snapshot" is a one-page overview of the status of our budget vs. expenditures as well as the balances in our reserves, endowment, and other accounts. This is where things stood at the end of calendar and budget year 2019.

December 2019 UUFB Financial Snapshot						
	12/31/19	2019	(Over)/Under		1/1/19	12/31/19
<u>Revenue</u>	<u>Actual</u>	<u>Budget</u>	<u>Budget</u>		<u>Balance</u>	<u>Balance</u>
Pledges	\$170,397.49	\$170,000.00	(\$397.49)			
Plate Offerings	\$11,449.77	\$10,000.00	(\$1,449.77)			
Fundraising	\$10,251.88	\$10,000.00	(\$251.88)	Checking	\$74,144.00	\$92,086.22
Rental Income	\$805.00	\$1,500.00	\$695.00	Savings	\$9,736.00	\$9,737.84
Savings Interest	\$1.95					
<b>Total Revenue</b>	<b>\$192,906.09</b>	<b>\$191,500.00</b>	<b>(\$1,406.09)</b>	Endowment	\$4,585.00	\$5,608.35
<b>Expenses</b>				Long Term Fac Reserve	\$3,063.00	\$6,167.66
Minister	\$57,638.76	\$57,705.00	\$66.24	Minister Sabbat. Res	\$5,397.00	\$11,668.65
Office Administrator	\$28,974.87	\$29,512.00	\$537.13	Operations Reserve	\$28,063.00	\$35,387.33
RE Staff	\$10,850.55	\$13,079.00	\$2,228.45			
Pianist	\$2,829.55	\$3,520.00	\$690.45	NF Capital Imp. Fund	\$0.00	\$518.09
Workers Comp	\$216.82	\$447.00	\$230.18	NF Fellow/Dev Fund	\$315.00	\$892.67
<b>Total Staff</b>	<b>\$100,510.55</b>	<b>\$104,263.00</b>	<b>\$3,752.45</b>	NF Justice/Out Fund	\$1,189.00	\$1,413.93
Bank Charges & Fees	\$588.36	\$80.00	(\$508.36)	UUFB Total Assets	\$126,492.00	\$163,480.74
Building & Grounds	\$9,587.55	\$9,715.00	\$127.45			
Committees & Board	\$2,926.09	\$3,488.00	\$561.91	Construction/Capital Campaign Account		
Community Outreach	\$1,526.62	\$2,025.00	\$498.38	Construction Checking	\$21,585.00	\$15,514.29
Dues & Subscriptions	\$11,335.54	\$11,333.00	(\$2.54)			
Insurance	\$3,485.00	\$3,886.00	\$401.00			
Membership Software	\$639.70	\$1,640.00	\$1,000.30			
Minister Professional Exp	\$3,870.57	\$4,500.00	\$629.43	OWL joint account	\$2,962.00	\$3,450.19
Mortgage	\$25,817.04	\$25,817.00	(\$0.04)	with Pilgrim		
Office Expenses	\$3,974.59	\$2,300.00	(\$1,674.59)			
RE	\$1,140.45	\$1,750.00	\$609.55			
Sunday Services	\$4,213.47	\$4,100.00	(\$113.47)			
Minister Disc. Fund	\$0.00	\$500.00	\$500.00			
Reserves	\$9,684.00	\$9,684.00	\$0.00			
Utilities	\$5,931.35	\$6,000.00	\$68.65			
<b>Total Expense</b>	<b>\$185,230.88</b>	<b>\$191,081.00</b>	<b>\$5,850.12</b>			
<b>Net Cash Flow</b>	<b>\$7,675.21</b>	<b>\$419.00</b>	<b>(\$7,256.21)</b>			
Pass Thrus	\$14,103.88	\$9,250.00	(\$4,853.88)			

The "Financial Snapshot" is a one-page overview of the status of our budget vs. expenditures as well as the balances in our reserves, endowment, and other accounts. This is where things stood at the end of the first quarter of 2020.

March 2020 UUFB Financial Snapshot						
	3/31/20	2020	Over/(Under)		1/1/20	3/31/20
<u>Revenue</u>	<u>Actual</u>	<u>Budget</u>	<u>Budget</u>		<u>Balance</u>	<u>Balance</u>
Pledges	\$95,731.23	\$188,189.00	(\$92,457.77)			
Plate Offerings	\$2,172.46	\$11,000.00	(\$8,827.54)			
Fundraising	\$700.13	\$10,000.00	(\$9,299.87)	Checking	\$97,496.22	\$78,327.42
Rental Income	\$235.00	\$500.00	(\$265.00)	Savings	\$9,737.84	\$9,738.32
Savings Interest	\$0.48					
<b>Total Revenue</b>	<b>\$98,839.30</b>	<b>\$209,689.00</b>	<b>(\$110,849.70)</b>	<b>Endowment</b>	<b>\$5,608.35</b>	<b>\$4,801.82</b>
<u>Expenses</u>				Long Term Fac Reserve	\$6,167.66	\$5,358.31
Minister	\$14,739.80	\$59,388.88	(\$44,649.08)	Minister Sabbat. Res	\$11,668.65	\$10,137.44
Office Administrator	\$7,676.73	\$30,709.00	(\$23,032.27)	Operations Reserve	\$35,387.33	\$34,218.77
RE Staff	\$2,935.70	\$14,048.00	(\$11,112.30)			
Music	\$1,282.47	\$5,090.00	(\$3,807.53)	NF Capital Imp. Fund	\$518.09	\$450.12
Staff Workers Comp	\$216.31	\$606.00	(\$389.69)	NF Fellow/Dev Fund	\$892.67	\$775.53
<b>Total Staff</b>	<b>\$26,851.01</b>	<b>\$109,841.88</b>	<b>(\$82,990.87)</b>	NF Justice/Out Fund	\$1,413.93	\$1,228.39
Bank Charges & Fees	\$15.87	\$590.00	(\$574.13)	UUFB Total Assets	<b>\$168,890.74</b>	<b>\$145,036.12</b>
Building & Grounds	\$1,646.28	\$6,950.00	(\$5,303.72)			
Committees & Board	\$505.24	\$5,238.00	(\$4,732.76)	Construction/Capital Campaign Account		
Community Outreach	\$336.00	\$2,080.00	(\$1,744.00)	Construction Checking	\$15,514.29	\$11,982.67
Dues & Subscriptions	\$2,821.77	\$11,400.00	(\$8,578.23)			
Insurance	\$3,715.00	\$3,780.00	(\$65.00)			
Membership Software	\$150.00	\$600.00	(\$450.00)			
Minister Professional Exp	\$1,001.67	\$4,800.00	(\$3,798.33)	OWL joint account	\$3,450.19	\$1,234.06
Minister Disc. Fund	\$0.00	\$500.00	(\$500.00)	with Pilgrim		
Mortgage	\$6,454.26	\$25,817.00	(\$19,362.74)			
Office Expenses	\$1,166.67	\$3,525.00	(\$2,358.33)			
RE	\$149.00	\$2,350.00	(\$2,201.00)			
Sunday Services	\$558.97	\$4,900.00	(\$4,341.03)			
Utilities	\$1,723.71	\$6,300.00	(\$4,576.29)			
Reserves	\$0.00	\$9,849.00	(\$9,849.00)			
<b>Total Expense</b>	<b>\$47,095.45</b>	<b>\$198,520.88</b>	<b>(\$151,425.43)</b>			
<b>Net Cash Flow</b>	<b>\$51,743.85</b>	<b>\$11,168.12</b>	<b>\$40,575.73</b>			
Pass Thrus	\$3,736.32					



## Stewardship Committee

### **Committee Members**

- Peg Wherry - Chair

### **Brain Trust**

- Elizabeth Rose
- Jo Anne Troxel
- Louise Corbin

### **Committee's Mission**

To plan and carry out an annual campaign to communicate with members and friends about the financial needs of the Fellowship and encourage them to pledge their support to the operating budget.

### **Activities/Accomplishments**

In the fall of 2019, we celebrated the 60<sup>th</sup> anniversary (Diamond Jubilee) of UUFB's affiliation as a Unitarian congregation, thus the theme of the Stewardship Campaign was "60 Years . . . and a Diamond Bright Future!" The primary event of the campaign was holding a "Commitment Sunday," the November 10 Sunday morning service as an opportunity to make a commitment to UUFB's future.

The service included testimony from the James and Heather Watson family, Ken Pierce, and Lisa Trankley about the value they find in the Fellowship and how that shapes their thinking about giving. There was also time for those attending the service to respond to questions about their "money story"—how they learned about money and shaped their values on giving. People were invited to turn in their completed pledge forms that day; that group of pledges totaled 45% of our overall goal.

Pledge communications specified that reaching our goal would allow UUFB to:

- Give our employees cost-of-living raises of 1.8%
- Hire a Religious Education teacher to allow separating our children into two different age groups
- Hire a Music Coordinator

The amount of money pledged allowed funding for these efforts to be included in the 2020 budget.

### **Relevant numbers:**

**Goal:** \$190,000

**Total amount pledged:** \$188,189, 99% of goal

**Average Pledge:** \$1,792.27

**Number of pledges:** 105, a more than 16% increase over the previous year

### **Recommendations for Next Program Year**

The same as every year: start earlier!

Report Submitted by Peg Wherry

## Fundraising Committee

### **2020 Committee Members**

- Leona Poritz
- Peg Wherry

### **2019 Committee Members**

- Janet Lewis
- Leona Poritz
- Carol Stahl
- Peg Wherry
- Jan Young

### **Mission**

The **Mission** of the Fundraising Committee is to raise funds for the general operating budget from a variety of activities. Those activities included: Garage Sale (August), Services Auction (Spring), Art Sale (Fall), Treasure Sale (December) and Book Sale (permanent bookshelves and Fall/Winter/Spring sales).

### **Activities**

The Garage Sale is a large endeavor requiring people power and time and utilized the entire Fellowship building and required a big clean up and reset of the sanctuary (August 2018). The Service Auction (Spring) is a very popular event and raises almost half of our fund-raising revenue. It is labor intensive as well and events continue throughout the year by individuals who have donated a service, class or meal. This event provides a social occasion and many interactions among members all through the year. The Treasure Sale occurs in early December and is well received for holiday shopping. The Book Sale from our permanent shelves and also held on two or three separate Sundays is an easy, quick event.

The Art Bazaar in the fall was revived in 2019 and included many artists from the community. It was decided to hold this event every other year.

### **Goals**

One of the committee goals is to expand our events to the larger Bozeman community and tap into a broader income stream. Several new ideas were explored for fundraising events: scrip, raffle dinners, around the world airfare & travel, plant sale & a UU cookbook.

### **Dollar results**

- Art Bazaar: \$2,010.45
- Book Sales: \$1,387.81

### **Recommendations**

Unofficial Chairpersons Janet Lewis and Jan Young took the leadership reins for the largest events (auction and garage sale) to make them successful. Both members have stepped into other roles and the committee now needs several new members to get involved for the upcoming efforts in this new year. While there are many friends/members we call upon to help with each event, what is needed is Leadership for this committee. In the past, we have had individuals serve as the Auction Chair and that may be a possibility again—a one and done commitment. With the COVID-19 virus, we have not had our Spring Auction and we may need to hold it

at another time in the upcoming year. We may need to develop a protocol for accepting books in the near future as well.

Submitted by Leona Poritz



## Investment Committee

### **Committee Members**

- Paul Stouffer – Chair
- Bruce DePriester
- David Rockafellow

### **Committee's Mission**

The Investment Committee provides the Board of Directors of the Unitarian Universalist Fellowship of Bozeman with recommendations to manage investment risk and optimize investment returns for the UUFB's Endowment Fund and a consolidated account representing three funds and three reserves.

### **Activities/Accomplishments**

In January, the committee reported to the Board and congregation that the two accounts, both invested in socially-responsible based portfolios with Charles Schwab and with the management assistance and advisement of Bozeman-based NorthFork Financial, showed significant returns for 2019. Consistent with all financial markets reacting to the global pandemic and uncertainty, both portfolios are down as of April 30, 2020.

### **Recommendations for Next Program Year**

After June, the committee would like to review the portfolio allocation again with NorthFork. When the stock markets move up or down, the percentage of assets allocated between stocks and bonds will also change. Unless UUFB's long-term financial goals have changed and therefore their allocation between stocks and bonds should change, then rebalancing back to the long-term allocation may be warranted.

Report Submitted by Paul Stouffer

## General Assembly

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Ten congregation members/friends from UUFB attended the **UUA General Assembly** in Spokane that took place June 19th-23rd. Attendees reported experiencing inspiration, frustration, joy, and outrage over issues past and current that were addressed, and gratitude for the diverse body of UU members and skilled leaders we were exposed to in Spokane. One afternoon, UUFBers met with members of other UU congregations from across Montana and discussed options for getting together within the state.

Our delegates voted on several matters including bylaw amendments regarding voting, Actions of Immediate Witness, and election of new officers of the Board of Trustees.

We brought home a myriad of new ideas and resources and numerous new books for the UUFB library.

### Recommendations

Send as many UUFB representatives as possible to the Virtual GA of 2020. These delegates should present a service to describe the experience afterwards.



Back row: Tonya Stevens, Rev. Duffy Peet, Jan Young, Peg Wherry, Sandra Oldendorf  
Front row: Sandy Kindt, Alicia Smith, Marie Lynn  
Reclining: Topsy Tella Thunderpaws (Tella)  
Not pictured: Janet Lewis, Dick Young

## Governance and Leadership Committee

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### **Committee Members**

- Pamela G. Poon – Chair
- Jack Fisher
- Larry Carucci
- Dick Young
- Rev. Duffy Peet - Ex-Officio
- Elizabeth Rose - Ex-Officio (Committee on Ministry liaison)
- Tonya Stevens - Ex-Officio (Board Liaison)
- Peg Wherry - Ex-Officio (Board Liaison)

### **Activities/Accomplishments**

1. Created the agreement for working together
2. Helped prepare for last June's Board Retreat
3. Nominated members to attend the Pacific-Western Regional leadership conference
4. Is designing a method to maintain and strengthen leadership capital
5. Has completed the search process for a slate of nominees for next year's Board leadership

### **Recommendations for Next Program Year**

We will continue our duties as directed by the UUFB Board.

### **Relevant numbers**

We serve the entire Fellowship as we identify, develop and support quality leadership and good governance in our Fellowship.

Report Submitted by Pamela G. Poon, Chair



# Hospitality and Membership Committee

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## Committee Members:

- Susan Backer – Contact Person
- Kitty Donich
- Jennifer Fehr
- Robyn Lauster
- Mariah Rundberg
- Darla Timmons
- Tonya Stevens – Board Liaison
- Rev. Duffy Peet – Ex-Officio

## Committee's Mission

We welcome visitors, members, and friends each Sunday morning and follow up with first-time visitors. We contact potential new members. Twice a year we offer UUFB orientation and membership classes along with Welcoming Ceremonies. We recognize and help integrate new members into the life of the congregation. We keep the membership list current and as accurate as possible, continuously updating a Members and Friends Directory while in communication with the Fellowship's Office Administrator. We identify and contact attendees who drop away. We meet monthly, and our committee shares leadership responsibilities.

## Activities / Accomplishments

- We focused each monthly meeting on becoming familiar with our committee's documents as they pertained to each month or upcoming activities
- We coordinated new guest cards to include a way to track how folks find out about us, adding a place for preferred pronouns. Christy will add pronouns to nametags as people request. Susan Anderegg provided graphics for the back of the card. Kitty provided a basket with preferred gender nametag stickers until they began to be added to nametags.
- *We have provided coffee and beverage service and clean up to the congregation every Sunday, in spite of this not being a part of our written charge from the Board.* We spent a great deal of time over the year trying to refine the coffee/beverage clean-up, so greeters didn't have to be involved. Jennifer Fehr is happy to do the setup but needs help on clean-up. Asking for clean-up volunteers was not totally successful. In May of 2019 we submitted a rationale and three possible plans for the Board to consider in order to move our committee out of the Coffee Preparation and Clean-up service. ***This is a high priority for our committee in order to provide the best attention and time to our mission.***
- We held two Orientation Sessions. At the November 24 Welcoming Ceremony, we added five members: Tom and Dana Murray, Heather and James Watson, and Sally Russell. The March Orientation was presented in person and via Zoom. On April 5 we added six new members: Adria Brandvold, Kim Curren, Liz Elam, Andrea Hamre, Greg Kregar and Kayla Wright. We are holding their "virtual" signings of the Membership Book.
- Nametag boxes were culled and relabeled. Robyn attended Second Sunday Task Force meetings for us. Kitty spearheaded updating the Directory. We worked with the Safety Task Force to identify issues particular to greeters. Susan updated the Welcoming Ceremony. Kitty worked on streamlining our Greeter Tasks document.

- We collaborated with the Caring committee to form a “Caring Connection” for contacting every member and friend of the congregation to ascertain needs during the COVID-19 Pandemic and to assist in providing information about needed phone calls and volunteer help to those who may need it.

**Recommendations for Next Year**

- We would like to add two to three more folks to the committee.
- We hope the coffee and clean-up issues will be addressed by the Board.
- Much depends on how the Fellowship proceeds while the country deals with the COVID-19 virus.

Submitted by Susan Backer

# Lifespan Religious Exploration Committee

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## Committee Members

- Ita Killeen – Chair
- Jack Day
- Dana Murray
- Neil Schwarzwald
- Heather Watson
- Rev Duffy Peet – Ex-Officio
- Beth Witte, Coordinator of Religious Exploration (CRE) – Ex-Officio

This year the LRE Committee has made progress towards our goal of creating classes, events and programs that encourage spiritual growth in people of all ages.

Through these programs and classes, we hope to:

- Provide grounding in Unitarian Universalist identity
- Teach the seven UU Principles to guide daily life
- Contribute to spiritual development
- Explore the “big questions” of life
- Examine what it means to be “ethical” and live an ethical life
- Foster faith development
- Present ways in which we carry faith into the world

A major change for the LRE program this year was the retirement of Marie Lynn, who was the Coordinator of Religious Exploration (CRE) for 11 years. Beth Witte was successfully recruited and hired as CRE and has invigorated the program by recruiting a cadre of regular volunteers to assist with the children’s program.

## Committee’s Mission

The Lifespan Religious Exploration Committee is dedicated to providing learning opportunities for all ages, both structured and unstructured, within an inquiring religious community. These opportunities are designed to foster spiritual growth while developing and strengthening healthy values in a safe, nurturing environment.

## LREC Committee work:

- Worked with the Board to revise the CRE job description; a Search Committee advertised broadly and interviewed three well qualified candidates. The Search task force consisted of Diane Knipfer, Dana Murray, Valley Peters, and Neil Schwarzwald.
- Additional funding was recommended and approved in the 2020 budget for:
  - Increase in childcare funds to allow childcare for UUFB activities and committee meetings.
  - Funding for a Religious Exploration teacher to allow for two Sunday morning class for children. This will allow further age appropriate grouping of children.
- The Committee has discussed how to make the entire UUFB more family-friendly. A quiet activity box was developed, and TV-VCR was made functional to allow quiet child accompaniment of parents to meetings.
- Discussion and review of safety policies that involve children was begun.

## Children’s Religious Exploration Programs

Summer Sunday RE was initially folded into a one-room class for all ages. This did not fit the needs of children and so separate nursery (toddler) & RE class (ages 4-10 years) were re-formed and staffed. The UUA Soul Matters curriculum was adopted for Sunday RE classes which coordinates monthly themes with those used in Adult Services.

## RE Communications with parents

- Religious Exploration Corner in the UUFB monthly newsletter includes RE news and updates
- Soulful Home curriculum is made available to families for integrating themes from the Soul Matters curriculum at home

## Staff

- Marie Lynn retired after 11 years as Coordinator of Religious Exploration. The CRE job description was updated and a search committee was formed.
- Sandy Kindt served as interim RE teacher August-November 2019.
- In October, Beth Witte was hired as the UUFB new CRE.
- Nursery staff was recruited:
  - Faila Bianchini, youth assistant, started summer 2020
  - Christine Wilcox, Nursery Caregiver, started December 2020.

## Volunteers

- 30 volunteers were recruited to assist in Sunday RE classes and received Orientation in March 2020.

## Space

The Interior Design committee worked to get a new desk and shelving for Beth’s office and to install new cabinets in the RE Classroom. New cabinets are also available for RE storage in the hallway.

## Activities/Relevant Numbers

We had 24 children (ages 4-12) sign up to participate in RE classes on Sundays. Our monthly attendance varied but averaged about 40 class attendees per month with higher attendance rates in winter and lower numbers in summer and spring (due to COVID-19).

Attendance per month for June 2019 - April 2020

Month	Attendance
June	40
July	37
August	19
September	52
October	40
November	56
December	55
January	54
February	50
March	26
April	21

We also held an Open House for Children's LRE in February 2020 and two Volunteer Orientations, in February and March.

### **COVID-19 Accommodations**

- Sunday service went online in March 2020 and Sunday morning RE was offered by Zoom online in April as well, after the Zoom service.
- Recruitment of the additional RE teacher has been postponed due to COVID-19.

### **LREC Recommendations for Next Program Year**

- Continue to review and update children's safety policy.
- Continue to review UUFB life through the lens of "family friendly."
- Divide Sunday morning children into three age-appropriate groups and provide staff for each
  - Nursery
  - ~Kindergarten to second grade RE class
  - ~Third to fifth grade RE class
- Complete recruitment and hiring of a RE teacher to staff the additional Sunday morning children's class

Report Submitted by Ita Killeen, Beth Witte, CRE; Neil Schwarzwaldner

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### **Adult Religious Exploration**

Adult RE facilitates adult education classes and discussions. Members and Friends with an interest are encouraged to submit a proposal.

### **Courses offered**

- *An Indigenous Peoples' History of the United States* discussion, led by Sandy Kindt and Bill Gould, UU Common Read. First group completed three-session course; a planned second group was cancelled due to COVID-19 crisis.
- Foreign Affairs Discussion Group. Using the Great Decisions program from the Foreign Policy Association, completed eight sessions in 2019 and four sessions in 2020 before COVID-19 crisis.
- Equity and Inclusion Discussion Group averaged 5-11 individuals for book/article discussions, ~20-25 for films. Books included *So You Want to Talk About Race* by Ijeoma Oluo, and *Biased: Uncovering the Hidden Prejudice That Shapes What We Think, See, and Do* by Jennifer Eberhart. *UU World* Spring & Summer issues featuring articles on transgender issues were discussed.
- Documentary Films viewed: "Transitive Property" and "Thirteenth."

Report Submitted by Ita Killeen, Beth Witte, CRE; Neil Schwarzwaldner

## Youth Group

The youth group has averaged two meetings per month with typical participation of four to seven youth (maximum 11).

February and March meetings were not held due to scheduling difficulties. The focus of meetings alternated between social activities and social service activities including:

- Volunteered at Food Bank.
- Participated in Cardboard Box City with ~10 UUFB children/youth/adults staying overnight. Fundraiser for Family Promise.
- Hosted an Intergenerational Hunger Banquet as fundraising effort for Gallatin Valley Food Bank and Oxfam, ~ 25-30 participants.
- Collected and delivered gift bags for unhoused youth to the Bozeman School District, greeting cards contributed by RE children.
- Hosted a Cookie Decorating Party for RE children and parents (~20 participants).

### **COVID-19 accommodation**

- Starting April 7, Christine Wilcox and Ita Killeen have held weekly one-hour online Zoom meetings for youth, with three to four middle school and one to two high school participants. This meeting consists of chalice lighting and centering activity, games, and a brief discussion of a topic.

### **Youth Group Adult Volunteers**

- Ita Killeen, Becca Spear. Christine Wilcox joined the team in April. Drew Hanes helped as MC for the Hunger Banquet.
- Ita attended Online Youth Advisor Training March 14 provided by Eric Bliss, Youth Specialist for UUA Mountain Desert District and PWR.

### **Youth Group LREC Recommendations for Next Program Year**

- Continue to build a sense of cohesion in the Youth Group through various social and service activities.
- Continue to provide volunteer opportunities for local and global agencies
- Improve a feeling of connection to the UUFB congregation
- Foster UU Faith Development through education based on UU values.

Report Submitted by Ita Killeen, Beth Witte, CRE; Neil Schwarzwald

## Interfaith Our Whole Lives Committee

### **Committee Members**

- Laura Mentch (UUFB) – Chair
- Ita Killeen (UUFB) - Treasurer
- Dana Murray (UUFB)
- Megan Makeever-Ali (Pilgrim UCC Co-director, Young Adult and Family Ministry)
- Lauren Katz (Pilgrim UCC)
- Sarah Orms (Community)

### **Committee's Mission**

The *Interfaith Our Whole Lives* Committee (IOWLC) was formed in 2007 as a collaborative effort between the Unitarian Universalist Fellowship of Bozeman (UUFB) and the Pilgrim Congregational United Church of Christ (PCUCC). The purpose of this committee is to support and coordinate sexuality education efforts within congregational programming, choose the best resources and facilitators, and sustain the program budget for training expenses, curricula, and program materials

### **Activities/Accomplishments in 2019-2020**

The *Interfaith Our Whole Lives* Committee reorganized in Fall 2019, adding Dana, Megan, Lauren and Sarah. We've held regular meetings to plan for future *Our Whole Lives* programming. Two informational meetings with congregations and with potential facilitators were held at Pilgrim UCC and UUFB in October 2019 and January 2020. Four individuals were chosen for a seventh to eighth grade facilitation team and attended secondary level training together in Grand Junction CO, February 2020. Laura is meeting with this facilitation team to plan a seventh or eighth or eighth grade *Our Whole Lives* for the 2020-2021 year. A potential team of three individuals is in the process of forming and planning for training in Colorado Springs, CO in November 2020.

### **Recommendations for Next Program Year**

- *Our Whole Lives* for up to 16 youth in grades seven or eight or grade eight beginning September 2020.
- Identify and train facilitation team to offer a fifth-sixth grade *Our Whole Lives* in Spring 2021.
- Reach for offering kindergarten to first in Spring 2021; identify and train facilitation team.
- Consider capacity to provide *Our Whole Lives* facilitator training in summer 2021. Discuss potential with likely partners in Montana to determine training needs for elementary, secondary, or adult *Our Whole Lives*. Planning involves creating a volunteer team to plan and support training and choosing dates, location, and trainers.

### **Active Facilitators**

- Kassia Finn (St. James Episcopal Church), trained for elementary (2017) and secondary (2020)
- Tom Murray (UUFB) trained for secondary (2020)
- Anna Stone (UUFB friend) trained for secondary (2020)
- Jill Ellison (community) trained for secondary (2020)
- Laura Mentch (UUFB) trained for elementary, secondary and adult *Our Whole Lives*
- Spencer Williams (Pilgrim UCC) "retired" after facilitating fifth-sixth grade 2015-2018

Report Submitted by Laura Mentch and Ita Killeen

## Spiritual Pluralism Groups

### Buddhist Study Group

The UUFB Buddhist Group meets once-a-month, usually on a late weekday afternoon at the Fellowship Social Hall. A key premise of the group's explorations and discussions focuses on a shared belief that the UU "Spirit of Life" foundational basis ties in nicely with the Buddhism premise that all we see and experience is the result of natural laws – not divine wills and whims. Buddhism reading topics are selected and discussed. Meetings open with a check-in round-robin of attendees. Each meeting closes with a 15-minute group (sangha) meditation sitting. All are welcome regardless of prior experience and/or knowledge of the history, precepts and practices of Buddhism.

Report Submitted by Paul McVey

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### Humanist Group

#### **Group Members**

- Sara Williams - Convener
- David Andes
- Sandra Oldendorf
- Gene Quenemoen
- Norm Eggert
- Neil Schwarzwald
- Dick Young
- Eric Nielsen
- Patsy Culver
- Wally Johnson

**The Humanist group meets approximately every two weeks with an average of eight people in attendance.** Our discussions are focused on a variety of topics that we think are important to humanists: the history and formation of the humanist movement, current events that impact our lives with an emphasis on science and reason as a guide in response to these issues. The group usually has a book or article to discuss at each meeting.

We have had one meeting via Zoom and will continue to meet in this way until we can reconvene in person.

The Humanist group presented a Sunday service to the UUFB in February 2019. The Sunday Services Committee has suggested that we present another program. Stay tuned.

Report Submitted by Sara Williams



## Personnel Committee

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### **Committee Members**

- Diane Debinski
- Paul McVey
- Eva Patten
- Dick Young
- Rev. Duffy Peet – Ex-Officio
- Tonya Stevens – Ex-Officio (Board Liaison)

### **Charge to Committee**

- To assist the Minister and the Board in the management of UUFB staff positions.

### **Accomplishments for 2019-2020**

- Implemented the Personnel Committee Policy passed by the Board May 9, 2019
- Established members of the committee
- Assisted in developing job descriptions for RE and Music positions
- Developed an orientation program for new employees
- Updated the Employee Benefits Policy and submitted it for Board Approval
- Updated the UUFB Personnel Handbook making it compatible with the UUA recommendations along with State and Federal Laws

### **Next Year**

- Review grievance procedures
- Review staff assessment procedures
- Review procedures for advertising for positions, interviewing candidates, background checks, exit interviews, etc.
- Be available to Minister and Board for any assigned tasks

Submitted by the Personnel Committee

## Program Council

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### Members

- Peg Wherry – Convener (Board Vice President)
- Paul McVey - Recorder (Board Member-at-Large)
- Neil Schwarzwald (Adult Religious Exploration)
- Carolyn Boyd (Building & Grounds Committee)
- Mattie Whitehouse (Caring Committee)
- Elizabeth Rose (Committee on Ministry)
- Janet Lewis (Fundraising Committee)
- Bruce DePriester (Finance Committee)
- Pam Poon (Governance & Leadership Committee)
- Susan Backer (Hospitality/Membership Committee)
- Diane Knipfer (Interior Design)
- Jan Young (Interior Design & Sunday Services Committee)
- Jack Day (Lifespan Religious Exploration)
- Ita Killeen (Lifespan Religious Exploration)
- Laura Mentch (*Our Whole Lives* Interfaith Committee)
- Dick Young (Personnel Committee)
- Joy LaClaire (Safety Task Force)
- Bonnie Andes (Social Activities)

### Committee's Mission

Program Council is a gathering of Fellowship leaders charged with responding creatively to common concerns and providing opportunities to reflect together on ways to do the work of the Fellowship. It is made up of chairs of all standing committees and is convened by the Board's Vice-President and a Member-at-Large. It also includes the Minister, the CRE, and representatives of other groups when needed. Program Council meets roughly every other month.

### Activities/Accomplishment

At the August meeting, Program Council reviewed some of the documents on the UUFB website under "General Information on Committees" under the Members and Friends tab and identified "improving the effectiveness of UUFB's committees" as a goal or focus for the year. For example, can we both streamline and stabilize how our valuable committees carry out our programs, activities, and mission? At the October and April meetings, members reviewed the processes for developing budgets and preparing the Annual Report, respectively.

In December, the group reviewed information from a workshop on Volunteer Management and brainstormed phrases to use when recruiting volunteers and committee members. A key fact from the Volunteer Management summary is that, according to a Pew Research study, 41.6% of volunteers came forward in response to a general call, while 41.2% had been *personally invited* to participate.

Committee recruitment was a main topic in December and February, with the group deciding that to recruit members for our committees, instead of holding one big (and crowded) Committee Fair, we do a series of several mini-fairs, with two or three committees having tables in the Social Hall after service one or two Sundays each month, starting in February. This “rolling committee fair” was begun in February and March but discontinued when the COVID-19 emergency closed the building.

In April (meeting by Zoom), the Program Council discussed holding committee meetings using the Zoom platform. Committee succession was also on the agenda. Typically, terms of office in the Fellowship (most notably the Board) turn over on June 1, so April-May is a good time to determine who will be committee chairs for the next year. (Committee chairs are appointed or confirmed by the Board.)

### **Recommendations for Next Program Year**

A bi-monthly meeting schedule seems appropriate for communication across committees and for discussions of common issues. Recruitment of committee members seems to be an on-going issue.

Report Submitted by Peg Wherry

# Safety Task Force

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## Task Force Members

- Joy LaClaire
- Ita Killeen
- Rev Duffy Peet – Ex-Officio
- Beth Witte – Ex-Officio (CRE)

The Safety Task Force met 4 times since March 2019.

## Activities/Accomplishments

- March 2019: Advised Sunday Service Committee to make a change from “Hand of Friendship” to “Greet Your Neighbor” to minimize transmission of potential pathogens during influenza season and to respect the safety of individuals with compromised immunity throughout the year.
- Reviewed options for security cameras and intercom and discussed these with Board Members and Building Committee members.
- Developed a Weapons Policy for the UUFB that was approved by the UUFB Board June 2019.
- Wording was proposed for a small card that could be used by Greeters or other member to give to an individual stating the policy.

November 2019 several safety hazards were identified by Task Force member, Joy La Claire:

- The large bookcase in the RE classroom was not secured to the wall. It has since been removed.
- A smaller bookcase in the RE Classroom needs to be secured to the wall.
- A sinkhole at the NE corner of the property was reported to the city and filled promptly by city crews.

In January 2020, guidelines were obtained from the Gallatin City & County Health Department on washing toys and kitchen/building hygiene. This information was shared with and acted on by LRE staff and Building Committee members. Signage was placed in the kitchens and bathrooms to encourage hand washing and kitchen hygiene.

Throughout the year, the Task Force has had ongoing discussions of the best way to introduce Safety Training for Disruptive Intruders to the congregation. The Task Force is considering ways to recruit and train a Safety Response team. The Task Force hopes to sponsor a safety workshop in the future.

- An annual emergency evacuation drill was conducted October 19th by Rev Duffy.
- A member of the Hospitality and Membership Committee (Susan Backer) met with the Task Force to discuss appropriate safety training for Greeters in January of 2020. She was given a UUA handout on Safety & Security Instructions for Ushers and Greeters.  
<https://www.uua.org/safe/handbook/covenant/training-ushers-and-greeters> .
- Joy LaClaire attended an Interfaith FEMA workshop at Pilgrim UCC on March 12, 2020 to obtain ideas and resources for congregation safety.
- We heard from Beth Witte, CRE about the new company to be used for Background Checks for UUFB employees and volunteers who work with children.

**Recommendations for Next Program Year**

- Ongoing consultation with the Board, as needed, for safety as we emerge from COVID-19 quarantine.
- Recommend conducting Safety Training which focuses on how to respond to Disruptive Intruder.
- Recruit and train a Safety Response Team.
- Consider creating a policy for sexual offenders.
- Recruit additional members for the Task Force.
- Consult with congregational efforts to create/adopt an Emergency Preparedness Plan.

Report submitted by Ita Killeen

## Social Activities

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### Men's Group

#### **Coordinator**

- Jack Day

#### **Mission**

Develop a camaraderie among male members of the Fellowship and discuss topics that are important to the members. Share desserts, snacks, and something to drink in a relaxed atmosphere.

#### **Activities/Accomplishments**

We pass the hat for donations that will (hopefully) go toward upkeep of the kitchen which came to approximately \$200 this past year.

#### **Recommendations for Next Program Year**

Encourage greater attendance among members, especially younger members.

#### **Relevant Numbers**

Average attendance at meetings has been about a dozen.

Report Submitted by Jack Day

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### Women's Group

#### **Coordinator**

- Shared coordination by month

#### **Mission**

Develop a camaraderie among female members of the Fellowship and provide a social time while sharing dinner. Discuss a variety of topics of interest to the group participants. Contribute items to the monthly potluck dinner.

#### **Activities/ Accomplishments**

The two principle activities were to get to know other women in the congregation and to discuss a topic each month either in a large group or in small groups.

#### **Recommendations for Next Program Year**

Continue to provide a place where women in the congregation can get to know each other on a more personal level. Continue to explore a variety of programs that meet the desires of the participants. Explore whether to continue the potluck dinner or whether to change to an alternative. Look for ways to involve younger women in the congregation.

#### **Relevant numbers**

Attendance ranged from six to 22 individuals. Average attendance was 15.

Report submitted by Beth D'Atri

# Social Justice Action Committee

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## Committee Members

- Jesse Eide & Rev. Duffy Peet – Co-Chairs
- Barbara Tylka
- Cathy Cooper
- Larry Carucci
- Janet Lewis
- Bill Goold
- Kitty Donich
- Amanda Cater
- Randy Babbitt

## Committee's Mission

To provide the congregation with opportunities for education, advocacy, and witness on issues that relate to our values, and mission and to decide which groups should receive our special offerings from the Second and Fifth Sundays during the year.

## Accomplishments

- At our initiative, the Board agreed that UUFB would support a grant proposal to a UUA fund from Mountain Shadow for a Restorative Justice project on the Crow Reservation. We drafted a letter of support from the Board and learned that a \$15,000 grant—the maximum available--was approved.
- We recommended to the Board to have a flag in front of our building in support of the LGBTQ community. With Board approval of a \$700 expenditure, we explored options for installing a flagpole in front of our building. Jim Dolan agreed to give us a design and cost estimate for the flagpole.
- In October and continuing into March, we held extensive discussions of structure, charge, and leadership of the SJAC, including UUFB's on-going commitments to Family Promise, Fork and Spoon and the Food Bank. In April, we approved a new charge to go to the UUFB Board for approval and discussed the need for committee leadership.
- We sponsored two films: *From Paris to Pittsburgh* (environment) and *Undeterred* (border issues) and supported congregational participation in the Women's March on January 18. We began discussion on leading a Sunday Service by SJAC for March 29, but it was cancelled due to the COVID-19 virus.
- We continued to identify organizations to receive our Second and Fifth Sunday special offerings. Special Offerings for 2019 totaled \$14,125.88.

## Recommendations for Next Program Year

- 1) Leadership issues need to be resolved to provide continuity for the committee.
- 2) Continue choosing groups to receive special offerings.
- 3) Get input from congregation on social justice issues they want to work on and establish plan for providing opportunities per our charge.
- 4) Recruit leadership for our committed projects - Family Promise, Fork & Spoon, and the Food Bank.

Report submitted by Amanda Cater, Secretary of SJAC

## Fork & Spoon Volunteer Coordination Committee

### **Committee Members**

- Randy Babbitt – Chair/Coordinator
- Volunteers - 28 UUFB members and friends

### **Short Narrative**

Fork & Spoon is an HRDC program that provides a dinner service restaurant Sunday through Friday from 5-7 p.m. with a classically trained chef. It is a pay-what-you-can meal deal. The atmosphere is very much like a restaurant with a welcoming host who takes dinner orders, table service, dish busing, and full kitchen staff, all catering to the dinner guests. The Power of We (UUFB, Pilgrim Congregational, and Temple Beth Shalom) provides volunteers once a month on the fourth Thursday. Typically, three to four UUFB volunteers join three to four volunteers each from Pilgrim Congregational and Beth Shalom to make up the 10-11 volunteers needed for a dinner service. Volunteering is a tiring, but enjoyable service.

### **Committee's Mission**

- 1) Coordinate UUFB's contribution of three to four volunteers to the Power of We team each month.
- 2) Lead the coordination of the Power of We Fork & Spoon volunteers, making sure we have 10-11 volunteers total serving from the three congregations.

### **Activities**

- UUFB leads the "Power of We" volunteer group for Fork & Spoon.
- Coordinators at UUFB, Pilgrim Congregational, and Beth Shalom solicit and coordinate volunteers for the fourth Thursday every month. Randy makes sure we have enough volunteers from the Power of We and reports the numbers each month to the Power of We and the HRDC Fork & Spoon coordinator.
- Monthly UUFB coordination: Typically, three to four UUFB members volunteer to serve each month. Christy is a big help by putting up a sign-up list each month and sending Randy the results.
- Provide information through announcements to UUFB to solicit volunteers and make sure volunteers know what they should expect and what to do when volunteering.

### **Accomplishments**

- Every dinner service was successful, with the full complement of volunteers for each dinner service.

### **Recommendations for Next Program Year**

Lately it has been relatively easy to get the full number of UUFB volunteers each month with the printed Order of Service announcements and the sign-up sheet.

### **Relevant numbers:**

- *Number of events:* 10 events, May 2019 to Feb 2020 (Fork & Spoon was only doing take-out March and April 2020 due to COVID-19 and did not want volunteers to help with that service.)
- *Number of Volunteers:* The 28 different UUFB individuals (many serving more than once) provided 48 servers for 10 Fork & Spoon events, just a little less than half the 108 servers for all the Power of We.
- *Individuals served:* Fork & Spoon averages about 100 meals each night. UUFB volunteers thus helped served over 1,000 meals this past year.

Report Submitted by Randy Babbitt





## Family Promise of Gallatin Valley

### **Volunteer Coordinator for UUFB**

- Tonya Stevens
- Volunteers are recruited, as needed, for each hosting opportunity

### **Mission**

Family Promise of Gallatin Valley in Montana is a non-profit organization working with diverse faith organizations helping Gallatin Valley's homeless families with children. UUFB partners with St. James Episcopal Church at their Rectory providing volunteers to supply meals and serve as monitors and companions in the evening and overnight approximately five weeks each year.

### **Activities/Accomplishments**

- The fundraising event Cardboard Box City took place in October 2019; UUFB youth participated. (See more details in the Youth Group section elsewhere in this report.)
- UUFB co-hosted with St. James Episcopal, as usual, during weeks of November and December of 2019 and February 2020.
- In March 2020, the program protocol was changed as a result of the COVID-19 pandemic and subsequent statewide Stay-At-Home directive. St. James offered the use of their Rectory for all churches in the program so host families could remain in one place. Other changes made to minimize risk: dropping evening hosts from the schedule, volunteers leaving evening meals at the front door without entering the building, and only one overnight host each night (instead of two), since St. James again has a sexton living in the building. For March 26-28, following new protocol, Tonya Stevens delivered meals that were picked up from establishments providing carry-out and was the only host for three nights running.
- The Family Promise organization itself underwent major staff changes in 2019 and 2020. The Director, Volunteer Coordinator, and Case Worker positions were all vacated and refilled.
- Family Promise's main fundraising activity, "Celebrity Servers," was cancelled due to the COVID-19 pandemic. They continue to need volunteers, funds, and donated items: apartments, cars, furniture, etc.

### **Relevant numbers**

Our volunteer force is shrinking. For three weeks of hosting, we had 11 different meal providers and only 17 different evening and overnight hosts, most of them repeating their services.

### **Recommendations for Next Program Year**

1. Add a co-coordinator to help with UUFB volunteer wrangling.
2. Continue to step up recruitment of trained volunteers from our congregation.
3. Post to various UUFB media *all* events and activities pertaining to Family Promise.
4. Organize a one-time UUFB group to help with an activity at the Day Center.

Report Submitted by Tonya Stevens, Volunteer Coordinator

## Gallatin Valley Food Bank Collection

### **Coordinator**

- Norm Eggert

### **Mission**

To organize a collection of non-perishable food and personal items for the Gallatin Valley Food Bank from the members and friends of UUFB. The collection is on the third Sunday of each month.

Report Submitted by Norm Eggert

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## Glass Recycling (Environmental Task Force)

### **Volunteers**

- Carolyn Widman
- Richard Noonan
- Janet Lewis
- Barbara Lantz
- Robyn Lauster
- Adria Brandvold
- Neil Schwarzwald
- Bill Goold

As part of the Social Justice Committee, the Environmental Task Force started a monthly glass recycling in March 2019 on the fourth Sunday of each month. For the period covered by this Annual Report, the amount of glass recycled was 2,300 pounds, not counting certain beer bottles that are recycled for free. The largest month's collection was 537 pounds in August 2019.

The cost to recycle this year's glass was \$245.50, which was easily covered by donations. Donated cash on hand is \$243.75. Some of the donations this year were used to purchase stackable plastic bins. The excess donations are available to the Environmental Task Force for future projects.

The glass recycling program is currently on hold due to the COVID-19 virus. The recycler has been closed and concerns about how to mitigate the risk of infection from the glass needs to be addressed. Once Recycle Montana opens in late May, we will let the Fellowship know how they can recycle on their own until the program resumes.

We take the glass collected at UUFB to We Recycle Montana in Four Corners to be crushed into bits in preparation for transport to Salt Lake City. The company reports that the crushed glass is currently recycled in manufacturing fiberglass, for use in sandblasting, and as an ingredient in concrete and tile. Recycled glass is also used as an ingredient in countertops, filtration systems, AstroTurf and last but not least, making new glass containers.

## Sunday Services Committee

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### **Committee Members**

- Janet Young - Chair
- Sandra Oldendorf
- Bruce Swarny
- Lisa Trankley
- Carolyn Widman
- Kathryn Hohmann
- Deanna Dean
- Jorie Hanson
- Carol Stahl
- Rev. Duffy Peet – Ex-Officio

### **Short Narrative**

We began the year with the Flower Celebration followed by services which touched on most of the values we hold dear, with a variety of out-of-UUFB speakers, when Rev. Duffy was not leading the services.

We addressed long-standing issues within the services, including how to best integrate Joys and Concerns into our services, changes in the Hand of Friendship tradition, and other changes that reflect a continuing transition from a "family style" Fellowship to a "pastoral model."

### **Mission**

We work with the Minister to create Sunday Services that are inspiring, informative, and stimulating and in keeping with the principals of UUA and the mission of UUFB.

### **Activities**

We met each month, or as needed recently, to adjust to fast moving changes in Sunday services due to COVID-19. We kept records of decisions, interfaced with other key committees and the Board. We held a Lay Leader team building event and participated in outreach within the Fellowship to increase our volunteer base.

### **Accomplishments**

- We were able to build our team of Lay Leaders who have the training, resources and template for a service that works smoothly. We transitioned to Google Docs to maintain a standard script template for building a weekly service and a common spreadsheet to facilitate tracking and scheduling future service topics, speakers, lay leaders and technical assistants. Lay leaders have committed to three to four services per year each, and that has helped to fill the schedule further into the future. The Lay Leader Team participated in a training event to bring new lay leaders up to speed on how to successfully operate the new Fellowship audio and visual improvements. We have added a technical assistant to each service, when requested, to help the lay leader with the preparation and set up of the Sanctuary before each service.
- In order to have more service content resources on hand, the Committee purchased a Soul Matters subscription from the UUA that includes readings and stories, questions for reflection and practice, and links to talks, movies, books or other related materials for inspiration on a monthly theme.

- In a decision that seems prescient now that our Fellowship is dealing with a global outbreak of an infectious disease, we changed our custom of exchanging the "hand of friendship" to "greeting our neighbor." This move has helped us safeguard the health of our Fellowship, respect interpersonal distances, and was well accepted by all.
- We addressed and improved the Joys and Concerns section of the service, offering members the chance to simply place a stone in a water-filled bowl and return to their seats. This allows members a choice on whether to make an announcement of their Joy or Concern or maintain their privacy. This change has been appreciated by members and well accepted.
- We have made a focused effort to integrate more music into our services, working closely with other committees and our pianists. We supported the hiring of the new Music Coordinator, Laurel Yost.
- We have offered a streamlined and disciplined approach to announcements during services. This ensures that our services are timely and spiritually focused, thus more inspiring.
- We began to discuss the impacts of hosting two services on Sundays, to include the number of lay leaders, committee members, and re-numeration for guest speakers and music for multiple services. Increased attendance at services requires that we begin to address how to safely hold Sunday services within the city-approved maximum occupancy of the Fellowship building.

### **Numbers**

- 48 Lay Leaders
- 10 committee members (8 active)
- 24 Services lead by Rev Duffy
- 10 Outside guest speakers
- 10 Lay lead services (without Rev Duffy)
- 6 Outside musical performances

Submitted by Sunday Services Committee