

First Unitarian Church of Oakland



**Annual Congregational Meeting
March 19, 2017**

Agenda

8:00 a.m.	Check-in and Breakfast - hosted by the Board of Trustees
8:30 a.m.	Gathering Prayer and Chalice Lighting - Clergy
8:35 a.m.	Capital Campaign Announcement – Dick Bailey and Noemi De Guzman
8:45 a.m.	Welcome - Kris Wedding Crowell, President, Board of Trustees <ul style="list-style-type: none">• Reading of Congregational Covenant - Congregation• Quorum Count - Secretary of Annual Meeting• Installation of Moderator - Kris Wedding Crowell• Motion to Elect Dan Goss as Moderator• Review Agenda, Rules of Order, and Voter Eligibility - Moderator
9:05 a.m.	Congregational Business - Moderator <ul style="list-style-type: none">• Explanation of Ballot and Voting• Election of Trustees (private balloting)• Election of Nominating Committee Members (private balloting)
9:30 a.m.	Discussion and Vote on By-Law changes - Laura Tully and Board of Trustees
10:00 a.m.	Staying Safe - Stefan Schneider, Facilities Manager
10:10 a.m.	State of the Church - Pastor Jacqueline, Parish Minister
10:25 a.m.	Justice Council Update - Micky Duxbury
10:30 a.m.	Financial Report - Lisa Rosene, Treasurer
10:45 a.m.	Endowments - Laila Ibrahim, Tom Haw, and Joan Poulter
11:00 a.m.	Recognition of Outgoing Leadership <ul style="list-style-type: none">• Recognition of recent Executive Team Members: Linda Propert Sanford, Bob Crowe and Bill Blakely• Recognition of Outgoing Trustees: Kris Wedding Crowell, Emily Stoper and Micheas Herman
11:10 a.m.	Announcement of Voting Results - Board of Trustees
11:15 a.m.	Benediction and Closing Words - Clergy
11:20 a.m.	Adjourn Annual Meeting

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OUR COVENANT

We, the people of the First Unitarian Church of Oakland, covenant to build a religious community sustained by relationships of understanding, mutual trust and respect.

Guided by our mission and collective inspiration, we will encourage all our members to participate fully in congregational life and to grow and learn together in faith and love.

Knowing that what one of us does affects the community, we covenant to act with loving kindness in all our endeavors by speaking directly and positively with one another.

We recognize that this calls for honesty in communications, valuing of diversity and inclusive process. We covenant to engage in ethical communications, to take our concerns to those responsible and to refrain from gossip.

Recognizing that conflicts have the power to strengthen or diminish our relationships, when they arise we will handle our disagreements with courtesy, fairness and forgiveness.

We promise to listen on one another, assume good intentions and identify common goals. In support of our shared ministry we covenant to honor our commitments, keep our decision making processes transparent and give generously of our spiritual gifts and material resources. This we covenant together.

OUR MISSION

We, the members of the First Unitarian Church of Oakland, unite to build a beloved community within and beyond our walls. Guided by individual conscience and wisdom from many sources, we gather in worship and service to nourish the spirit, work for justice and celebrate the divine in all.

OUR ENDS

The First Unitarian Church of Oakland embodies beloved community as an intentionally multigenerational, multiracial, multicultural, anti-oppressive Unitarian Universalist religious community. We work for spiritual and social transformation within, among, and beyond ourselves in support of our vision, mission, and ends.

Transformation Within

Church members and friends discover and articulate personal spiritual growth. We lead lives of integrity and meaning that reflect our spiritual identity and values.

Transformation Among

People of all ages who are part of our church community experience caring relationships which connect us to an ever wider circle of life. We use our collective gifts and learning to nurture and expand beloved community. We overcome barriers that divide the human family.

Transformation Beyond

Our neighborhood, the city of Oakland, and the world community are more just and compassionate because of our prophetic role and ministries. We generously share our human and financial resources beyond the walls of our church.



ANNUAL MEETING RULES OF ORDER

1. In accordance with the by-laws, only members of the congregation may vote. A simple majority of members present (based on the initial quorum count) will be sufficient to act on behalf of the entire membership.
2. Except where noted, voting shall be by raising hands. Votes are “up or down,” with allowance for minor, friendly amendments at the discretion of the Moderator. If there is a need for discussion which cannot be completed within the time allocated on the agenda, the matter will be referred back to the Board of Trustees with the charge of arranging for an opportunity for congregational discussion and vote, if needed, within the next 60 days.
3. Nominations and other voted-upon issues, whether private ballot, show of hands or other means, must be passed by a majority (50% +1 of eligible voters present at meeting).

*Only votes **FOR** are factored into deciding a majority vote. Votes against and abstention votes lead to the same result: a negative vote. For instance if there are 110 eligible voters, a majority is characterized when there are 56 votes in favor ($110/2 = 55$ plus 1 = 56). But this is not the case if there are 54 votes in favor, 20 against and 36 abstentions, even though there are far more "yes" votes than "no" votes.*

Not marking the ballot or not raising your hand will be counted as an abstention and may affect the decision/outcome of a vote.

4. Discussion must be limited, in order to complete the agenda in the time allotted:
 - a. Any person may speak only once to an issue.
 - b. Comments must be brief and to the point.
 - c. The Moderator may limit comment.
5. Any modification of the rules is at the discretion of the Moderator.
6. All speakers at the annual meeting must use one of the microphones to speak. Before speaking, speakers must be recognized by the Moderator.
7. Robert’s Rules of Order apply, except that the above rules will prevail in the event of conflict.

NOMINATED TRUSTEE CANDIDATES

KATE LENHARDT, CANDIDATE FOR A 1-YEAR TERM

I have been attending the First Unitarian Church of Oakland since 2001. I attend every Sunday that I am able. It has become an integral part of my life. I have embraced the Unitarian Universalist faith and believe that I've found my spiritual home.

At first, I was primarily involved in Religious Education for our youth. After that, I ushered and greeted on a regular basis. I continue to enjoy welcoming others to our congregation. I have done some reading about UU and joined the most recent pilgrimage to Transylvania with members of our church. It helped me understand our UU origins and how our faith lives in our partner church community.

I recently retired as an adult psychologist at Kaiser Permanente. I worked at the Union City Medical Center, which has the most diverse membership in all of Northern California. I have taken courses and seminars regarding diversity in age, race, culture, ethnicity, gender, gender identity, sexual orientation, SES, religion and physical ability. As a psychologist, I will continue to take courses in diversity and social justice. At the same time, I am open to engaging in additional training to better support the church's intention to be more broadly inclusive.

ELLA WISE, CANDIDATE FOR A 3-YEAR TERM

I started attending UU Oakland in the summer of 2015, and I became a member in February of 2016 after a stirring sermon by Guest Preacher Amanda Weatherspoon about Black Liberation. I took the Embracing Journeys class and am a member of a Covenant Group. I was raised in a UU church in Kingston, NY—a small town in the Hudson River Valley. I also practice meditation and study dharma in the Shambhala buddhist tradition.

I look forward to serving on the Board to further explore my faith, to learn from fellow congregants and congregational leaders, and to try to do my part in building a beloved community. I admire and appreciate that the Vision of the Church, including the words “radically inclusive,” is declared so often on Sunday mornings. Although the Vision may be aspirational, the words are powerful. I intend to remind myself of this Vision at every Board meeting, as I expect that other Trustees do, as well. As someone who is relatively new to the church, I hope to offer a fresh perspective that may be helpful in seeing how the Board's existing procedures, policies, and institutional habits could be revisited to better support the church's intentions.

Outside of church, I am a city planner at a firm in San Francisco. I play on a basketball team and also serve on the board of Walk Oakland Bike Oakland (WOBO), a local pedestrian and bicycle advocacy organization.

REPORTS

BOARD OF TRUSTEES

Submitted by Emily Stoper

This has been a busy year for the Board, with accomplishments in many areas:

Support for Church Ministries, Professional and Lay

- Presented a proposal to expand Rev Jacqueline's call from Minister for Faith in Action to Parish Minister, then set up meetings and an election, at which the proposal was endorsed by 97% of the congregation
- Hired Rev. Sheri Prud'homme as Associate Minister for Faith Development
- Began planning for Rev. Jacqueline's sabbatical in winter and spring 2018
- Appointed a personnel committee to recommend policies and develop procedures and manuals and perhaps a grievance procedure. Appointed members of the Committee on Shared Ministry, which we had been without for three years. This committee is central to the task of continually assessing how well we are following our mission and vision.
- Appointed a team to negotiate the salaries and terms of employment for Revs Jacqueline and Sheri – which eventually became the Clergy Visioning Team
- Created a Communications Task Force and appointed its members
- Conducted a well-attended Leadership Retreat
- Approved church sponsorship of the ministerial candidacies of Em Kianka, Becky Leyser and Mira Mickiewicz

Changes in Organizational Structure and Governance

- Developed a church organizational chart (the Collaborative Leadership Model), gave the congregation opportunities for input, and then approved the new model
- Developed and approved position descriptions for the church administrator and facilities manager
- Appointed two Board members (Kenji Oshima and Emily Stoper) to supervise the facilities manager
- Appointed Rev. Jacqueline to supervise the musician part of Stefan Schneider's work
- Shared supervision of the church administrator with Rev. Jacqueline
- Established a commission to revise the church Bylaws, vetted the commission's proposals, sought input from the congregation (incl. meetings) and presents the new Bylaws for approval at the Annual Meeting

Financial Stewardship

- Ran the stewardship campaign, which raised over \$440,000 - more than any previous stewardship campaign had ever raised
- Approved a 2017 budget of over \$600,000, including (for the first time in many years) the church's fair share to the Unitarian Universalist Association
- Recruited a team to run an auction in spring 2017
- Approved the sale of the church's hand-bells (which has yet to be arranged)

Improvements in Board Operations

- Established a committee to revise the Board’s policies and completed revisions of Sections IV and V
- Acted to increase the Board’s transparency:
 - Moved up our internal schedule so that the Board’s agenda is sent out several days ahead of its monthly meeting;
 - Took steps to publish meeting minutes relatively soon after the Board meeting;
 - Established a policy of advertising and widely recruiting for committee members;
 - Changed our meeting location and arrangements to be more accessible
- Appointed Kate Lenhardt as a new member, replacing B Avalon, who resigned

PARISH MINISTER

Submitted by Pastor Jacqueline Duhart

After a bit of gnashing of teeth, guerrilla gardening, praying and consulting trusted colleagues (in this order) I came to the conclusion that I would answer the new call from my understanding of God and Goddess and serve as the full time Parish Minister to First Unitarian Church of Oakland. My capacity to answer this call did come with a few conditions. First, I would serve in the role of Interim/Developmental Minister. My primary focus would be to spiritually guide, support and lead the congregation in its discernment and preparation to call their next settled minister. Secondly, I would serve in this capacity for up to 3 years (end date Mid-August 2019). Third I would take my sabbatical from January to June of 2018. And finally if this seemed like a viable idea to the Board of Trustees and the congregation I needed there to be a congregational vote. A yes vote of 85% would secure my yes to serve as the full time Parish Spiritual Leader, wearing the hats as an Interim/Developmental Minister. On Sunday, April 10, 2016, First Unitarian Church of Oakland issued a people’s mandate for me to serve as their Parish Spiritual Leader for at least 3 years. What an honor, a privilege, a blessing!

This program church year has been what my Biblical Studies professor in seminary referred to as a “thick time,” meaning much happened that was not just noteworthy but transformational.

Beyond our walls, the 2016-2017 program church year was politically shaped by: Pope Francis’ visit to Mexico, the Paris Climate Accord, Britain’s exit from the European Union, punitive restrictions to voting rights, immigration and abortion services, President Obama and family’s visit to Cuba (first U.S. President to do so in 88 years), eight year presidential term for President Obama coming to an end, Hillary Clinton becoming the first female to be nominated for the office of President by a major political party, the election of Donald John Trump as the 45th President of the United States of the Americas (USA), rumors that Russia interfered in the USA election process, the Women’s March on Washington and Pussy Hats and Standing Rock. Socially, the various ministries were impacted by the death of Prince, David Bowie, Harper Lee, Muhammad Ali, and Leonard Cohen. The Chicago Cubs after a drought of 108 years won the World Series.

Within the walls of this historic religious community, Great Spirit made many powerful statements:

- The Board of Trustees took up the recommendations of the well-crafted 2014 Transitions report and seated a Committee on Shared Ministry, Personnel Committee, placed the Parish clergy on

the Executive Team (ET) prior to suspending the ET until such time that the church could discuss and review current and future needs, and brought renewed energy to clarifying, growing and nurturing their relationships with the Journey Toward Wholeness Transformation Team (JTW) and the roles of JTW

- The Stewardship Team led a successful campaign and for the first time in many years utilized resources through the District. Rev. Veil Weller, Congregational Giving Director was our Stewardship Kick Off Sunday guest Preacher. As a result of our Stewardship Campaign, First Unitarian Church Of Oakland will become a Fair Share Congregation and renew its commitment to being a Teaching Congregation by having a part time seminary intern in the Fall of 2017
- Being attentive to creating a vibrant, effective and responsive business side of the church the Parish Spiritual Leader assumed supervision (known as Collaborative Reflections) of the Associate Minister of Faith Development, Church Administrator, the music staff and had regular conversations with the Church Choir Director who was a contract employee and exempted from traditional supervision. These changes also saw the resignation of the Church Administrator after 10 years of service to the church.
- Being attentive to the needs of members, friends and allies to grow spiritual depth and share their gifts and talents within beloved community, new teams were created: Faith In Action Justice Council and Worship Arts Team Sunday Worship and its liturgy was also reshaped: Board of Trustees routinely highlight the announcements and invite us to rise in body and spirit to greet one another, in both services, in the early phase of the liturgy we offer a brief centering prayer, at the end of each service we Send the Flame and once a month we offer an intergenerational- worship service when we all worship together. This year the Committee on Share Ministry will administer a congregational survey to assess the health and vibrancy of both services.

Yes, this has been a thick time. So much has given rise to the need for liberal and progressive people of faith to lift their voices and take to the streets in solidarity with many people on behalf of our experimental democracy, civil liberties, freedom and justice for all. Thank you, First Unitarian Church of Oakland, for placing your faith in me and giving me the opportunity to live out my call and serve something larger than myself. What an honor, a privilege, a blessing! May we continue to equip ourselves, our beloved church community within and among, and this church building to serve and minister to the needs of the whole.

ASSOCIATE MINISTER FOR FAITH DEVELOPMENT

Submitted by Rev. Sheri Prud'homme

With Pastor Jacqueline's transition into the position of parish minister, it has been my privilege to partner with her as half-time Associate Minister for Faith Development, expanding my portfolio to include membership, adult faith development, and some worship leading, along with children and family ministries. Increasing the hours of the Children and Family Ministries Coordinator to eight per week and staffing the nursery through eighth grade Sunday morning program with four paid staff have been key to affording me the time to provide attention and leadership to all these areas.

Most of my creative energy has been focused in the area of yearning that was identified in the fall stewardship visioning: deepening connections. Here, the three areas of my portfolio inter-relate beautifully. It is clear that children and youth are enjoying church and learning and growing from their experiences here. New families drawn by our mission feel welcome here. But unless the parents find ways into deeper connection with the mission, ministries, and people of the congregation, many of the new families drop away after a few months. The adult faith development team has taken some incremental steps this fall toward developing a cohesive adult faith development program that serves the mission, vision, and ends of the church so that newcomers can deepen connections with one another and the transformative power of engaging their spiritual life here at First Unitarian. There is more work to be done, including formalizing leadership development, but we have begun! With the newly re-formed membership team, we have also begun to explore formalizing some of the pathways into connection for newcomers with the ministries of the church.

My work has been aided by the board's efforts this year to clarify the congregation's organizational structure, and I hope that work will continue. It is also my hope that the new church administrator will have communications and data management as key areas of responsibility. A website with consistently updated current information for visitors and members alike, clear and consistent ways to share information about church programs and church decision making, and a streamlined and effective way to handle data management so that the right people have access to information that will facilitate their participation in the ministries of the church will all be important going forward.

In the longer view, I would like to call the congregation's attention to the need for dedicated youth space. There are many components to successful youth ministry, but a space to call home is one piece of the puzzle. We increasingly are relying on the middle school youth having their own programming to avoid overcrowding in the 1st-5th grade space on the second floor on Sundays. Secondly, as we enjoy a period of stability and church growth, I would encourage church leadership to proactively begin formulating ideas for what comes next when the congregation nears capacity for our building. Rather than decreasing in size or splitting off a new church because of a conflict, let's begin imagining possibilities like intentionally planting a new church or having a satellite campus.

CHILDREN AND FAMILY MINISTRIES

Submitted by Rev. Sheri Prud'homme

The Children and Family Ministries team consists of Claire Eustace, Nicole Fitzhugh, Johanna Metzgar, Ingrid Mittermaier, and Kathy Vermazen. In our innovative, multi-age program, worship is the center of our children and family ministries. The children and youth begin each Sunday with a worship experience, either a children's chapel in the Starr King Room that follows the spiritual theme of the month or a story for all ages in the sanctuary. Once a month, Pastor Jacqueline and Rev. Sheri collaborate on an intergenerational worship service where the whole community of all ages worships together for the entire hour. The 1st through 5th grade children have been encouraged to memorize the purposes and principles this year, through a fun 7 Principles Challenge. Ingrid Mittermaier and Claire Eustace have also led several spirit in action Sundays with the elementary aged children, including ones addressing the Dakota Access Pipeline and a theater of the oppressed Sunday. Our Coming of Age Program for six

7th-9th graders is led this year by Em Kianka, Mira Mickiewicz, and Wes Radez. Our high school youth group meets once a month with Jenn Beach and Elinor Mattern. The Children and Family Ministries program is staffed by a portion of Rev. Sheri's half-time position, eight hours a week of a Children and Family Ministries Coordinator, Nicole Fitzhugh, and Sunday morning staff of Dorothy Paul in the nursery, Sara Leyser and Aria Killebrew-Bruehl in the Spirit Games Room, and Amanda Weatherspoon leading our middle school program, Club UU. Kathy Post volunteers her time as the Signs of Love Youth Choir Director. In 2016 we served 145 children and youth from nursery through high school. Sunday morning attendance averages around 40. Multigenerational events such as Secret Buddies, the Halloween Party, the Winter Holiday Concert, and congregation-wide Justice actions create connections in our congregation. The week-long summer day camp, Chalice Camp, co-directed by Laila Ibrahim and Rev. Sheri, provided 40 hours of religious education to 37 children and youth in the summer of 2016, mostly from the First Unitarian Church of Oakland, creating deep connections among the children and youth of the church. The curriculum this past summer was focused on UU history and theology.

COMMITTEE ON SHARED MINISTRY

Submitted by Steve Thomasberger

We are a new committee of the Board of Trustees. We understand that the Committee On Shared Ministry (COSM) is a primary agent upon which the congregation relies to attain the highest possible fulfillment of its mission and vision. The COSM is responsible for working out a plan to assess the effectiveness of every part of the congregation's ministry, and to make recommendations to the Board.

Members serve for terms of one year, two years and three years. We met for the first time in June of 2016. The 3rd Sunday after church was chosen for our regular meetings.

Ministerial Aspirants

The committee has interviewed three ministerial aspirants this year and recommended that the Board approve them for church sponsorship. They are Em Kianka, Becky Leyser, and Mira Mickiewicz.

Worship

A focus of our work this year has been to assess the vibrancy of the two Sunday services, children's chapel, and second Tuesday Vespers service. We have constructed a survey for congregants to gather information about our members' opinions of our worship services. This survey will be available online, and hard copies of the survey will be distributed after first and second services on March 26 and April 2. We have also met with the new Worship Committee to gather information about their understanding of their mission.

Church Ministers and Staff

We will interview the church's Personnel Committee to understand the purpose and scope of its work. We understand that the Personnel Committee's ministry is to assess the health of the church's ministers, staff, and church consultants.

Communication Within and Beyond Our Walls

The committee will review the effectiveness of keeping the congregation informed regarding worship, events, and challenges facing the church.

Conflict Management and Resolution

The committee recognizes that within the church there can be conflicts that may threaten, or have an adverse effect on, the congregation's ministry. The committee understands that a process for conflict resolution must be developed. We will be following how this process develops.

The "Program" Church

The committee sees it as our ongoing responsibility to understand what it means to be a program church. This question will be asked continually throughout our assessment and evaluation processes.

We look forward to being of service to the congregation in the future as we prepare for a new minister and the departure of our beloved Pastor Jacqueline.

Steve Thomasberger, chair

Carol A. Scott, co-chair

Betty Seiden, Barbara North, Donna Fujioka, Margaret Woodside

GREETING AND WELCOME MEMBERSHIP TEAM

Submitted by Rev. Sheri Prud'homme

Thirty-seven people joined First Unitarian Church between March 6, 2016 and the writing of this report on February 28, 2017. Most individuals sign the membership book and become official members after a church service. Some sign the membership book after participating in the three-part series, Embracing Journeys: Welcome to Unitarian Universalism and the First Unitarian Church of Oakland. Covenanting with the larger church body takes place on a Sunday morning during worship twice a year. Membership Office Volunteers, Gil Dacumos and Maria Bielass, volunteer each week in the office to follow up with each visitor who completes a visitor connection card, to make name tags, enter members into the database, and provide support for the formal Ingathering of new members and when available staff the Welcome Table after worship in Wendte Hall. Greeter Coordinator, Jodie Mathies, continues to shepherd a team of warm and welcoming people to greet members and guests each Sunday morning. The warmth of welcome at First Unitarian is something visitors often remark on. Our current weakness is helping newcomers find meaningful connections in the congregation past their initial welcome. A team of Maria Bielass, Gil Dacumos, Jodie Mathies, Clark Sanford, Laura Tulley, Mark David Watanabe, and Rev. Sheri have begun meeting to address this challenge.

STEWARDSHIP

Submitted by Janet McFarland

Stewardship is our yearly commitment of time, talent and treasure to our shared ministries that seek to transform our hearts and lives, our communities and our world. The practice of pledging is an

opportunity for each of us to engage in ethical and/or spiritual reflection on the ways we each can support this beloved community, and is necessary for honest and transparent budgeting.

Each December the Board of Trustees approves a budget for the following year based on the pledging commitments friends and members have made during the fall stewardship campaign.

We emphasize the use of a giving guide based on percentages of individual baselines. The spirit of the campaign is personal generosity and gratitude for all the gifts given and received. Members who are unable to make financial commitments request ministerial waivers of the minimum donation required to be a voting member.

Final report on 2016 Pledges (Pledge Drive of Fall 2015)

We received pledges from 190 families and individuals, a slight increase over the previous year.

Total pledged was \$407,647 (a 10% increase over the previous year). Additional one-time gifts from members brought the total to \$419,147.

\$412,669 was received. For the second year in a row we achieved a fulfillment rate of 98%. This is a great testament to the commitment and generosity of the congregation.

Report on 2017 Pledges (Pledge Drive of Fall 2016)

We received pledges from 196 families and individuals, another increase in our pledging base.

Total pledged was a whopping \$448,759 including one-time gifts inspired by the pledge drive. This is a 7% increase over last year.

In addition to continued support of our programs and building, this year's generous donations will fund the following:

- Support for our clergy and staff at medium range Fair Share Compensation Guidelines for the Bay Area
- Cost of living increases for our full-time staff
- Pay increases for our long-term hourly staff
- A new staff position to lead Club-UU, our middle-school youth program
- A part-time pastoral minister for visits to those in hospital
- A much-anticipated visit from Mark Morrison Reed
- Building our reserve
- Fair share giving to the UUA and regional organizations.

We know circumstances change, and not everyone can fulfill the pledge made. Also, some people are able to increase their pledges due to more favorable circumstances or a realignment of their priorities. And during the year new members add their pledges.

A simple call to the office, an email to stewardship@uuoakland.org or submitting a new pledge form via the [PLEDGE button](#) online is all it takes to make adjustments to your pledge. We understand circumstances can change and appreciate the communication.

Stewardship Campaign Summary

As the culture of shared ministry in the church grows, and members and friends express their support and love financially we are able to simplify the annual Stewardship Campaign. This year

- We hosted a visioning session led by member Carol Emert
- Mailed out pledge forms
- Hosted guest preacher Reverend Vail Weller on Stewardship Sunday in October
- Held a community potluck gathering the same day
- Hosted four house parties with about 45 people attending
- Made good use of the short-and-simple pledge form
- Encouraged use of the online pledge form
- Invited our youth to pledge
- Emphasized the deep love and sense of connection we are growing together

Our goal is to encourage everyone to consciously commit to our community each and every year as part of an ethical or spiritual practice while making the act of communicating those commitments easy and convenient.

Gratitude

The Stewardship Team is responsible for maintaining a year-round presence and running our fall campaign. We are supported in these efforts by the Financial Team, the Executive Team and the Board of Trustees. We are assisted in these efforts by resources from the UUA Stewardship Program called FORTH.

Members opened their homes and hosted house parties, even preparing meals for those who attended. Bob Crowe helped make that happen.

Bill Blakely (Executive Team) and Brian Joaquin (Finance Team) spent hours in the church office updating the tracker as pledges came in.

The Finance Team updated the automatic payment system.

Board members made phone calls and sent out thank you notes to pledgers. Joyce Cutler is picking up where they left off. Our goal is for everyone who pledged to receive a thank you.

Pastor Jacqueline and Molly Hermes supported and advised us on our campaign. Pastor Jacqueline made a beautiful ritual in which we wrote our passionate dreams on flames and created a chalice of hope.

Thank you all for your willingness to invest your time, talent and treasure into this beloved community. Together we serve our mission to weave a tapestry of love we call community, to gather in worship and service to nourish the spirit, to work for justice, and to celebrate the divine in all. Together we work toward our vision of building a radically inclusive community, to grow the beloved community by expanding the welcome table and deepening our commitments to countering oppression as an intentional multiracial, multicultural, multigenerational congregation.

FINANCIAL LEADERSHIP TEAM

Submitted by Lisa Rosene

The Financial Leadership Team (Finance Team) oversees the financial transactions and well being of the church. The team is responsible for:

- Financial oversight and reporting
- First line budget preparation
- Data support for Stewardship and Capital campaigns
- Follow-up and maintenance of pledge data base
- Year-end donor letters and 1099 forms
- Acknowledgement of all pledges and donations
- Recommendations to the Board as needed

The 2016 team continued to work on improving the financial health and transparency of church transactions under the outstanding leadership of Molly Hermes, with team members Bill Blakely, Hester Green, Brian Joaquin, Bob Crowe, Mary Carbone, Janet McFarland and Lisa Rosene.

The church finances remain “in the black”. Hester, Bill and Molly have devoted countless hours ensuring accurate updating of the budget via QuickBooks and VANCO, the system used for automatic deduction of pledges. They have generated reports as needed refined the systems so that users can generate their own reports in the future.

In addition, an internal audit has been completed with recommendations of tasks to be done in preparation for an external audit tentatively scheduled for 2018. Bill payments continue to be made by Amanda Smith in the church office.

The team has laid the ground -work for the hiring of a bookkeeper in 2017 and will be assessing the church’s accounting needs as well.

We would like to express a special thank you to Molly for her tremendous efforts to put our church on solid financial ground. She has worked tirelessly to ensure that FUCO thrives for decades to come. Her dedication to the financial health of our community is a priceless gift that we applaud as she takes a much -deserved break from this work.

The Finance Team meets on the second Saturday of each month from 9:00-11:30 in the library on the third floor of the church. Please contact any member of the team if you would like to join us in this rewarding work!

ENDOWMENT TEAM

Submitted by Joan Poulter, Tom Haw and Laila Ibrahim

The Board of Trustees created a three person Endowment Team to remain abreast of the status of all of the church's endowed funds, review their use, promote their funding, and report on them at the annual meeting. Our endowment funds ensure and strengthen the vision, mission and presence of First Unitarian Church of Oakland for the future.

Our inaugural year as a team went very well. We now have three congregational accounts held by the UUA common endowment fund (<http://uucef.org>) after opening two new ones to best reflect personal values. The UUA also holds two trust accounts for us that we have no oversight or control over.

The Wendte Endowment (balance: \$194,279.70) will provide revenue for the maintenance of and improvements to First Unitarian Church's historic building. Permissible uses of the fund are restricted to those that specifically pertain to the building itself and any building needs. Uses may include repairs or maintenance of any kind, replacement of any furnishings or finishes, salaries, acquisition of any new furnishings or finishes, expansion or modification of the facility or any other capital use. (opened in 2016).

The Aurelia Henry Reinhardt Endowment for Justice (balance: \$10,679.16) will provide revenue to support the justice ministries of First Unitarian Church of Oakland. Permissible uses will include salary and benefits specifically restricted to justice work; program expenses specifically restricted to justice work; any special events specifically related to justice work; and materials or other expenses related to justice work including transportation, food, rentals, printing or other expenses. (opened in 2016).

First Unitarian Oakland Memorial Endowment Fund (balance \$113,653.88) provides general operating support for routine, ongoing or normal expenses in the Church's annual budget, including but not limited to salary and benefits, administrative expenses, facility maintenance and repairs, utilities, taxes and insurance, program expenditures, dues and fees, building mortgage, fundraising expenses and accumulation of reserves. (opened in 1930s).

The Operations Endowment paid out to the congregation: \$4,031.41.

The other endowments will not make payments until they reach \$500,000 each.

In gratitude for our current congregation and faith for our future church.

BOOST! WEST OAKLAND

Submitted by Debbie Brown

The Boost! West Oakland tutoring program, started by members of the church 20 years ago, once again provided one-and-one-half hours of tutoring a week for approximately 70 children at Lafayette Elementary School. This year eight of the Boost tutors were from First Unitarian. In February First Unitarian hosted a lunch for students, parents, and tutors, followed by a visit to the African American History Museum and Library next to the church.

Many healthy snacks were collected from members of the congregation and delivered to the program. Two members of the church serve on the Boost Advisory Board and many church members contributed to the annual fund-raising campaigns. In December we conducted a coat drive and delivered 80 coats to Lafayette School for the second and third graders..

YOUNG ADULT GROUP

Submitted by Brian Joaquin and Sarah Letson

The Young Adult group at First Unitarian Church of Oakland is a social hub for young(ish) people that are associated with UU Oakland. At the center, we are a loosely defined group that 1. Seeks to be welcoming to young adults on Sunday mornings and 2. Strives to be a network of support for young adults in the Bay seeking social and spiritual community.

The young adults faithfully plan and run Vespers services on the second Tuesday of each month, newly preceded by collective dinner-making. The group gathers every few months for social potlucks, including food and board games. We have a Facebook group with 192 members, which we use to disseminate information about programs and activities in the church, young adult programs, Vespers, and information relating to our own work, activism, and interests. It is essentially an open virtual community to stay in tuned with each other outside the walls of First Unitarian Church of Oakland.

While the Facebook group membership has increased, general participation and vibrancy of the Young Adult group has declined over the past year, fueled by several key members reducing their participation because they joined seminary, moved out of town, or had other life changes. We've discussed ways to increase membership, including tabling during coffee hours and returning to a more regular schedule of monthly potlucks. Any suggestions the board has for this are welcome!

Some event highlights from our past year include:

- The annual All-Church Thanksgiving Dinner where several members & friends brought a dish of their choice to share with one another
- Themed social potlucks, including "Everyone's Birthday Party," "Mardi Gras," and a screening of the academy award winning film Moonlight
- Vespers services every single month on the second Tuesday

ADULT FAITH DEVELOPMENT

Submitted by Rev. Sheri Prud'homme

After over a year hiatus, Rev. Sheri gathered an Adult Faith Development Envisioning Team in late fall 2016 consisting of Carol Emert, Charlotte Dickson, Carol Scott, and Emily Stoper. While recognizing worship, covenant groups, and offerings by the Journey Toward Wholeness team are key to the faith development of members of the congregation, the team imagined additional ways to deepen the connections among church members and encourage their spiritual growth. We experimented with offering workshops in the 45 minutes between services, re-instituted circle suppers, and offered several courses: Poetry in the Time of Trumpism with Ron Weisberg, The Wi\$dom Path with Janet McFarland, and Spiritual Deepening for Women with Sarah Moldenhauer-Salazar. To date, the in-between service advent sharing group in December was deemed a success. The in-between the services series in February served congregants as follows: Nature as Spiritual Resource by Rev. Sheri drew 10 participants, Process Theology with Terra Collier-Young drew 15, and Inspiration from Facing Race: A National Conference with Charlotte Dickson drew 25. Spiritual Deepening for Women did not get enough interest to proceed. The other courses and circle suppers will happen later in the spring. The ongoing Church Book Group led by Emily Stoper and the Buddhist Sitting Group led by Carol Emert have a strong following.

COVENANT GROUPS

Submitted by Anita Thomson

We currently have seven covenant groups, six meeting evenings, and one meeting in the morning. About 40 church members and friends are in these seven groups.

Covenant groups have 5-12 members. They are places where you can develop deep relationships with people in the church, across race, age, gender and sexual orientation. They are venues for the discussion of the congregation's themes of the month, current events and issues in our lives. Covenant groups also offer service to the church and the greater community. You need not be a member to join. I, Anita Thomson, assign new members to groups.

ELDERS AND OTHERS

Submitted by Judith Hunt and Joan Poulter

Elders and Others is in hiatus, temporary we hope. As co-chairs we view this as a valuable connection for the congregation. We are trying to figure out a format that would meet the needs and interests of the community. Any and all ideas would be welcome.

CENTER FOR URBAN FAMILY LIFE (CUFL)

Submitted by Ben Thompson

The Center for Urban Family Life is a 501(c)3 non-profit organization that is affiliated with our church and is the fiscal sponsor of the McClymonds Merit Award (MMA) program. MMA provides small college scholarships to graduates of McClymonds ('Mac') High School in west Oakland. Any Mac grad that attends any type of college (inc trade schools) is eligible to receive between \$1000 and \$1500 per year, as long as they maintain a minimum 2.0 GPA. For many of our students, the MMA award is the only

scholarship they receive. Again this year, we are supporting approximately 35 college students who graduated from 'Mac' between 2011 and 2016. MMA volunteers include: Andrew Beretvas, Ben Thompson, Joan Poulter, Kristin Cato, and Don Hermes. We seek additional volunteers for this worthy program. Contact Andrew.

PASTORAL ASSOCIATES

Submitted by Judith Hunt

Pastoral Associates are lay members of the church who aim to provide comfort, help and support to fellow congregants who are just home from the hospital, have a new baby or are housebound; help for church members nearing the end of life and with memorial services; and with a variety of expected and unexpected situations. PAs also can provide a listening presence and we keep confidentiality. Referrals come via pastoralcare@uuoakland.org, from the clergy, church office or other congregants, or by people who read our name tags.

Many of our responsibilities are carried out by a larger group of Lend-a-Handers who volunteer for specific sorts of tasks from bringing meals to a ride to an appointment and are called on to do an individual activity- please do sign up at the Pastoral Associates table during coffee hours on the second Sunday of the month.

PAs meet monthly, year round, and during 2016-2017 we were delighted to have a chaplain, Michelle Ma, join us after a period without a chaplain. Last spring we were also successful in adding three more associates in time for a training for us all by Rev. Abbey Tennis and we are now: Dick Bailey, Gil Dacumos, Judith Hunt, Kelly Jonick, Daphne Parson, Corless Smith, Ben Thompson, Annette Williams.

JOURNEY TOWARD WHOLENESS

Submitted by Rev. Kurt A. Kuhwald, Endorsed Community Minister, on behalf of JTW

2016 was a year of steady focus for the Journey Toward Wholeness Transformation Team and the work to which it is dedicated: Keeping the vision of being an anti-racist, anti-oppressive congregation front and center in the life of the Church.

- We work to understand how racism and oppression have shaped our lives. and engage in meaningful dialog about the ways we experience internalized racism and oppression.
- We develop tools to move beyond guilt and blame and create processes and offer workshops to help those involved in all aspects of church life to work toward dismantling racism and oppression individually, organizationally, and institutionally.

Our work this year included continued generation of and support for major programs focusing on anti-racism and white privilege. We put a face on our vision of anti-racism by installing the Black Lives Matter sign on the front of the Church, making our commitment one of the first things people see as they approach the building. JTW also provided a process monitor for most FUCO Board meetings.

Support and staffing for *Beloved Conversations* program in the spring and *Jubilee World II* in the fall were strong on-going components of JTW's commitment to both understanding individual experience of and participation in racism and privilege, as well the systemic structural foundations that continue to keep racism alive in our country, our city and our Church.

First Sundays offers on-going programming on the first Sundays of each month following the Services. The meetings alternate each month between caucuses where those identifying as Persons of Color and those identifying as white meet separately with meetings that include all racial identities. A group for those who identify as being of mixed race has also convened. First Sundays has contributed strongly to offering members of the Church continuing opportunities to work on, learn about, and practice anti-racism within their Church family in spaces that are both brave and safe.

Noemi de Guzman joined the Committee in July of 2016 bringing our membership to three female identified and two male identified members—two members are persons of color and three identify as white. While we believe it would serve the Church best to have an equal mix of racial identities, we acknowledge that at the present moment, the demographics of the congregation may preclude achieving and keeping this balance. Aside from Noemi and myself, our current members are Donna Fujioka, Heather MacLeod, and Dennis Rowcliffe.

We met with Rev. Jacqueline Duhart a few times during the year, and when she entered the role of “lead” minister our conversation focused on the necessary role of JTW in leading AR/AO efforts in the church, and in grounding the vision of First Church as an inclusive, anti-racist congregation. We are especially concerned to support her as an African American minister—which is rare within UUism.

We continue to do our best to act boldly with the interests of the whole congregation at the center of our decisions—despite sometimes taking action that is challenging to some of our members. We accept with humility the difficulty of representing the leadership of AR work within a largely white congregation and remain open to and welcome the critique (as well as the support) of Church members.

CAPITAL CAMPAIGN

Submitted by Noemi de Guzman and Dick Bailey

Some of you might be unaware or might have forgotten that not long ago, congregants and guests entering our sanctuary, Hamilton Hall, were greeted with this message:

This is an unreinforced masonry building. You may not be safe inside or near unreinforced masonry buildings in the event of an earthquake.

Ominous as it was, the sign did not deter our community from continuing to worship together, to be present for each other, to learn and grow, and to persevere in our mission. It is in this spirit of commitment to our collective vision and to each other in community that we invite you to complete and celebrate this Spring the capital campaign which we undertook two years ago—but the story goes back even further.

In 2008, affirming our willingness to dream big and act boldly, this congregation took out a \$2.2 million loan that funded the seismic retrofit and renovations to our sanctuary, making it safe and maintaining its beauty for us today and for generations to come.

Alas, the Great Recession intervened and, still feeling its effects six years later, this devoted congregation was left wondering how to continue the \$5,002 monthly mortgage payments. An independent study found compelling reasons not to conduct a capital campaign.

Nevertheless, in early 2015, this church community set a miracle goal to secure \$775,000 in pledges toward a capital fund, separate from and in addition to operations funds raised through our annual stewardship drive. The capital funds would be used to pay off what remained of the loan by May 2017—saving First Unitarian tens of thousands of dollars in interest payments, fending off a final sizable balloon payment in 2020, and freeing up \$5,002 a month to be put toward other worthwhile programs and services within and beyond our walls.

An astounding \$776,630.12 was pledged in May 2015!

We cannot say “thank you” enough to each of you who has given of you time, talent, and/or treasure throughout this campaign. We hope that each contribution was given in joy, in hope, and in love. Each was received with much humility and heartfelt gratitude.

Today, (this is being written on March 4, 2017), we are so very close to our goal of paying off the mortgage this May. We project that by April 30, you will have generously contributed an incredible amount of almost \$770,000 to the capital fund. Wow! Thank you again.

So just how close are we? We estimate that we will be just \$14,000 short of the amount needed to reach our goal of fully paying off the loan this May. (A portion of that may come in later in the year through employer payroll deductions; some of that total includes a very few unfulfilled pledges; and the remaining shortfall can be attributed to accrued interest that we could not avoid despite substantial principal prepayments.)

This morning, we sent a communication to our entire list of church members, friends, and allies to invite each you to join in pushing us over the top and to do so by the Annual Congregational Meeting on March 19. Yes, we cast our net widely, intentionally. This campaign has always been about inclusion. Whether a person has few resources to give or many, we say “thank you” in the same way—“thank you for considering what gifts this congregation has brought to you, and thank you for considering generosity.” And, yes, we also made this an appeal of short duration, intentionally. We have tried hard to avoid competing with other important church initiatives, including the Church Auction on April 22, paying our fair share to the UUA, and the launch of the Endowment Fund.

Perhaps you are relatively new to the congregation, hearing this remarkable story for the first time, and you would like to participate in this church’s rich history and promise in this way. Perhaps in 2015 your

circumstances did not allow you to participate in the spiritual journey of the campaign, and today your circumstances allow you to contribute. Perhaps you are one of the many who have given over the past two years, and you would give joyfully still in honor of what our church embarked on in 2015, in 2008, or even in 1891. Regardless, we welcome every single gift as a joyful act of generosity.

Three things remain to be done for this capital campaign after the final payment is made. First, we must celebrate the burning of the mortgage. Second, we must provide a means of acknowledging each person's participation in preserving our sanctuary of hope on an on-going basis. Finally, we will report summarizing the values, procedures, and outcomes of this campaign for future reference. As always, your suggestions as to how to carry each of these out is most appreciated.

Whether the old earthquake sign has ever greeted you or not, we all know our church to be a welcoming sanctuary of hope. We now come to church and are greeted by these words:

All are invited to be a part of our ministry to a world that hungers for healing and wholeness. Whoever you are, wherever you come from, whomever you love, whatever your struggle or your hope, you are welcome here.

Retiring our mortgage is something momentous that we have eagerly anticipated. Let's make this final push together to reach our goal and to complete the work described by our campaign theme, "Preserving a Sanctuary of Hope for Generations." Please write "capital campaign" in the memo line of your check or donate online through the church website.

Please address comments or questions to us at cc@uuoakland.org, and thank you for your consideration and amazing support.

For more information please contact the 2015 capital campaign co-chairs at cc@uuoakland.org.

ELLA BAKER CENTER FOR HUMAN RIGHTS FAITH IN ACTION PARTNERSHIP

Submitted by Micky Duxbury

2016 activities

Approximately 25-40 congregants participated at various stages of the 2015 campaign to have 50% of the realignment monies go towards community programs instead of the sheriff's department. The task and asks from the EBC were straightforward: showing up for vigils and demonstrations at the Board of Supervisors. Since that time, there has not been a campaign that garnered the attention and interests of the congregants in the same way. Throughout 2016, EBC has a campaign against the expansion of the county jail for a mental health unit. This campaign and the strategy of total opposition to the mental health expansion were not as compelling as the previous campaign - for a host of reasons too complex for this report.

Micky D. was very engaged this campaign and continues her engagement by being on the Criminal Justice subcommittee of the Mental Health Advisory Board working for a county-wide plan for

alternatives to incarceration of the mentally ill. However, this campaign is very much in the weeds: many meetings, working with board of supervisors and other country stakeholders - not the kind of campaign that would be appropriate or compelling for the church members.

Another campaign that Ella Baker requested our support for was to protest Urban Shield - the highly militarized expo hosted by Alameda County Sherriff's Department. About 15+ congregants went to a half-day demonstration in Pleasanton that showed a fair level of commitment. A team of 5 of us canvassed in Pleasanton a before the expo. We have continued to provide signatures on a petition against the county's support of the expo.

In early 2016, EBC released a national report on the impact of incarceration families and children. Over 20 members attended the release event. Several congregants occasionally attend EBC monthly meeting and some are sustaining members.

Steering committee/organizational structure

With the lack of a clear-cut campaign and the leave taking of several members of the steering committee (one due to conflict with work; another returned to full-time work; others doing other justice work at the church) we gradually stopped meeting. Micky will continue to bring events and petitions to attention of the congregation.

The EBC feels supported by our congregation and know that they can call on us when they have an event or campaign for us to respond to. Many in the congregation continue to feel like stakeholders in the partnership and will show up when asked and continue to support the annual fundraising dinner. (We had 20 members last fall!)

Moving Forward

The current political situation has called many members of the congregation to take active steps around a variety of issues. The Justice Council was formed in the spring of 2016 to create a system that will support the integration of and collaboration between all of the justice work at church. We will consider the intersection of our justice ministries, while we deepen our spiritual values and relationships, and expand our impact both within and beyond our walls.

Since the inauguration, the Justice Council's general meetings have had between 18-20 people interested in doing justice work. This has led to leaders in the EBC partnership (Mickey D.) moving in a different direction. Added to the lack of a specific campaign from EBC, this has translated into our primary focus being the Justice Council that hopes to respond to attacks, appointments, laws, and executive orders. The issues of mass incarceration and criminal justice reform will be taken up as appropriate through the Justice Council and hopefully, in collaboration with others in the congregation. For example, there is an event on mass incarceration where Zachary Norris, the ED of Ella Baker Center will be speaking. Instead of it being supported only through the EBC partnership, it is a co- sponsored event with JTW and ARE – thus already showing signs of greater understanding of the intersection of our justice work and goals.

Church communication:

We have been successful in getting information in the Chalice Chatter and Order of Service on a regular basis. The Justice Council will be creating a new tri-fold for Wendte Hall that will address the Ella Baker work in the context of all the justice work at the church. We will be in dialogue about creative ways to engage people and inform them about upcoming events and activities.

CHURCH BOOKSTORE

Submitted by Ron Weisberg

The Bookstore continues its long tradition of being a welcome spot during coffee hour for newcomers; and those just seeking respite from social anxiety. We also entertain our children with a wide variety of young of age books, stuffed animals and sometimes silly faces. We're always happy to talk literature, poetry and hear others' recommendations for books they've read. Additionally we raise around \$2,000 per year for the church general fund. Finally, the foursome of John, Carol, Carolee and Ron have fun together and enjoy each others' conversation and company. Book donations are always welcome on Sundays; or can be left in the 3rd floor open space.

WOMEN'S RETREAT

Submitted by Kem Tetlow

The 2016 Women's Retreat "Wake Now My Senses" was held May 13-15 at Redwood Glen in Loma Mar, California. It was organized by a new group of Janet McFarland, Debbie Brown, Heather MacLeod, Sarah Letson and Kem Tetlow. Forty-five women and children participated in a variety of workshops, crafts, hiking and other activities, including a Saturday Night Fire Circle and Women's Dance. The event concluded with a Special Sunday Worship Service and a Gratitude Sharing Ceremony. The retreat continued some old traditions, including a Goddess ritual, the Circle of Ages (from youngest to oldest), and started a new one called "Secret Sisters" which was very popular. The retreat was a financial success and provided a warm, spirit-filled respite weekend for all participants.

MEN'S FELLOWSHIP

Submitted by Bob Crowe

Though we immediately wanted to return to Ralston-White in 2017 – we found that the retreat center is so popular it wouldn't be available on the dates we wanted (though we threw our hat in to return for several years after). So in March 2017 we'll have an annotated version of our retreat at our own home at 1st Unitarian Church of Oakland. We expect it to be a uniquely different experience and hope to see many new faces sharing their ideas and creative energy.

EARTH JUSTICE ASSOCIATES

Submitted by Bret Andrews and Jack Macy

In this last year, Earth Justice Associates have engaged with church members in environmental justice-with actions focusing on our church building, our local community, our state, and the national scene

during this tumultuous and challenging time. Opportunities abound for church members to get involved with Earth Justice Associates in engaging for justice for our earth and its inhabitants, including those most vulnerable, many of whom are people of color. We work in expanding circles from our homes to our church to the church's neighborhood and to the broader community and ecosystem.

Here are some of the highlights of Earth Justice activities this last year that we hope will inspire you to join with us more often in more the coming year.:

When our church's old refrigerator died we quickly researched and helped the church get the most energy-efficient and cost-effective replacement, which has reduced our carbon footprint and saved money.

When we heard about the proposal to bring coal trains right into our local community, we got very active on the No Coal Campaign to stop the plan to haul coal by rail into West Oakland and ship it overseas through the Port. That would have had serious impacts on local our health and our global climate. We canvassed in our neighborhoods, put up signs, and attended organizing and city council meetings. We organized Standing on the Side of Love (SSL) actions, and we partnered with other local organizations and faith groups. The campaign was a great success in getting the Oakland City Council to ban the transporting and shipping of coal in Oakland!

As part of our engagement in the No Coal campaign, we put on an Earth Justice worship service, inviting Pastor Ken Chambers from the Westside Missionary Baptist Church, a leader in the campaign, who moved and inspired us with his passionate message of working together across faiths for justice in our community.

We have also helped organize the Alameda Interfaith Climate Action Network, which has been meeting monthly to bring together folks and churches of different faiths to coordinate actions from No Coal to broader state and national climate efforts.

We also engaged in various protests to raise our voices, especially on issues intersecting environmental and racial justice issues. For example, we helped organize an SSL action in San Francisco to join others in supporting the bold native First Nations resistance against the Dakota Access Pipeline (DAPL) that helped pressure the Obama Administration to pursue more complete environmental review. Now that the campaign has shifted to fighting Trump's expedited pipeline approval without environmental review, we are focusing on encouraging church members to join the divestment movement against banks who are supporting the DAPL and other climate destructive pipeline projects.

Back in our West Oakland community, we participated in a "Hot August Night" networking and social event host by the West Oakland Environmental Indicators Project, which seeks to bring people together to address air pollution and other environmental justice issues.

Finally, we have been working for years to bring solar power to our community and our church building. We've participated with the Oakland Climate Action Coalition and other groups to form the East Bay

Clean Power Alliance to bring local renewable energy and jobs to our community. This has now finally resulted in creation of the Alameda County non-profit energy supplier, the East Bay Community Energy (EBCE), which will soon offer the option for consumers to purchase 100% renewable electricity. In addition, in recent years we have been reviewing proposals to have solar panels on the church roof. That could reduce our electrical utility costs by half or more. While past proposals have seemed too high, the good news is that prices continue to drop. However, we recently discovered that the roof needs major repair before we can put solar panels on it. So, we are looking at future options to fix the roof and add solar. Stay tuned for more updates and how you can help.

Thanks to all who joined us this year in action and commitment for justice,
Bret Andrews and Jack Macy for Earth Justice Associates

UNITARIAN UNIVERSALIST SERVICE COMMITTEE

Submitted by Emily Stoper

"Guest at Your Table," the annual fund-raiser for the Unitarian-Universalist Service Committee(UUSC), was organized this year by Sherry Larsen-Beville.

Emily Stoper, a member of the UUSC Stewardship Circle, visited Burma in February on a UUSC tour focusing on human rights.

Tom Andrews, the dynamic president and CEO of the UUSC, will speak at this church on the UUSC's work in this country and abroad on April 8, 10 a.m. to noon.



APPENDIX

BOARD OF TRUSTEES NOMINATION GUIDELINE & PRINCIPLES*

The Nominating Committee commits to finding individuals who will bring their professional and/or personal skills and/or passions to our church community; these individuals will also:

- 1) Value and commit to serve in a religious community that is intentionally multi-cultural, multi-racial, multi-generational, and anti-oppressive.
- 2) Dedicate time and skills to serving for the spiritual and social transformation of our congregation, local community/neighborhoods, and society at large.
- 3) Help shape vision and drive commitment to fulfilling our church's Mission and Ends.
- 4) Commit to providing an intentionally affirming environment for and be responsive and accountable to people of differing cultures, sexual orientations, gender identities, economic classes, ages, abilities, theologies, and religious heritages.
- 5) Engage in, and support others in, the process of deconstructing power, privilege, and institutionalized oppression within, among, and beyond our congregation.

* Please note: the criteria for service on our Board was guided by the following church documents: Church Covenant, Church Mission, Church Ends Statements, Church Bylaws, Board of Trustees Policies, and Journey Towards Wholeness Team Mission Statement.

BOARD OF TRUSTEE'S PREFERRED SKILLS AND EXPERIENCE[†]

TALENTS, EXPERIENCES, SPECIAL KNOWLEDGE OR ABILITIES

- Ability to be flexible and make difficult decisions that may not be personal preference but best for the church
- Ability to actively engage with members, including staffing tables, speaking at newcomer breakfast, making stewardship follow up calls
- Willingness to attend 2 ½ hour monthly Board Meetings, plus an additional 2-5 hours preparation for meeting
- Willingness to regularly communicate with congregation

SKILLS OF PARTICULAR IMPORTANCE TO SERVING ON THE BOARD

- Finance and Budget analysis
- Policy Governance
- Development
- Stewardship
- Non-profit leadership,
- Human Resources
- Conflict Resolution
- Public engagement and speaking

[†] Excerpted from 2015 BoT Nomination Form

First Unitarian Church of Oakland

Budget vs. Actuals: First Unitarian Church of Oakland - FY16 P&L

January - December 2016

	Total			
	Actual	Budget	over Budget	% of Budget
Income				
4100 Revenue - Non- UBI			0.00	
4101.1 Rental Income	63,695.00	51,000.00	12,695.00	124.89%
4102 Bookstore Sales & Costs			0.00	
4102.1 Bookstore Sales (Includes Tax)	575.00	96.00	479.00	598.96%
4102.2 Cost of Goods Sold - Bookstore	-421.60	0.00	-421.60	
Total 4102 Bookstore Sales & Costs	\$ 153.40	\$ 96.00	\$ 57.40	159.79%
4103 Religious Ed. & Fam. Ministries		0.00	0.00	
4103.1 Adult Faith Development (R.E.)	880.00	400.00	480.00	220.00%
4103.2 Children Fam Minist (Ed Fees)	925.00	200.00	725.00	462.50%
4103.3 CFM 2nd Night Vespers Dinners		0.00	0.00	
4103.4 Youth Trip Underwriting	1,913.80		1,913.80	
4103.42 Youth Trip	1,940.00		1,940.00	
4103.8 Coming Of Age (Ed. fees)	1,625.00	0.00	1,625.00	
4103.9 Our Whole Lives (OWL Ed fees)	2,325.00	0.00	2,325.00	
Total 4103 Religious Ed. & Fam. Ministries	\$ 9,608.80	\$ 600.00	\$ 9,008.80	1601.47%
4104 Retreats & Weekends		0.00	0.00	
4104.1 Men's Retreat		0.00	0.00	
4104.11 Men's Retreat Underwriting	259.98	0.00	259.98	
4104.12 Men's Retreat Registration	4,175.00	0.00	4,175.00	
Total 4104.1 Men's Retreat	\$ 4,434.98	\$ 0.00	\$ 4,434.98	
4104.2 Annual Retreat		0.00	0.00	
4104.21 Annual Retreat Underwriting		0.00	0.00	
4104.22 Annual Retreat Registration		0.00	0.00	
Total 4104.2 Annual Retreat	\$ 0.00	\$ 0.00	\$ 0.00	
4104.3 Women's Retreat		0.00	0.00	

4104.31 Women's Retreat Underwriting	190.00	0.00	190.00		
4104.32 Women's Retreat Registration	8,540.00	0.00	8,540.00		
Total 4104.3 Women's Retreat	\$ 8,730.00	\$ 0.00	\$ 8,730.00		
4104.5 LEAD Weekend Leadership Retreat		0.00	0.00		
4104.52 Leadership Retreat Registration		0.00	0.00		
Total 4104.5 LEAD Weekend Leadership Retreat	\$ 0.00	\$ 0.00	\$ 0.00		
4104.6 Social Justice		0.00	0.00		
4104.61 Beloved Conv. Retreat U/W	204.99	0.00	204.99		
4104.62 Beloved Conv. Registration	4,080.00	0.00	4,080.00		
4104.65 Faith in Action Ministry	4,005.00	0.00	4,005.00		
Total 4104.6 Social Justice	\$ 8,289.99	\$ 0.00	\$ 8,289.99		
Total 4104 Retreats & Weekends	\$ 21,454.97	\$ 0.00	\$ 21,454.97		
4105 Community Building Revenue		0.00	0.00		
4105.1 Sunday Lunch		0.00	0.00		
4105.2 Hospitality Hour	14.00	0.00	14.00		
4105.9 Fellowship - Other		0.00	0.00		
Total 4105 Community Building Revenue	\$ 14.00	\$ 0.00	\$ 14.00		
4107 Programs & Events - Other		0.00	0.00		
4107.1 Food Bank/Pantry		0.00	0.00		
4107.2 Sizzle T-Shirts	60.00		60.00		
Total 4107 Programs & Events - Other	\$ 60.00	\$ 0.00	\$ 60.00		
4110 Other Program Fees		0.00	0.00		
4118 As Fiscal Agent Admin. Fees		0.00	0.00		
4119 Interest & Dividend Income	101.04	0.00	101.04		
4120 Miscellaneous Revenue	9,853.89	0.00	9,853.89		
Total 4100 Revenue - Non- UBI	\$ 104,941.10	\$ 51,696.00	\$ 53,245.10	203.00%	
4150 Revenue - UBI		0.00	0.00		
4151 Business Advertising		0.00	0.00		
Total 4150 Revenue - UBI	\$ 0.00	\$ 0.00	\$ 0.00		
4200 Unrestricted Support			0.00		
4201 Unrestricted Support			0.00		
4202 Operating Pledge Revenue		0.00	0.00		
4202.03 2015 Pledge Revenue	865.75	0.00	865.75		

4202.04 2016 Pledge Revenue	362,388.41	403,132.00	-40,743.59	89.89%	
4202.05 2017 Operating Pledge	24,562.41		24,562.41		
Total 4202 Operating Pledge Revenue	\$ 387,816.57	\$ 403,132.00	-\$ 15,315.43	96.20%	
4203 One Time Gifts	51,728.05	9,000.00	42,728.05	574.76%	
4204 Collection Plate	10,640.50	9,000.00	1,640.50	118.23%	
4205 Unrestricted Income from Endowm			0.00		
4205.1 Boston-UUA-George E. Grant #195	593.19	0.00	593.19		
4205.2 Boston-UUA-Grant Memorial #196	1,189.38	0.00	1,189.38		
4205.3 Boston-UUA-First Unitarian Mem.	6,018.76	8,200.00	-2,181.24	73.40%	
4205.4 Bruml Trust Income	6,037.81	6,000.00	37.81	100.63%	
4205.5 Boston-C.B. Hamilton Trust Incm	28,266.89	26,000.00	2,266.89	108.72%	
4205.6 UUCEF Wendte Building Endowment	68,444.00		68,444.00		
Total 4205 Unrestricted Income from Endowm	\$ 110,550.03	\$ 40,200.00	\$ 70,350.03	275.00%	
4230 Miscellaneous Receipts	221.00		221.00		
4300 Fundraising Events			0.00		
4301 Auction			0.00		
4301.1 Auction Underwriting	48.91		48.91		
4301.2 Annual Auction Proceeds		14,000.00	-14,000.00	0.00%	
Total 4301 Auction	\$ 48.91	\$ 14,000.00	-\$ 13,951.09	0.35%	
4302 Ad Book		0.00	0.00		
4303 Coffee Houses (uTunes)		0.00	0.00		
4304 Crafts Fair		500.00	-500.00	0.00%	
4305 Concerts	3,660.00	2,500.00	1,160.00	146.40%	
4306 E-Scrip	113.24	0.00	113.24		
4307 Spirit Fund		0.00	0.00		
4308 Musicopia		0.00	0.00		
4309 U4iQ		0.00	0.00		
Total 4300 Fundraising Events	\$ 3,822.15	\$ 17,000.00	-\$ 13,177.85	22.48%	
Total 4201 Unrestricted Support	\$ 564,778.30	\$ 478,332.00	\$ 86,446.30	118.07%	
4500 Temporarily Restricted Support			0.00		
4504 R-Hamilton Hall CapitalCampaign	143,010.12	60,000.00	83,010.12	238.35%	Capital Ca
4510 Gifted Life Insurance	0.00		0.00		
4511 R-Journey Toward Wholeness	5,390.00		5,390.00		

4513 R -Musicopia	1,387.86		1,387.86		
4515 R-Chalice Camp	5,750.00		5,750.00		
4516 R-Div. of Ministry - DOM Grant			0.00		
4516.2 Tom Haw DOM Matching Fund	7,194.00	7,194.00	0.00	100.00%	
Total 4516 R-Div. of Ministry - DOM Grant	\$ 7,194.00	\$ 7,194.00	\$ 0.00	100.00%	
4525 Fund to the Future			0.00		
4525.3 2015 Faith in Action		0.00	0.00		
Total 4525 Fund to the Future	\$ 0.00	\$ 0.00	\$ 0.00		
Total 4500 Temporarily Restricted Support	\$ 162,731.98	\$ 67,194.00	\$ 95,537.98	242.18%	
Total 4200 Unrestricted Support	\$ 727,510.28	\$ 545,526.00	\$ 181,984.28	133.36%	
4526 Stewardship Underwriting	100.00		100.00		
Total Income	\$ 832,551.38	\$ 597,222.00	\$ 235,329.38	139.40%	
Gross Profit	\$ 832,551.38	\$ 597,222.00	\$ 235,329.38	139.40%	
Expenses					
5100 Payroll & Related			0.00		
5110 Salaries & Wages			0.00		
5111 Ministers			0.00		
5111.1 Sr. Minister	30,555.99	0.00	30,555.99		
5111.3 Community Minister - DOM	36,985.14	56,274.00	-19,288.86	65.72%	
5111.6 Interim Minister		0.00	0.00		
5111.7 Contract Minister	46,148.66	54,901.00	-8,752.34	84.06%	
Total 5111 Ministers	\$ 113,689.79	\$ 111,175.00	\$ 2,514.79	102.26%	
5112 Other Salaried Staff			0.00		
5112.1 Church Manager		0.00	0.00		
5112.2 Facilities Manager	48,982.22	51,190.00	-2,207.78	95.69%	
5112.4 Administrative Assistant	11,456.00	9,600.00	1,856.00	119.33%	
5112.5 Accompanist	18,153.60	19,377.00	-1,223.40	93.69%	
5112.8 Church Administrator	47,953.75	51,767.00	-3,813.25	92.63%	
Total 5112 Other Salaried Staff	\$ 126,545.57	\$ 131,934.00	-\$ 5,388.43	95.92%	
5113 Hourly & Project Staff		0.00	0.00		
5113.01 Sexton		0.00	0.00		
5113.02 Facilities/Custodial	16,509.68	18,304.00	-1,794.32	90.20%	
5113.03 RE Teachers	350.00	0.00	350.00		

5113.04 RE Assistants		0.00	0.00		
5113.05 Nursery Attendant	3,145.98	3,300.00	-154.02	95.33%	
5113.06 Guest/Staff Musicians		0.00	0.00		
5113.09 Spirit Games Leader	1,232.10	0.00	1,232.10		
5113.11 Director of CFM	14,696.67	22,477.00	-7,780.33	65.39%	
5113.13 Sunday Morning Assistant	6,332.75	5,696.00	636.75	111.18%	
5113.15 Church Musician Stipend	4,000.10	4,000.00	0.10	100.00%	
5113.16 Sound Engineer	5,507.97	9,152.00	-3,644.03	60.18%	
5113.20 Others		0.00	0.00		
Total 5113 Hourly & Project Staff	\$ 51,775.25	\$ 62,929.00	-\$ 11,153.75	82.28%	
5115 Independent Contractors			0.00		
5115.01 Guest Musicians	2,080.00	1,500.00	580.00	138.67%	
5115.04 Music Consultant		0.00	0.00		
5115.05 Guest Ministers	550.00	1,200.00	-650.00	45.83%	
5115.06 Child Care	110.00	0.00	110.00		
5115.08 Accounting Consultant	20,000.00	20,000.00	0.00	100.00%	
5115.09 Summer Musicians		0.00	0.00		
5115.13 Choir Conductor	12,500.00	12,500.00	0.00	100.00%	
5115.20 Independent Contractors - Other	4,651.97		4,651.97		
Total 5115 Independent Contractors	\$ 39,891.97	\$ 35,200.00	\$ 4,691.97	113.33%	
Total 5110 Salaries & Wages	\$ 331,902.58	\$ 341,238.00	-\$ 9,335.42	97.26%	
5120 Professional & Staff Benefits			0.00		
5123 Pension Plan Contributions			0.00		
5123.1 Sr. Minister Pension Contr.	2,733.32	0.00	2,733.32		
5123.10 Interim Minister Pension		0.00	0.00		
5123.11 Contract Minister Pension	4,345.23	5,100.00	-754.77	85.20%	
5123.3 Church Manager Pension Contr.		0.00	0.00		
5123.4 Fac. Mgr. Pension Contr.	4,680.00	4,680.00	0.00	100.00%	
5123.8 Church Administrator	4,812.00	4,809.00	3.00	100.06%	
5123.9 CommunityMin.DOM Pension Contr.	3,611.67	5,228.00	-1,616.33	69.08%	
Total 5123 Pension Plan Contributions	\$ 20,182.22	\$ 19,817.00	\$ 365.22	101.84%	
5124 Medical Insurance			0.00		
5124.1 Sr. Minister - Medical Ins.	160.92		160.92		

5124.11 DOM Minister Medical Ins		465.00	-465.00	0.00%	
5124.12 Contract Minister Medical	7,828.72	4,329.00	3,499.72	180.84%	
5124.4 Facilities Mgr. - Medical Ins.	12,834.04	7,502.00	5,332.04	171.07%	
5124.8 Church Administrator	7,695.34	5,135.00	2,560.34	149.86%	
5124.9 Medical Administration Fee	-412.60	0.00	-412.60		
Total 5124 Medical Insurance	\$ 28,106.42	\$ 17,431.00	\$ 10,675.42	161.24%	
5125 Parking			0.00		
5125.1 Sr. Minister Parking	-311.58		-311.58		
5125.5 Faith in Action Minister Parking	-588.52		-588.52		
5125.9 Other Parking	2,475.00		2,475.00		
Total 5125 Parking	\$ 1,574.90	\$ 0.00	\$ 1,574.90		
5126 Professional Expenses			0.00		
5126.01 PE-Sr. Minister	562.31		562.31		
5126.04 PE-Church Manager		0.00	0.00		
5126.06 PE-Community Minister - DOM	1,221.51	5,228.00	-4,006.49	23.36%	
5126.07 PE-Dir. Children&Family Ministr	404.89	500.00	-95.11	80.98%	
5126.08 PE-Church Administrator	237.55	250.00	-12.45	95.02%	
5126.09 PE-Choir Conductor		1,050.00	-1,050.00	0.00%	
5126.10 PE-Church Musician		0.00	0.00		
5126.11 PE Interim Minister		0.00	0.00		
5126.12 Contract Minister	7,121.07	5,100.00	2,021.07	139.63%	
Total 5126 Professional Expenses	\$ 9,547.33	\$ 12,128.00	-\$ 2,580.67	78.72%	
5129 Other Payroll Costs			0.00		
5129.1 Payroll Taxes	12,837.87	13,000.00	-162.13	98.75%	
5129.10 Unemployment Insurance		1,000.00	-1,000.00	0.00%	
5129.2 Workers' Compensation Ins.		0.00	0.00		
5129.4 Payroll Service	3,074.05	0.00	3,074.05		
5129.9 Hiring Costs		0.00	0.00		
Total 5129 Other Payroll Costs	\$ 15,911.92	\$ 14,000.00	\$ 1,911.92	113.66%	
Total 5120 Professional & Staff Benefits	\$ 75,322.79	\$ 63,376.00	\$ 11,946.79	118.85%	
Total 5100 Payroll & Related	\$ 407,225.37	\$ 404,614.00	\$ 2,611.37	100.65%	
5200 Building / Facilities			0.00		
5201 Supplies/Equipment	6,705.46	7,000.00	-294.54	95.79%	

5202 Utilities	21,689.97	16,000.00	5,689.97	135.56%	
5203 Bldg. Service & Maint.	16,271.21	12,000.00	4,271.21	135.59%	
5204 Bldg. Loan Interest		0.00	0.00		
5205 Facilities Needs	3,588.50	3,800.00	-211.50	94.43%	
5211 Facilities Reserve	-5,000.00	1,200.00	-6,200.00	-416.67%	
5299 Property Tax - Alameda County	10,348.21	2,150.00	8,198.21	481.31%	
Total 5200 Building / Facilities	\$ 53,603.35	\$ 42,150.00	\$ 11,453.35	127.17%	
5300 General & Administrative			0.00		
5301 Office Supplies	2,181.28	2,000.00	181.28	109.06%	
5302 Postage & Delivery	300.47	1,000.00	-699.53	30.05%	
5303 Copier Rentals	8,645.41	7,900.00	745.41	109.44%	
5304 Copier Useage	1,269.34	-400.00	1,669.34	-317.34%	
5306 Telephone	6,956.19	5,220.00	1,736.19	133.26%	
5307 Internet Usage & Site	3,560.51	2,660.00	900.51	133.85%	
5308 IT Support	623.00	4,000.00	-3,377.00	15.58%	
5310 Operating Reserve	9,000.00	9,000.00	0.00	100.00%	
5320 Insurance	13,476.23	19,000.00	-5,523.77	70.93%	
5320.1 Building	3,349.91		3,349.91		
5320.4 Umbrella Insurance Coverage	1,913.00		1,913.00		
Total 5320 Insurance	\$ 18,739.14	\$ 19,000.00	-\$ 260.86	98.63%	
Total 5300 General & Administrative	\$ 51,275.34	\$ 50,380.00	\$ 895.34	101.78%	
5800 Finance Charges			0.00		
5801 Bank Charges	271.92	700.00	-428.08	38.85%	
5802 Fees VANCO and Other	4,053.66	5,000.00	-946.34	81.07%	
5803 Non-Profit Assoc. Fees	125.00		125.00		
Total 5800 Finance Charges	\$ 4,450.58	\$ 5,700.00	-\$ 1,249.42	78.08%	
5900 Other Expenses			0.00		
5916 Food, Drinks, & Supplies	167.98		167.98		
5950 Miscellaneous	1,312.21	0.00	1,312.21		
Total 5900 Other Expenses	\$ 1,480.19	\$ 0.00	\$ 1,480.19		
6103 Religious Ed & Fam Ministries			0.00		
6103.2 Children Fam. Ministries (CFM)	1,063.20	1,000.00	63.20	106.32%	
6103.21 6103.21 Youth Trip	1,273.00		1,273.00		

6103.22 6103.22 CFM Youth Trip	2,853.00		2,853.00		
6103.8 Religious Ed - Coming of Age	531.45	0.00	531.45		
6103.9 Religious Ed - OWL	2,846.78		2,846.78		
Total 6103 Religious Ed & Fam Ministries	\$ 8,567.43	\$ 1,000.00	\$ 7,567.43	856.74%	
6104 Retreats & Weekends		0.00	0.00		
6104.1 Men's Retreat Expense	5,178.99		5,178.99		
6104.3 Women's Retreat Expense	6,384.39		6,384.39		
Total 6104 Retreats & Weekends	\$ 11,563.38	\$ 0.00	\$ 11,563.38		
6300 Cost of Fund Raising Events	197.08	4,000.00	-3,802.92	4.93%	
6301 Cost of Auction		0.00	0.00		
6311 Sizzle T Shirts	888.00		888.00		
Total 6300 Cost of Fund Raising Events	\$ 1,085.08	\$ 4,000.00	- \$ 2,914.92	27.13%	
6500 Program Groups			0.00		
6502 Journey Toward Wholeness (JTW)	5,229.51	1,500.00	3,729.51	348.63%	
6503 Interweave		500.00	-500.00	0.00%	
6505 Board of Trustees	336.38	500.00	-163.62	67.28%	
6506 Stewardship Committee	497.92	500.00	-2.08	99.58%	
6508 Young Adult Group	217.88	500.00	-282.12	43.58%	
6509 Beloved Conversations			0.00		
6509.1 Rev. J Justice		0.00	0.00		
6509.2 Rev. J. Membership	150.70	1,000.00	-849.30	15.07%	
6509.3 Faith in Action		1,000.00	-1,000.00	0.00%	
6509.4 Beloved Conversations Expenses	3,135.28		3,135.28		
Total 6509 Beloved Conversations	\$ 3,285.98	\$ 2,000.00	\$ 1,285.98	164.30%	
6510 Conferences (Mosaic Members, etc.)	274.72	3,000.00	-2,725.28	9.16%	
6511 Pastoral Care		500.00	-500.00	0.00%	
6580 Program Groups - Other Support			0.00		
6580.01 Communtiy Life		0.00	0.00		
Total 6580 Program Groups - Other Support	\$ 0.00	\$ 0.00	\$ 0.00		
6590 Program Expenses			0.00		
6592 Music	-177.70	500.00	-677.70	-35.54%	
6593 Worship/Music	703.95	600.00	103.95	117.33%	
6594 General Program Supplies	127.53	250.00	-122.47	51.01%	

Total 6590 Program Expenses	\$ 653.78	\$ 1,350.00	-\$ 696.22	48.43%		
Total 6500 Program Groups	\$ 10,496.17	\$ 10,350.00	\$ 146.17	101.41%		
6700 Denominational Support			0.00			
6701 UUA Support	9,000.00	9,000.00	0.00	100.00%		
6702 PCD Support	4,500.00	4,500.00	0.00	100.00%		
Total 6700 Denominational Support	\$ 13,500.00	\$ 13,500.00	\$ 0.00	100.00%		
6800 Ministerial Events			0.00			
6802 Ordination Expense		1,000.00	-1,000.00	0.00%		
6803 Minister Installation Expenses		1,000.00	-1,000.00	0.00%		
Total 6800 Ministerial Events	\$ 0.00	\$ 2,000.00	-\$ 2,000.00	0.00%		
6900 Endowment Donor Additions			0.00			
6905.6 UUCEF Wendte Building Endowment	69,816.00		69,816.00			
Total 6900 Endowment Donor Additions	\$ 69,816.00	\$ 0.00	\$ 69,816.00			
8920 HHR-Non-Capitalized Expenses			0.00			
8920.2 Loan Interest (PostConstruct.)	47,368.37	60,000.00	-12,631.63	78.95%		
Total 8920 HHR-Non-Capitalized Expenses	\$ 47,368.37	\$ 60,000.00	-\$ 12,631.63	78.95%		
9995 Gain/Loss on sale of stock	12.43		12.43			
9996 Gain/Loss Endowments	-1,372.00		-1,372.00			
Total Expenses	\$ 679,071.69	\$ 593,694.00	\$ 85,377.69	114.38%		
Net Operating Income	\$ 153,479.69	\$ 3,528.00	\$ 149,951.69	4350.33%		
Other Expenses						
Reconciliation Discrepancies-1	-350.01		-350.01			
Total Other Expenses	-\$ 350.01		-\$ 350.01			
Net Other Income	\$ 350.01	\$ 0.00	\$ 350.01			
Net Income	\$ 153,829.70	\$ 3,528.00	\$ 150,301.70	4360.25%		
Subtract Capital Campaign Pledges Received	-\$ 143,010.12					
Net Operations	\$ 10,819.58					

Monday, Feb 20, 2017 11:47:51 AM GMT-8 - Cash Basis

2017 Budget - First Unitarian Church of Oakland

Income	\$
Confirmed Pledges	\$440,749
3% loss on pledging	-\$13,222
Other income (Auction, offerings, rentals, funds)	\$120,100
One-Time Donations (includes \$8000 in one-time stewardship gifts)	\$18,000
Draw from Mary Ann and Tom Haw Fund for Community Ministry	\$32,157
From Capital Campaign Fund for Mortgage	\$25,010
Total Income	\$622,794
Expenses	
Minister Compensation & Benefits (fair share) (1 minister at 100% time and 1 at 50% time)	\$169,217
Staff Compensation & Benefits (All follow fair share guidelines)	\$264,859
Facilities upkeep, utilities, tax & insurance	\$40,900
Administrative, Copier, Phone, IT, bank fees, misc, cost of fundraising	\$52,350
Program expenditures and Minister events	\$15,350
UUA + regional dues (at 100% of Fair Share)	\$23,640
Mortgage	\$25,010

NEW Sabbatical/Leave Fund	\$22,157
Facilities repair and Operating reserve	\$9,200
Total Expenses	\$622,683
Surplus in Budget as Passed 2/28/17	\$111
Questions? send to board@uuoakland.org	