

*Unitarian Universalist  
Church in Meriden*



*Annual Report  
Fiscal Year  
2020 – 2021*

328 Paddock Avenue  
Meriden, CT 06450-6985  
203-237-9297  
[www.uumeriden.org](http://www.uumeriden.org)

*Index*

		<u>Page</u>
Call to Annual Meeting, 2021	Paula Snedeker	3
2020 Annual Meeting Minutes	Paula Snedeker	4-5
2020 Special Congregational Meeting Minutes	Paula Snedeker	6-8
Minister	Rev. Tony Lorenzen	10
President	Jane Dioguardi	9
Pastoral Care Team Annual Report	Kathleen Lindberg	16
Social Justice	Steve Volpini	16
Appendix: FY '20 Treasurer's Report	Trish Schneider	18
FY 2021-22 Projected Budget	Trish Schneider	

**Unitarian Universalist Church in Meriden**

Rev. Tony Lorenzen, Minister  
508-344-3668 /revtonyuu@gmail.com

June 4, 2021

Dear Members of UUCM,

The Annual Meeting of the Unitarian Universalist Church in Meriden is hereby called for Saturday, June 19, 2021 at 1:00 PM IN PERSON at the church, or join via Zoom:

<https://us02web.zoom.us/j/3082073466?pwd=bXVSejViaUwydXhzRjlzOGFseEoyQT09>

Meeting ID: 308 207 3466

Password: 202122

Or dial in via phone:

+1 646 558 8656 US (New York)

Items on the agenda include the following:

Minutes of June 20, 2020 – Annual Meeting

Minutes of October 25, 2020 – Special Congregational Meeting

Treasurer's Report – Fiscal Year 2019 – 2020

Budget for July 2021 – June 2022

Election of officers

Annual Report – Fiscal Year 2020 - 2021

Any other business that shall come before the meeting

Members of at least 30 days by June 19, 2021 are eligible to vote. Please plan to attend this important meeting.

Yours truly,



Paula A. Snedeker, Clerk, UUCM Board of Trustees

328 Paddock Avenue • Meriden, CT 06450-6985  
(203) 237-9297 | [office@uumeriden.org](mailto:office@uumeriden.org)  
[www.uumeriden.org](http://www.uumeriden.org)

**Unitarian Universalist Church in Meriden  
2020 Annual Congregational Meeting  
Saturday, June 20, 2020  
1:00 PM via Zoom**

**Call to Order**

Meeting was called to order at 1:05 PM by Jane Dioguardi, Board of Trustees President. Jane lit the chalice and read the Seven Principles of Unitarian Universalism.

A quorum of 17 members was present.

BOT Members present:

Jane Dioguardi, President  
Trish Schneider, Treasurer  
Paula Snedeker, Clerk

John Sepples, Vice President  
Sandy Duffy, Finance Chair  
Kathleen Lindberg, member-at-large

**Minutes of June 9, 2019 – Annual Meeting**

John Sepples made a motion to accept the minutes of June 9, 2019, and Steve Volpini seconded. The motion passed unanimously.

**Minutes of December 15, 2019 – Special Congregational Meeting**

Sandy Duffy made a motion to accept the minutes of December 15, 2019, and Donna Stimpson seconded. The motion passed unanimously

**Treasurer's Report – Fiscal Year 2018 – 2019**

Paula Snedeker made a motion to accept the Treasurer's Report, and Angelique Henderson seconded. The motion passed unanimously

**Budget for July 2020 – December 2020**

The budget was not sent out with the Annual Report because terms of the Paycheck Protection Program were changed by Congress, and Trish is working out the details. With PPP loan forgiveness, the loan will become a grant of \$10,200. Originally scheduled to last for eight weeks, it has been extended to 20 weeks.

The budget shows a deficit that we may be able close thanks to the PPP loan. Income rental has been removed while fundraising has been increased. Online auction should do well as people outside the congregation will be included, and Rev. Tony is planning a series of virtual concerts. Tag sale will be in July; Donna will be picking up donations and will need help sorting. On the expense side, child care and member class expenses have been eliminated. Administrative assistant position will be kept for duration of PPP.

John Sepples made a motion to accept the budget, and Kathleen Lindberg seconded. The motion passed with one abstention.

**Election of officers – postponement until Special Congregational Meeting in October (date TBD)**

UUCM Annual Report; 06-17-2021

The Board of Trustees made a decision to postpone the election due to major challenges caused by the pandemic. The only position up for reelection is Treasurer, and Trish Schneider has offered to continue in the role until the special meeting. Two at-large positions are also open due to resignations during the year. Trish noted that there is an opening for an assistant treasurer, as noted in our bylaws.

Donna Stimpson made a motion to approve current board officers continuing in positions until the fall meeting, and Richard Gault seconded. The motion passed unanimously.

### **Annual Report – Fiscal Year 2019 – 2020**

Steven Nahas requested discussion on fundraising, as that topic was not included in the report.

The FUNdraising Team had a goal of raising \$12,000 and raised approximately \$5,270. With the pandemic closing the church in March 2020 until further notice, a number of fundraisers were put on hold, and we lost all ongoing and miscellaneous rental revenue.

A Book and Bake Sale raised \$357, and the Holiday Fair raised \$4,471 (35% more than estimated). The May 2020 Tag Sale was postponed to July 2020 and will be held outside in the parking lot. The Annual Service and Item Auction was also postponed. Virtual auction options are being investigated. The Stop and Shop Cash for Causes fundraiser is continuing and has raised \$430 during this year. Nancy Burton made a motion to accept the Annual Report as submitted, and Steven Nahas seconded. The motion passed unanimously.

### **State of CT Certificate of Incorporation of Existing Religious Society**

Once we are recognized as a religious body, we can file with the federal government as an individual tax-exempt organization. While we are already exempt because we are a church, we will be able to identify as a 501(c)(3) charitable organization, which the UUA highly recommends as a best practice. In response to Angelique Henderson's concerns about politics, Jeff May noted that we cannot advocate for a candidate for office or for a political party; we can work on issues, such as helping people register to vote. Rev. Tony clarified that as a religious nonprofit, we can do any amount of issue or legislative activity we want as long as it's not 85% or more of our total body of work.

Nancy Burton made a motion to file the form with a \$50 fee, and Angelique Henderson seconded. The motion passed unanimously.

### **Adjournment**

Donna Stimpson made a motion to adjourn, and Nancy Burton seconded. Motion passed unanimously. Meeting was adjourned at 1:58 PM.

Respectfully submitted,  
Paula A. Snedeker  
Clerk, UU Meriden Board of Trustees

**Unitarian Universalist Church in Meriden**  
**Special Congregational Meeting Minutes**  
**Sunday, October 25, 2020**  
**12:30 PM via Zoom**

**I. Call to Order**

Meeting was called to order at 12:30 PM by Jane Dioguardi, Board of Trustees President.

A quorum of 17 members was present.

**II. Reading of the Covenant and Mission of the Congregation**

Jane read the UUCM covenant and mission.

**III. Bylaws Changes**

The following suggested amendments to the Bylaws of the Unitarian Universalist Church in Meriden were discussed:

**ARTICLE IV – MEMBERSHIP**

§2. The right to vote at any meeting shall be limited to active members eighteen years of age and older, but any member may speak at any meeting. **New members shall not have the right to vote until thirty days after their effective date of membership. In matters involving the sale of Real Estate or a purchase requiring a withdrawal of invested funds in excess of 10 percent of the value of the total invested funds of the church, the right to vote shall be limited to those individuals who have been members for a minimum of two years.** Approval of such transactions shall require a two-thirds vote of the members present qualified to vote.

*Suggested amendment: Removal of these limitations to the voting rights of new members. Members should have the right to vote in any congregational meeting.*

DISCUSSION: Nancy Burton and Jeff May objected to the removal of these limitations because it could allow newcomers to have a significant influence. Rev. Tony pointed out that the stopgap should be in the membership process, i.e., there should be a waiting period to become a member and sign the membership book. Question arose re: what kind of waiting period might dissuade people from joining? Anita Sanders asked us to take into consideration the case of a potential new member who has already been highly involved in a prior congregation. Nancy Burton said that a two-year restriction in major financial decisions is too long; Richard Gault shared that he felt one year is plenty. Trish Schneider commented that the membership program needs to be really deliberate – “big money” questions do come up, but we need to see someone’s commitment before they sign the book. Peg Kirkpatrick said that we can’t address the issue until we know what the bylaws say about becoming a new member, and we need to document the membership process. Discussion then revealed that the membership process is not part of the bylaws, so we need to address that and add real objectives to the bylaws. Also, a quorum now is 15 members, but should it be a percentage of membership? After discussion, Jeff May made a motion to amend the bylaws to remove the limitations to the voting rights of new members, and Sandy Duffy seconded. After John Sepples stated he agrees with better defining what it takes to be a member before loosening the restrictions, Jeff withdrew the motion and made a motion to table it, which Nancy Burton seconded.

## ARTICLE V – ADMINISTRATION

§1. The administration of the affairs of the Church shall be vested in the Board of Trustees which shall consist of the following officers: the President, the Vice President, the Clerk, the Treasurer, the Chairpersons of the Finance and Property Committees, and **three (3) Trustees-at-Large**.

**Suggested amendment:** Reducing the number of at-large Trustees to one.

DISCUSSION: Jeff May made a motion to amend the bylaws to decrease the number of at-large trustees from three to one, and Richard Gault seconded. Donna Stimpson noted that being an at-large member could be a way to get someone on the board as a step toward a higher level of leadership; Nancy Burton agreed. Trish Schneider suggested that a better way would be an effective leadership training program. Rev. Tony observed that the more people on the board, the fewer people we have to do other important things. The motion passed with a majority vote.

§7. Vacancies in any office, except for the Minister ~~or the Vice President~~, shall be filled until the expiration of the term by the Board. Should the office of the President become vacant, the office shall be assumed by the Vice President. ~~The office of the Vice President shall be filled by a vote of the congregation at a regular or special meeting to be called within two months of vacancy.~~

**Suggested amendment:** The vacancy of the Vice President's office shall be filled until the expiration of the term by the Board.

Jeff May made a motion to amend the bylaws to allow the board to fill the Vice President's position in case of vacancy, and Steve Volpini seconded. The motion passed with a majority vote.

## ARTICLE VI – DUTIES OF THE OFFICERS

§2. The Clerk shall give notice of all meetings of the Church and of the Board and shall keep an accurate record of the proceedings of said meetings, shall have custody of all books, papers and records pertaining to the administration of the Church except such as properly belong in the custody of other officers, shall keep a register especially provided for the purpose of recording the names of members of the Church, their dates of membership, dates of death or withdrawal together with a record of **baptisms** and such other records as the Church or Board may require, and shall maintain a record of all members who have previously served as members of the board.

**Suggested amendment:** Replace the term "baptisms" with "child dedications."

Jeff May made a motion to amend the bylaws by replacing the term "baptisms" with "child dedications," and Richard Gault seconded. The motion passed unanimously.

### IV. Election of Treasurer and Finance Chair

#### Nomination of Candidates

John Sepples nominated Trish Schneider for another two-year term, and Nancy Burton seconded the nomination. No other candidates came forward or were nominated. Members voted unanimously to reelect Trish as Treasurer.

No candidates came forward or were nominated for Finance Chair. Position will be vacant and the Board can appoint someone when said person is interested/available.

### V. Budget January 2021 – June 2021

First half of calendar year has a deficit of (\$3728.88) due to decrease in income, although fundraising is doing very well.

Jeff May made a motion to accept the budget and Richard Gault seconded. The motion passed unanimously.

**VI. Adjournment**

John Sepples made a motion to adjourn, and Richard Gault seconded. The motion passed unanimously.

Meeting was adjourned at 2:10 PM.

Respectfully submitted,  
Paula A. Snedeker  
Clerk, UU Meriden Board of Trustees



***Annual Report of the President  
Jane Dioguardi***

Dear Members and Friends of our Congregation,

As all of us know, we have faced unprecedented challenges this year, not all of them owing to COVID-19. Our congregation is aging, our membership has been diminishing slowly, and our income is not what we wish it was.

Despite ongoing engagement by many of our friends and members, we've reached a crisis: Our Annual Congregational Meeting is coming up on Saturday, June 19, at 1:00 PM (a hybrid meeting—you may attend in person or via Zoom), and we have received no nominees for these essential Board positions:

- President
- Vice President
- Clerk
- Finance Chair

These positions are vital to the running of UU Meriden. A President signs legal documents and submits important documents to the UUA, the VP serves as the President's backup, the Clerk communicates important matters to the congregation and serves as documentarian, and the Finance Chair keeps track of our income and reports it to the Board. The four individuals currently holding these positions (John Sepples, Paula Snedeker, Sandy Duffy, and I) have come to the end of their terms, and we thank them for their efforts. These four positions, along with that of the Treasurer (Trish Schneider, who has gone above and beyond the call of duty this year and every year) are absolutely critical to the survival of our existence as a congregation—and even if we pare down their duties in favor of a “town meeting” model, we absolutely need to fill these roles.

Failing this, what do we do now? Rev. Tony has made some suggestions:

- Officially band with another congregation, more deeply than we have with the Mattatuck UU Society, sharing a Board
- Become a satellite of a larger, thriving congregation

Our worst case scenario? Making peace with the idea of closing, which no one wants to do. There are, however, many bright spots in our past year:

- The ongoing work of the Social Justice Council. Even in the hardest of times, the SJC continues to reach out to the disenfranchised and those in the greatest need in our community and beyond.
- The Lay Pastoral Care Team. The members of this team have reached out to friends and members in crisis, helping take some of the burden off Rev. Tony's shoulders.
- The Worship Team. With their creativity and technical expertise, they have made thought-provoking and enjoyable on-line services available to everyone.
- The Property Team, who have gotten together to maintain the grounds and our building, handling repairs and making our Spiral Garden our crown jewel.
- The many people who came forward to run and support our fundraising initiatives: our very first on-line Holiday Sale and Auction, our on-line and live concerts, our tag sale, our 50-50 raffle, and others.

As I come to the end of my term as President and my six years on the Board, I will always be grateful to have spent this time in ongoing spiritual community with all of you.

In faith,  
Jane C. Dioguardi

***Annual Report of The Rev. Tony Lorenzen  
to the Unitarian Universalist Church in Meriden  
for the Program Year 2020-2021***

**INTRODUCTION**

After this introduction and opening remarks, this report has three main sections.

1. Section 1 is my self-evaluation on my own personal ministry goals for the year, along with a reflection on the UUCM Board's goals and the Congregation's goals.
2. Section 2 is a reflection on how an entire program year of pandemic quarantine influenced our congregational programming and our community.
3. Section 3 is a first draft of my personal goals for coming program year of 2021-2022 and my recommendations for Congregational Goals.
- 4.

**OPENING REMARKS**

It's been a difficult year being a minister. I love this congregation and you the members, but the reality is that this particular year in the congregation has been a struggle on a number of fronts. Being a contract minister, I am hired by the Board, and most of my work deals with the board and other leaders and not so much with the general membership. I do however lead and plan services, engage in social justice work in the community, and provide pastoral care, although I don't do nearly as much of any of these things as I would if I were a full-time, called minister, in a covenanted relationship with the congregation. This needs to be kept in mind in reading my report for I am more than anything a consultant to the congregational leadership that has hired me in conjunction with the leadership at the Mattatuck UU Society congregation (MUUS). I have just finished my second year with you, and one and a half years of that time has been during a world-wide pandemic, so that my ministry and what you need from it, has likely changed from what either UU Meriden or I thought it would be

**SECTION 1 – Self Evaluation and Congregational Evaluation.**

The Goals I set for myself for this program year of 2020-2021 were:

1. Help the Congregation Improve year-round fundraising and increase its donor base beyond its membership.
2. Expand the partnership with MUUS to include more congregation(s).
3. Increase the Congregation's focus on UU Identity.
4. Help the Congregation Identify, name, and formally approve a three-year plan.

**GOAL 1 - Fundraising**

**My stated goal was:** Establishing a donor database beyond our membership, moving away from a congregational understanding of pledges as the main source of income, establishing a narrative budget, and expanding year-round fund-raising. I will work to revise bylaws and policies that restrict fundraising initiative and fundraising for special needs or projects. I will work more closely with the finance and fund-raising team, establish a yearly cycle and program for fundraisers, establish a donor appreciation philosophy, set up a Faithify account, apply for UU Funding Program grants, and teach fundraising communication and strategies to the leaders.

**My self-evaluation**

No bylaw revision was done. I believe that due to my work with the leadership, the conversation about fundraising is indeed shifting, and more people understand the need to move to year-round fundraising and to move away from members and friends as the sole source of income, be it from pledges or spending on congregational fund-raisers. Both the Holiday Fair and Auction used Auctria and expanded the use of online fundraising. Faithify (please see Faithify.org – a "Go Fund Me" for Unitarian Universalist projects only) is ready

to use and our first projects will go online in June, one to raise money for an increased presence of technology in the sanctuary.

I met with the Finance Committee. Although I am not sure my presence had much of an impact one way or another, nor did I do any formal (there was informal) education for leadership around fundraising.

I feel progress was made, (Trish Schneider as Treasurer did work above and beyond the call as well as beyond the Treasurer's job description) but much more needs to be done. I hope to work more with Stewardship efforts in the coming year, and I wonder if the Finance Committee is a level of bureaucracy that is no longer needed.

I believe fundraising needs to be a continuing priority of my ministry and my time with you. We made start to raise money among non-members and online concerts and online auctions, raffle, and online holiday fair had moderate success in doing that. Most income still came from members in one way or another. We must expand our donor base to the surrounding community and the broader UU community. I would like to see UU Meriden develop a donor list in the way of a secular nonprofit in order to generate on-going income. I would like to see active outreach to community partners to attend and participate in fundraisers, especially something like an auction or a raffle. UU Meriden has enough community partners that can be solicited well within the bounds of respectful association.

UU Meriden will never again fund itself on membership yearly pledges alone. We must find a way to raise money outside the congregation on a year-round basis in ways that do not completely consume staff and volunteer time and energy.

I would like to see the congregation combine efforts with MUUS and possibly other congregations on large scale fundraisers such as a concert or a big dollar raffle. The money raised would be split between congregations, and each congregation's share will likely be more than having such a fundraiser as a sole congregation would have been.

## **GOAL 2 – My stated goal was to Expand the MUUS/UUCM Partnership**

### **My self-evaluation.**

The expansion hasn't happened, but conversations and meetings happened, and various ideas have been developed and explored with our leaders at MUUS and Meriden, other congregational leaders and even UUA national staff. I consider my progress on this successful.

I have floated this idea to members of both leadership teams. Jeff May and Paula Snedeker of UUCM agreed to be on such a joint committee, and John Cummings and Vivian Templeton of MUUS attended a meeting with me. I have reached out to ministers and lay leaders at Danbury, Stamford, Bridgeport, New Haven. The minister in Danbury said she would pass on info about meetings to lay leaders and encourage them to attend. The new interim minister in Stamford said he didn't know enough about the congregation yet to know if joining this discussion would be a good thing, but to keep him informed about what's going on. No one from Danbury participated in the first meeting, but we decided that we needed a preliminary name and solid mission/mission statement for a congregational collaborative/cooperative, and we needed some basic info on incorporating such a group as a nonprofit. I am working on mission, and Vivian Templeton on the legal information. We postponed a second meeting in December due to holidays and lack of progress. We will meet again in late January or in February. Invitations will include the CT congregations already mentioned, as well as UU Meeting of South Berkshire, Housatonic, MA and the Fourth UU Congregation of Westchester County, NY, Mohegan Lake, NY. The goal for the end of the year is to have any other interested congregations on board with a name chosen, mission, and legal paperwork underway.

As the program year hurtled toward spring, this meeting and GA, it was evident follow-up meetings would not happen this year. This year during ministerial search, for the first time ever, the UUA transitions (ministerial placement) office posted two things never posted before – an item about Congregations seeking another congregation with which to partner to offer a half-time or full-time position, as well as congregations seeking ministers to fill such as position. After seeing this posted, I contacted the UUA and had a short discussion with Keith Kron, and he thought some of the smaller congregations in CT such as Danbury, Stamford, and maybe even Madison might be interested in at least talking about joining our partnership or talking about a cooperative

of some kind. I had a long discussion on the phone with Jan Gartner in the UUA's office of staff finance to talk about how sharing staff would work on a cooperative or multi-congregation (more than two) platform. We didn't arrive at any answers, but we here at MUUS and Meriden have started an important conversation. I have spoken to leaders at the Danbury congregation, and although nothing was finalized, the conversation has been started.

I hope that in the coming year we will be involved in more in-depth conversations with representatives of other congregations about HOW smaller congregations can work together, either through sharing staff, forming a cluster that works together, sharing resources, forming a cooperative or any/all of these in combination.

**Goal 3 - My stated goal was to: Increase UU Identity** with more robust adult faith formation, more attention to families with children, and a visitor to member to leader program heavy on UU basics and UU identity.

#### **My self-evaluation on Increase UU Identity**

I believe there was great progress made here even if it is not where I'd hoped to be, but pandemic and online programming hampered efforts.

I was able to add UU Meriden-specific material to our new member welcoming program. And we have had one new member join during the pandemic. I have made efforts to include important UU history and theology in services throughout the year.

There were some bright spots in terms of UU Identity this year. I was incredibly pleased with the participation in Beloved Conversations anti-racism course offered by the UUA/Fahs Collaborative. I was incredibly impressed with the Social Justice Council's work in helping our undocumented neighbors. We have our new UU/new member material as a self-study course on both congregations' websites. Although I am sure it exists, I have received no comments (not one, nada, zip, zilch) that Sunday services are too (fill in the blank) \_\_\_\_\_ [Christian, lacking in spirituality, atheist, pagan, Buddhist, etc.] but have noted continuing encouragement to hear a variety of voices both internal and external. I have received a handful of comments about how helpful the Six Sources video by Jeff May is in explaining the sources of our religion. People have asked for more of this, such as a Seven Principles video, too. I made a video at Christmas highlighting Unitarian and Universalist involvement in the modern celebration and customs of the holiday.

I had hoped to do a leadership development class for new leaders this year. That didn't happen, but I fully expect to do this in the coming year.

#### **Goal 4 - Develop a Three-Year Plan**

The Development Team will modify into a Committee on Ministry, and that team will help us create a three-year plan. Part of this will be deciding what to do to make sure our building is meeting our needs.

#### **My self-evaluation on The Three-Year Plan**

There has been no formal work done on this yet, but I think it is time to make it a focus in each congregation once again. It is time to pick up our Development Teams' work where we left off last year just as the pandemic hit. We were at the point of choosing priorities for a three-year plan. As public health restrictions eased this spring, we ended our rental at First Congregational Church and began to look for a more permanent location, we began making plans for more in person services,

The most pressing question for the UU Church in Meriden as this year ends is how to reimagine the congregation for the future so that there is a future for the congregation.

### **SECTION 2 – The Pandemic Quarantine and Congregational Life**

The pandemic quarantine has had deep and lasting impact on congregational life. Most obvious is that Sunday services, meetings, classes, and other programs needed to happen online, mostly through Facebook Live and Zoom. The auction moved online as well. All in all, MUUS along with Meriden, did a fantastic job of refiguring our services to work online. Our attendance was outstanding, as good, or better than our in-person attendance during my first 6 months with you. Overall, most teams, committees, and other working groups did a good job

moving online. Adult faith formation trailed off, although my book group and other opportunities had good regular participants, and my Bible for Liberals Class had a good handful of participants, the opportunities for adults lagged. Online Sunday services took much, much more of my time to prepare than do in person services.

Pastoral care was much more difficult. I had to stop visiting people in person between December and March. I picked up visiting in person this spring and made many visits. Many people have had difficulty during the past year, not only with health issues, but with mental health issues. Not only depression, but other non-clinical depression, lethargy, and loneliness impacted many people. During April and May, I have met for many hours with people barely hanging in there.

The pandemic hit the UU Church in Meriden quite hard. We had more than our share of members who could not or would not engage the congregation via the internet. We also had more than our fair share of members who were affected emotionally to a debilitating degree. We lost touch with many people because of these two things.

Efforts to have members help each other by increasing their connection and contact through phone calls and pen pals were not widely successful, although some people did take part and some circles of friends kept up connection with each other. There was not, however, a sustained or successful effort to engage the membership on a congregational scale in Sunday services, education, fund raising, or special events and projects.

There were times when even the UU Church in Meriden's Board had trouble organizing itself and accomplishing things.

Because I am only part-time, I could never find enough hours to bolster the leadership or reach out to members. This wasn't as much of an issue at MUUS, as leaders there stepped up their game and in general the membership chipped in to get things done as needed.

Because of our pandemic struggles, the congregation finds itself currently unable to find enough board members to fill a board for next year. Trish Schneider will return one more year as Treasurer and Randy Heath will remain on the board, but everyone else is stepping down either because of term limits due to your Bylaws or due to personal circumstances.

### **Section 3 – Goals for 2021-2022**

This section is a first draft of my personal goals for coming program year of 2021-2022 and my recommendations for Congregational Goals. I will finalize my goals for the year in August. I hope that by the time the congregation kicks into programming in the fall, the board will have clearly articulated and communicated to the congregation its goals for itself as a board and the congregation (these may be the same or slightly different).

#### **My Personal Goals as a Minister**

1. Re/Establish Personal Relationships with the membership.
2. Become more involved in the local community.
3. Develop hybrid in-person/online Sunday service and educational programming.
4. Cultivate an abundance mindset in the congregation and improve fund-raising skills.
5. Guide an organizational restructuring that develops a way forward for the congregation as it faces the need to find more leaders and to maximize volunteer hours.

**Personal Goal 1 - Re/Establish Personal Relationships with the membership.** Develop ways to pastorally reach the entire membership from children to our oldest members, from those who are involved to those on the periphery, and from the newest members to those who have been around the longest. I will re-issue my invitation to meet with everyone in the congregation in August. In many ways the start of this program year is very much my first year just coming into the congregation. The pandemic has changed congregational dynamics as well as everyone's life, and many people will be rethinking their relationship to the congregation (for some this will be a positive development and for others a more difficult or even a negative development for various reasons). I hope that the board will encourage everyone/every household to take me up on the invitation.

When I invited people two years ago, I met with most of the members and I hope these meetings renew connection.

**Personal Goal 2 - Become more involved in the local community.** The Meriden clergy group met less frequently, even virtually, during the pandemic. I will seek ways to do this that fit into time and schedule constraints and maximize my impact.

**Personal Goal 3 - Develop hybrid in-person/online Sunday service and educational programming.**

To serve every member of the congregation and the community most effectively, we need to have a robust presence online after we return to meeting in person for services, committee meetings, fundraisers, and socializing. I will seek ways to maximize effectiveness of having both in-person and online programming with the resources, volunteers, budget, and time available.

**Personal Goal 4 - Cultivate an abundance mindset in the congregation and improve fundraising skills.** I will continue my education on how to do effective non-profit and religious fund raising. I will be more involved in fund raising efforts. I plan to offer opportunities both in Sunday service and in other programming to talk about money, attitudes about money, philosophies of money and finance apart from fund raising and stewardship to begin to shift the congregation to an abundance mindset. Implementing narrative budgeting, missional budgeting, and year-round fundraising will be part of this effort.

**Personal Goal 5 - Guide an organizational restructuring that develops a way forward for the congregation as it faces the need to find more leaders and to maximize volunteer hours.**

The congregation is currently exploring a monthly congregational town meeting system to help leaders that do come forward manage daily/weekly/monthly tasks and congregational needs. A number of leaders have stepped forward to help organize these meetings and I think this system will benefit the congregation. The congregation needs to find two leaders that serve with the Treasurer, Trish Schneider and Randy Heath on an executive team. During the year I will put forward recommendations for the future of the congregation.

### **My Recommendations for Board/Congregational Goals**

1. Organizational Restructuring.
2. Explore Long-Term Possibilities for Continued Vitality.
3. Develop an Abundance mindset.

**Congregational Goal 1. Organizational Restructuring –** The Congregation needs to reduce the size of its Board. Right now we can't find four people to be on the board, never mind seven. This bylaw change is a must ASAP. The congregation needs to eliminate some committees and consolidate others.

Here are my recommendations:

- Eliminate Finance Committee
- Eliminate Communications Committee
- Fundraising Committee
- Eliminate Membership Committee
- Eliminate Buildings & Grounds Committee(s)

ALL THESE THINGS BECOME EXEC BOARD DUTIES until such time as congregation grows enough to justify their return.

And

- Eliminate RE Com
- Eliminate Membership Com
- Eliminate Pastoral Care Com

ALL THESE THINGS BECOME Committee on Ministry/Minister DUTIES until such time as congregation grows enough to justify their return.

The Worship Associates and the Social Justice Council have enough work to do and enough involvement to keep them running as they are.

This is the most difficult part of this year's report. Please read and think about this soberly. Don't panic and don't over-react. Nothing is imminent, but by this time next year, it will be.

The UU Church in Meriden must either

Make plans to shut down the congregation

OR

Rearrange organizational structure and leadership duties and carry on making necessary bylaw and procedure revisions as well as revised job descriptions, hopeful that post-pandemic church life will inspire involvement and energy, and we can revisit things next spring.

If the congregation forges onward, these two things are necessary:

1. Help Rev. Tony and MUUS find more partners to join the collaboration we've begun.
2. Begin conversations with a large congregation about becoming a satellite campus - allows congregational life to continue and moves much of the administration (which no one seems to want to do) to the larger congregation.

**Congregational Goal 3 - Develop an Abundance mindset** – I think the congregation needs to find time to talk about money, attitudes about money, and other financial matters in ways that are not part of our budget and stewardship conversations so that we can explore with less anxiety our attitudes and whether they are serving us well in terms of long-term financial health and mission effectiveness. It is a given we need to do year-round fundraising that adds substantially to our income. We have begun this fund-raising improvement, but we need to step it up and organize it so that it doesn't monopolize time and energy, but still generates enough income.

***Pastoral Care Team Annual Report***  
***Kathleen Lindberg***

The Pastoral Care Team was busy this past year, assisting church members as we all coped with COVID, Many cards were mailed. Nursing home visits were made when permitted. Meals were delivered to homes, phone calls were made, and e-mails were sent. Rides to doctor appointments were made as well as home visits. Lunch dates were made and enjoyed. Financial assistance was provided as well as information on community resources. It was rewarding to be able to help our church family...Kathleen Lindberg

**Annual Report of the Social Justice Council**  
**Steve Volpini**

Despite the pandemic, the Social Justice Council has continued meeting--on Zoom. We have had a busy year on several fronts.

**Anti-Racism**

Last spring, before most of us had stopped attending large gatherings, we participated in two Black Lives Matter rallies in downtown Meriden in response to George Floyd's murder. One rally was sponsored by the City, a larger one by young activists.

Beloved Conversations, a three-year intensive course, has guided participants' deep conversations on race, concentrating on personal experiences and feelings. This year, the program will focus more on Unitarian Universalist history with race issues.

**Help for the Undocumented**

UU Meriden was very fortunate last spring to be given a \$5,000 grant from United Way of Meriden-Wallingford. The grant was specifically targeted to assist undocumented residents. These families, identified by activists on their behalf, are unable to receive the federal financial assistance available to citizens. With the grant, SJC bought store cards from two supermarket chains and distributed them during the summer of 2020.

As the pandemic persisted, and citizens received federal assistance directly in the mail, SJC this spring asked for further donations from church members and friends who had received their checks. Dozens responded and gave \$3,000. That will also go to the undocumented. Distribution has already begun, with the purchase of a child's bicycle and a donated scooter, and the rest will be distributed soon.

**Women and Children's Center**

Robyn's House and the WYSHouse are two forms of housing—the former permanent and the latter transitional—for young adults who have found themselves homeless. SJC donated several boxes of goods to help these young people set up their new apartments. We gave toiletries, crockery, blankets, comforters, and clothing to the cause.

**Health Care**

During the year, members of the Social Justice Council attended rallies and conferences and testified before the legislature on health care matters. These include universal health care coverage and HUSKY coverage for the undocumented.



**Policing**

In the year after the murder of George Floyd, the nation has become aware of police interactions with the minority community. The SJC has encouraged people to express their views on policing. This is part of a Meriden initiative to establish a civilian police oversight commission.

Now that a majority of the population is vaccinated, SJC will meet in person, beginning in July. Please look for announcements of our meetings if you would like to participate.

*Submitted by Steve Volpini*

**APPENDIX – FY 2019-2020**  
**Treasurer's Report**  
**Trish Schneider**

The Unitarian Universalist Church in Meriden (UUCM) ended Fiscal year 2020 with a positive net operating income of \$2,342.73 which includes Social Justice Council's share of the collection plate, \$620.83. Surplus income of \$ 1,721.90 was rolled over into the Fiscal year 2021 budget. UUCM was able to obtain SBA PPP Loan of \$10,210 in May of 2020. The loan was used to pay payroll and utilities expenses. UUCM applied for the SBA PPP Loan forgiveness in winter of 2021. UUCM received the loan forgiveness April 20, 2021. I would like to thank Sandy Duffy for all his work on obtaining the SBA PPP loan and loan forgiveness.

**Designated Funds**

We received donations to the following discretionary funds: Memorial Fund and Minister's Discretionary Fund (Pastoral Care Fund). The Memorial Fund received \$690 in donations. The fund balance as of June 30, 2020 was \$2,180. The Minister's Discretionary Fund received \$2,369.09 in donations. The fund balance as of June 30, 2020 was \$2,369.09.

UUCM's Endowment had a modest gain of \$320.16. The balance as of June 30th, 2020 was \$54,095.66

Detail Financial Reports for Fiscal Year 2020 are available upon request. Below are shortened reports. The Fiscal Year 2021-22 Budget is available as a separate document.

**Unitarian Universalist Church in Meriden**  
**Profit and Loss**  
**July 1, 2019- June 30, 2020**

Operating Income	\$ 75,158.33
4100 Annual Pledge	
4120 Collection Plate	
4121 Collection plate-Cash	3,209.37
4124 SJC	4,010.41
Total 4120 Collection Plate	<b>\$ 7,219.78</b>
4130 Special Collections	\$8,970.00
4140 Building Rentals	\$4,369.28
4200 Fundraising	\$ 5,567.09
4300 Other Income	
4320 Surplus	53.71
4325 Sanctuary reimbursement to General fund (deleted)	321.65
4330 Discounts/Refunds Given	362.50
Total 4300 Other Income	<b>\$737.86</b>
4340 Designated Reserves net asset Released	1,390.54
<b>Total Operating Income</b>	<b>\$103,412.88</b>
<b>GROSS Operating Income</b>	<b>\$103,412.88</b>
6000 Operating Expenses	
6010 Financial Fees	536.93
6015 Utilities	10,125.87
6030 Office Printer Lease	2,416.58
6035 Security Monitoring	179.94
6038 Trash	300.00
6040 Insurance	
6041 commercial multi Peril Insurance	3,409.83
6042 Worker's comp. Insurance	460.85
Total 6040 Insurance	<b>\$3,870.68</b>
6050 Mortgage	
6051 Mortgage principal	9,431.61
6052 Mortgage- Interest Paid	2,419.59
Total 6050 Mortgage	<b>\$ 11,851.20</b>
6060 Office Supplies & Software	397.61
<b>Total 6000 Operating Expenses</b>	<b>\$ 29,678.81</b>
6055 UUA Dues	7,000.00
6100 Stewardship	165.00
6200 Professional Ministry	25,431.97
6214 Minister Pension	2,894.06
6230 Professional Ministry- Benefits	4,708.00
6235 Professional Ministry- Professional Expenses	4,000.00
6236 Ministerial moving	3,049.13
Total 6200 Professional Ministry	<b>\$ 40,082.86</b>
6300 Salaries & Wages	9,817.78

6400 Property Expenses	4,388.50
6500 Regular Sunday Activities	5,850.03
6600 Membership	196.63
6655 Leadership Development	25.00
6660 Fundraising seed money	0.00
6700 Social Justice Council	3,423.38
6730 Communication	265.00
6740 faith Formation	177.16
<b>Total Operating Expenses</b>	<b>\$101070.15</b>
<b>Net Operating Income</b>	<b>\$ 2342.73</b>
<b>Other Income</b>	
5100 Special Collections Pass Thru	895.00
5200 Sanctuary Funds (deleted)	4,315.00
5225 United Way Grant	5,000.00
5250 Memorial Fund	775.00
5400 Pastoral Care Fund	3,254.09
5800 unrealized gain (loss)	320.16
Other Miscellaneous Income	0.00
<b>Total Other Income</b>	<b>\$14,559.25</b>
<b>Other Expenses</b>	
6053 Mortgage Budget Offset credit	0.00
7100 Pass Thru donation and gifts	825.00
7200 Chalice Sanctuary Expenses	4,315.00
7400 Pastoral Care expense	865.00
<b>Total Other Expenses</b>	<b>\$ 6,005.00</b>
<b>Net Other Income</b>	<b>\$8,554.25</b>
<b>Net Income</b>	<b>\$10,896.98</b>

Unitarian Universalist Church in Meriden  
Balance Sheet  
As of June 30, 2020

**ASSETS**

## Current Assets

## Bank Accounts

1005 Operations- 6601	25,382.82
1010 target-6628	12,220.87
1020 Online-9090	665.95

Total Bank Accounts	\$ 38,269.64
---------------------	--------------

## Other Current Assets

1120 Legacy fund	54,619.08
1400 Other Current Assets	523.42
1410 Prepaid- Heating Fuel budget plan	

Total Other Current Assets	\$ 54,619.08
----------------------------	--------------

Total Current Assets	\$ 92,888.72
----------------------	--------------

## Fixed Assets

1500 328 Paddock Ave.	250,000.00
1501 Buildings	200,880.16

Total Fixed Assets	\$ 450,880.16
--------------------	---------------

**TOTAL ASSETS**

	\$ 543,768.88
--	---------------

**LIABILITIES AND EQUITY**

## Liabilities

Current Liabilities	\$ 1,843.18
---------------------	-------------

## Long-Term Liabilities

2101 Mortgage-Paddock Avue	54,354.65
2210 SMA PPP Loan	10,210.00

Total Long-Term Liabilities	\$ 64,564.65
-----------------------------	--------------

Total Liabilities	\$ 66,407.83
-------------------	--------------

**Equity**

3110 Unrestricted net assets	9,216.23
------------------------------	----------

3130 SJC net asset	1,122.25
--------------------	----------

3210 CYRE Fund	492.92
----------------	--------

3220 Memorial Fund	1,490.00
--------------------	----------

3230 Building Fund	4,579.73
--------------------	----------

Total 3200 Designated Reserves net assets	\$ 7,684.90
---	-------------

## 3300 restricted net assets

3310 Legacy fund	53,775.50
------------------	-----------

3400 Net asset of building	395,787.44
----------------------------	------------

Total 3300 restricted net assets	\$ 449,562.94
----------------------------------	---------------

Retained Earnings	0.00
-------------------	------

Net Income	10,896.98
------------	-----------

Total Equity	\$ 477,361.05
--------------	---------------

TOTAL LIABILITIES AND EQUITY	\$ 543,768.88
------------------------------	---------------