

First Unitarian Church of Oakland



Annual Congregational Meeting

September 20, 2020, 10:30 AM
Online on Zoom

YOU ARE THE ONES YOU'VE BEEN WAITING FOR

Immediate opportunities for service here at First Oakland

Good people, while most groups, programs, and committees are open to any interested congregants, the following have particularly pressing needs at this time:

PROGRAM	NEED	IF INTERESTED, PLEASE CONTACT:
Board of Trustees	Made up of 9-12 members Voting today on additional members Could use a treasurer-in-training	board@uuoakland.org
Stewardship	Plans to initiate a year-round Stewardship program	stewardship@uuoakland.org
Operations Team	Made up of up-to-5 members. Currently has 4 members.	operationsteam@uuoakland.org
Nominating Team	Made up of up-to-3 members Looking today for members	boardnomination@uuoakland.org
Program Council	Looking for a monthly facilitator, and monthly agenda-maker	programcouncil@uuoakland.org
Committee on Shared Ministry	Made up of up-to-9 members, four current vacancies	sharedministry@uuoakland.org
Community Connections Team	Warmly welcomes new greeters, ushers, and other "connectors"	connectionsteam@uuoakland.org
Journey Toward Wholeness	Membership maintains a balance between people of color and white congregants	JTW@uuoakland.org
Leadership Development	Team just forming now from scratch	lprobert@comcast.net
Pastoral Associates	3 members rolled off in the last six months	pastoralcare@uuoakland.org

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Agenda

10:30 am	Devotion - Pastor Theresa Soto and Worship Associates
10:50	<p>Welcome and Call to Order - Rinda Bartley, President, Board of Trustees</p> <ul style="list-style-type: none"> ● Reading of Congregational Covenant ● Installation of Moderator <ul style="list-style-type: none"> ○ Motion to elect Jane Voytek as Moderator - Dan Wright, Secretary, Board of Trustees ○ Review agenda and rules of order - moderator ● Quorum Count - Secretary of Annual Meeting - Kris Wedding-Crowell
11:10	<p>Congregational Business - Moderator</p> <ul style="list-style-type: none"> ● Explanation of ballot and voting ● Changes to the bylaws ● Election of Trustees
11:25	State of the Church - Pastor Theresa Soto - Lead Minister
11:40	Financial Report - Jodie Mathies, for the Finance Team
11:55	<p>Board initiatives</p> <ul style="list-style-type: none"> ● Stewardship - Rinda Bartley ● Board Learning Goals - Steve Thomasberger
12:05	<p>Recognition of outgoing Trustees</p> <ul style="list-style-type: none"> ● Dick Bailey, Michael Rothhammer - Tara Noone ● Tara Noone, Alanna Kelly - Kathy Radez ● All - Pastor Theresa Soto
12:15	Announcement of Voting Results for Election of Trustees - Moderator
12:20	Invitation to Church service - Alanna Kelly
12:25	Benediction and Closing Words - Pastor Theresa Soto
12:30	Adjourn Annual Meeting - Moderator

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 to 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 goals 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.

Eligibility to Vote in Annual Meetings and All Special Meetings

In order to be eligible to participate in congregational votes, a person must have signed the membership book and made a pledge by the last Sunday of the month preceding the meeting.

Annual Meeting Rules of Order

1. The quorum for all business meetings of the Membership shall be twenty-five (25) percent of Members eligible to vote as of the most recent record date.
2. In accordance with the bylaws, only members of the congregation may vote. A simple majority of members present will be sufficient to act on behalf of the entire membership.
3. 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.
4. Nominations and other voted-upon issues, whether private ballot, show of hands, or other means, must be passed by a majority (>50%) of eligible voters present at the meeting, unless a higher threshold has been called for. 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 voters, a majority is characterized when there are 56 votes in favor. 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.
5. 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.
 - d. Any modification of the rules is at the discretion of the Moderator
6. All speakers at the annual meeting must make use of the microphones to speak [when meeting in person].
7. Before speaking, speakers must be recognized by the Moderator.
8. Robert's Rules of Order apply, except that the above rules will prevail in the event of conflict.

Proposed Changes to the By-Laws

Board action 2/25/20: Article 5, Section 9 Consensus to propose striking the word “preceding” will be put to vote at the annual meeting.

Article IV: Membership

Sec. 2.

In order to ~~become~~ **be** a member (“Member”), a person must sign the membership book maintained by the Church and **annually** make a pledge of record or receive a waiver from a Minister consistent with church policy in the case of financial limitation.

Article V: Meetings of the Congregation

Sec. 9. Record Date

The date upon which voting eligibility shall be determined, hereinafter the “record date,” shall be the last Sunday of the month preceding the Annual Meeting, or any ~~preceding~~ Special Meeting.

Board of Trustees Candidate Bios

Alanna J. Kelly

Greetings FUCO! Some of you know a bit about me, and I’d like all of you to know a bit more.

I’m a white, left of left, mostly heterosexual, currently able-bodied, chronically mentally ill, cis-gender woman and mother. My two children are William (age 6) and Abby (age 4). We’ve been attending FUCO since October 2017. When I saw the role lay leadership plays in our congregation, I knew there was a strong opportunity here for me to serve others, as I am that odd type of person who loves to speak publicly and I thought I would have helpful things to share with you. I joined in May of 2018 and immediately applied to be a Worship Associate. I assisted with my first service in July of 2018. In June of 2019, I led a service with Susan Keiter as my WA and gave a sermon on the subject of love. Many of you have been kind enough to let me know how much you’ve enjoyed my WA work, and that feedback has given me the confidence to reach out toward the opportunity to serve on the Board of Trustees.

My personal, spiritual, and moral goals for myself include continually working to bend the arc of the future toward justice, which are goals I’m sure I share with many members of both the Board and FUCO. I have anti-racism training, and experience in leading workshops that aim to de-center whiteness and raise race-awareness among white people. I regularly pay reparations

to People of Color, especially Black Femmes. I am keen to discuss and more importantly, create, enhance, and/or support more restorative justice activity at FUCO. Specifically, I want to help educate and encourage the regular paying of reparations in all of our white congregants who have money to spare. I want to help FUCO make strides in hiring more POC, especially Black people, for paid work in the church, be it as artists, musicians, and or speakers, or to assist FUCO with operations. This place is rich with interest and ideas, and I want to be part of an enlivenment of action.

In faith,
Alanna Jane Kelly

Meri Nieda Lane

Hello friends. I identify as a Japanese American, cisgender, heterosexual woman. Trained as an attorney, I left the profession years ago to care for my now multi-generational household: me, helpful husband Jeff, tabby cat Nima, 96 year old mom Rose (still sharp, charming and hilarious) and two adult sons with autism, William and Jackson (the latter living on his own, which means we see him every day for dinner, but thankfully not his room). Previously unchurched and undone by the 2016 election, I came to UU Oakland looking for hope, which I found in abundance. In three years of attendance and two as a member, you gave me welcome, challenge and meaning in many ways, among them, the Monday Covenant Group, JTW meetings, direct actions organized by the Justice Council, the 150th Anniversary Celebration Committee, and the Women's and All Church retreats. With two years of prior board service for a small, independent school and many more in fundraising, I now want to contribute what I can to this place that offered food when my soul was hungry, empowered me when I felt weak and gave hope when I had none. I want to share more deeply in the care of this community, our house for hope.

Thanks,
Meri

Kathy Vermazen Radez

I identify as a white, hetero, cis-gendered woman. I'm also a mother, a civil rights lawyer, an Iowan-turned-Oaklander, and a Presbyterian-turned-Unitarian Universalist. Along with my husband, Wes, and son, Aaron (age 6), I have been a friend and member of UU Oakland for more than 5 years. The church is part of what attracted me to the neighborhood, and it has become a focal point of our family life here in downtown Oakland.

Since joining this community, I have been an active member of our Ella Baker partnership team (primarily 2014-2015) and the children and family ministries team. I co-chaired our all-church retreat in 2018 and 2019. Throughout this time, I have participated in Beloved Conversations, First Sundays, and other anti-racism programs at the church. And this year, after reflecting on

the experience of my own multi-cultural family within this community, I joined our Journey Toward Wholeness Transformation Team as part of a “job share” with Wes.

Throughout my time at UU Oakland, I have found true the adage that “the more you give, the more you get.” Yet I see barriers that prevent others from enjoying the same level of welcome and engagement that I have experienced in this beloved community. As our community continues to grapple with diversity, equity, and inclusivity within and beyond our walls, I see an opportunity to lend my energy and experiences to help align our practices with our values. And while I would welcome the opportunity to take a leadership role in our community, I will equally welcome the opportunity to stand aside for others to lead -- particularly people of color and others historically have been decentered in our faith and our congregation.

Deborah Kaplan

Deborah Kaplan is the Deputy Director for Programmatic Access with the San Francisco Mayor’s Office on Disability, where she oversees ADA compliance and complaint operations and lends expertise in disability policy issues. She recently started Enterprise Accessibility, a consulting business, and before that she held a central role in the federal government working on implementation of technology accessibility requirements. At the World Institute on Disability, she was Executive Director for several years, and before that she pioneered projects on technology policy focused on universal design and community engagement. She also headed the Accessibility Technology Initiative for the California State University System. She is a member of the Steering Council of the Web Accessibility Initiative of the World Wide Web Consortium (W3C) and she was on the founding Board of the California Emerging Technology Fund. She has a law degree from UC Berkeley, and she has lived in cohousing for over 15 years.

Ministers’ Reports

Lead Minister

Submitted by Pastor Theresa Soto

As I write this, it has nearly been a year since I first met the search committee who would bring me to this beloved congregation. In that year, I pre-candidated at the Unitarian Universalist congregation in Hayward, spent a week with you and candidated with you. The result was a joyful 97% vote to call, for which I remain grateful. I moved to Oakland from southern Oregon and began living and worshipping with you.

We’ve journeyed together as my father Victor struggled with a life-threatening illness, which the Mayo Clinic finally deciphered as St. Louis encephalitis, a rare mosquito-borne fever with about 700 reported cases a year. I am delighted to report that my father is still doing physical therapy and moving back into the activities he loves. You were compassionate and supportive when I

got hit by a car at the beginning of the year. It took some time to recover. I am especially grateful for all the support I got that allowed me to focus on healing when I needed it. Here are some notable events in my first year at First Oakland:

Ministry Start-Up:

September 28, 2019--We were joined by Rev. Tandi Rogers and Rev. Bethany McKinney Fox to talk about the fine points of working together and how to give our shared ministry a strong start.

Community Traditions and Observances:

My first holiday season with the congregation, included the Bread Ceremony, Yule observance, a fantastic holiday concert, and the candlelight Christmas Eve service. There were also beautiful observances of Kwanzaa, the Lunar New Year, including dumpling making.

Tune Up:

On February 8, we gathered to follow-up on what we began to build at the Start-Up. We focused on how we work together. We talked especially about avoiding triangulation by taking things directly to the person accountable to them. Since then, the congregation displayed a concerted effort to keep those lines of communication flowing, which will strengthen and support the work we share.

Governance:

The efforts of the Board of Trustees have continued in tending to the governing functions of the congregation. Board members and operations team members have applied significant effort to making plain with the congregation where additional teamwork and ministry sharing is needed in the open positions for service to the congregation.

The Program Council is an important part of the community function within the framework of policy governance, especially as a thought partner for the leaders of the congregation. Through the effort and focus on the positions for which partners in service from the congregation were needed, the Board of Trustees and the Operations Team, with the linkage and support of Steve Thomasberger, were able to enlist leadership and support appropriate to the task. This is an element of the transition to policy governance. Another element of that transition is education for the congregation about who handles what kind of questions and how decision-making happens. That element of governance isn't a once-and-done; rather, it is a subject for both continuing conversation and practice.

The Board of Trustees is moving into conversation and discernment about strategic learning goals for the congregation. The goals will help the congregation be able to measure progress in transition and confirm that decisions and actions are in concert with the mission.

Worship, Education, and Justice:

I have been preaching in the congregation between two and three times a month. The members of the worship team and I have spent time working on structures, methods, and relationships. I really enjoy working with the folks who are on that team and are excited about sharing worship

experiences with the congregation. There are facets of worship that are still growing edges (especially the timing of services and transitions.)

I have been teaching Building Multicultural Community, with Laila Ibrahim, who has been fantastic to teach with, no surprise to folks who have benefited from her skill in the past. The Justice Team has participated actively with the Program Council in strengthening governance, much to the benefit of the congregation. The Justice Team has offered speakers and preparation for Share-the Plate, as well as proactive coalition building. Monthly Justice Moments have begun with the goal of educating and inspiring the congregation to action.

Pastoral Care:

Pastoral care is an essential element of the character of the congregation. It continues with the dedicated leadership and care of a team of volunteers, currently attentively organized by John Shinnick. This is another team that functions best when there is a primary emphasis on relationship building, both with the minister and the congregation. The people on this team journey with folks during times of challenge and do so with compassion and dignity. I am grateful for this shared ministry.

Looking forward to our future,
Pastor Theresa

Associate Minister

Submitted by Rev. Dr. Sheri Prud'homme, Associate Minister for Faith Development

It continues to be a pleasure and privilege to serve this vibrant congregation as your half-time associate minister for faith development. Last spring was a time of preparing to say good-bye to Pastor Jacqueline Duhart and prepare for the arrival of a new parish minister. The time of transition continued this program year as we welcome and form a new partnership with our new settled minister, Pastor Theresa Soto.

My portfolio this program year focused on providing leadership and working with congregants on children and family ministries, adult faith development, and leading worship about once a month. With all the transition in the congregation, we decided to keep the program in children and Family Ministries stable during this program year. One place of innovation is in the Chalice Camp curriculum for this coming summer. I am partnering with two students and another faculty person at Starr King School for the Ministry to write a Chalice Camp III Curriculum on Climate, Faith, and Justice. The report from the Children and Family Ministries team is elsewhere in this document. The locus of my creative energy in the spring and fall went into partnering with the adult faith development team and other leaders to generate a series of core courses that would encourage newcomers and long-timers alike to live more fully into our mission.

This church year we added three new courses/groups, each 6-8 weeks long: Spiritual Practices for Courageous and Compassionate Living, Building Beloved Community – Practices for

Multicultural Congregational Life, and What's Next? – Incorporating UU Values into my Life. We will also partner with the UU Society of San Francisco to offer a day-long workshop for church leaders to continue our work dismantling white supremacy culture and creating a multicultural congregation of mutual liberation. A more detailed report for adult faith development is included later in the annual report.

Affiliated Community Minister

Submitted by The Reverend Mary Foran

I am delighted to be a new colleague with Pastor Theresa Soto, celebrating their innovative perspectives, teachings and approaches to church life and supporting their leadership however they ask me to be involved. We have a written covenant of mutual respect and collaboration.

I treasured my creative working relationship with Reverend Sheri Prud'homme and look forward to the same with Interim Religious Education Director, Alex Hader-Winnett.

As an Affiliated Community Minister, I am not part of the church's professional ministerial staff, but instead focus my ministry in the world beyond the congregation. I am a Spiritual Director, guiding and companioning people who want to strengthen their spiritual grounding for participating fully in the delights, sorrows, mysteries and toils of human life. One of the greatest gifts of our time on this earth is cultivating the spiritual resources that help us bring more kindness, compassion, resilience, strength and joy to all the ways we act in the world. I help you find your wisdom by listening, asking questions, inviting silence, sharing laughter and tears, and bringing my full compassionate attention to you.

During the 2019-2020 church year, my focus within the church has been working with the Adult Faith Development Team, helping to coordinate the Dismantling White Supremacy event on March 28, 2020, which was cancelled due to the shelter in place. In addition, through conversations with Pastor Theresa, Reverend Sheri, the Adult Faith Development Team and the People of Color Caucus, I co-created and co-facilitated with my long-time friend and Spiritual Direction colleague, Patricia St. Onge, a ten-week group called Spiritual Practices for Courageous and Compassionate Living. The group launched in January with 12 participants. We held the last few sessions via Zoom. A spin-off Spiritual Direction Group followed.

I am delighted to be in community with you and to be of service as an Affiliated Community Minister.

Board of Trustees

Annual Report submitted March, 2020

Submitted by Rinda Bartley, President

During the 2019-20 church year, the Board of Trustee members were:

Dick Bailey - rotating off

Michael Rothammer - Secretary - rotating off

Tara Noone - completing year two

Hester Green - Treasurer - completing year two

Rinda Bartley - President - completing year two

Steve Thomasberger - Vice President - completing year two

Dan Wright - completing year one

Although the decision was affirmed at the 2019 Annual Meeting to reduce the number of board members from 12 to 9, we were unable to fill two open positions and operated with 7 members all church year. Although this is a very hard-working and dedicated group of church leaders, the absence of two members was felt, and the Board strongly recommends a full slate this year and going forward.

The Board organized itself around six goals this year, with each goal shepherded by an assigned board "Champion". Champions acted as liaison to the board for all activities in support of these goals, helped to move them along and reported regularly in writing and through verbal reports and discussions at board meetings. The six goals and key activities/accomplishments of the year are as follows:

Financial clarity and health - Hester Green and Operations Team, Champions

- Engaged a professional accounting firm, Shining Star, to clean up our financial accounting, establish a new Chart of Accounts and enable us to again produce accurate periodic financial reports. This work is still in progress.
- Approved the 2020 budget in December 2019, in collaboration with the Finance Team and Operations Team.

Ministerial transition - Tara Noone, Champion

- Completing our time with Pastor Jacqueline, including the Farewell Luncheon.
- Organized the special meeting and voting process for Candidating Week for our ministerial candidate in May.
- In the absence of a minister on-call during the summer months, engaged Affiliated Minister Rev. Mary Foran as the summer minister for pastoral care, supporting the Pastoral Associates Team.
- Provided summer supervision for office staff.
- Coordinated the on-boarding process for Rev. Soto, including the Start Up event in September and a Tune Up event in February.

Implementing the JTW Assessment church-wide - Dan Wright, Champion

- Shared the Assessment Report with the Program Council and asked all groups and committees addressed in the report to consider implementing the recommendations.

Stewardship - Hester Green, Rev. Soto, Champions

- Worked with the Stewardship Team to support the annual pledge drive, including personal contacts with many church members and friends.

Policy Governance transition - Steve Thomasberger and Rinda Bartley, Champions

- Moved forward in implementing policy governance by re-establishing the Operations Team and beginning to organize the church Program Council. Two Program Council meetings have been held. Currently the Board VP sits on the Operations Team and acts as liaison between the Operations Team and the Board.
- Requested that the Operations Team have an audit conducted by the Personnel Committee of staff evaluation processes.

Strategic planning - Rinda Bartley, champion

- In order to increase transparency and access of the congregation to board processes, moved every other meeting to after church on Sunday, and implemented an open comment period for members and friends at the start of each meeting. Subsequently moved all meetings back to Tuesday evenings and retained the open comment period at the start of every meeting.
- Organized and facilitated a series of 3 workshops on re-visioning and revitalizing our church Leadership and volunteer processes and practices in October and November.
- Assisted in the planning for the Ministerial Tune-Up event to clarify and strengthen communication, pace and focus of our shared ministry work.

This coming year, we eagerly look forward to welcoming four new board members, establishing a new set of appropriate and timely Board Goals (with an emphasis on strategic planning) and implementing them thoughtfully. The board wished to emphasize to the congregation the need to solidify our governance, communication and decision making processes and to have full participation in our core leadership working groups: The Board, Operations Team, Program Council and Committee on Shared Ministry. We are also looking forward to the Installation of our minister, Rev. Soto in April and to the ordination of Michelle Ma in May.

Update March - September, 2020

Submitted by Rinda Bartley, President, Board of Trustees

This spring and summer have been challenging and certainly different from the experience of any previous Board, but also very meaningful. Like the rest of the world, we scrambled to shift our methods of communicating and being together in order to make the decisions and continue the work of governing the church under these pandemic-induced circumstances. We are motivated by knowing that the church is more important than ever in these confusing, disorienting and spiritually challenging times.

We note that Rev. Soto was clear very early in the pandemic that closing the church was necessary for the safety of everyone, especially our most vulnerable congregants and community members. Their leadership in the intellectual, spiritual and practical issues related to this early decision was key to a relatively smooth transition to this new reality and way of being a church. For this we are extremely grateful.

Key Board practices, issues and decisions, spring and summer 2020

Transparency, congregational involvement and monitoring

- Moved our monthly meetings to zoom immediately in March, and to Sunday afternoons during the Summer to make them more accessible to church member or friend visitors. Visitors receive agendas and the meeting materials in advance of the meeting.
- Start every meeting with a 15 minute open comment period for church member or friend visitors, and saw many more visitors each month than previously.
- Meeting Minutes are promptly posted on the church website as soon as they are approved.

Conscious Process

- With the new board in March, we held 2 orientation sessions and worked to solidify our detailed process agreements so that our work would be efficient, understood by all, transparent and satisfying.
- Have continued with process monitoring from the Journey Toward Wholeness committee members, and have added process monitoring by board members ourselves
- Have experimented with using a “progressive stack” approach to discussions

Fiscal responsibility

- In April, at the request of the Finance Team, approved the procurement of a PPP (Payroll Protection Plan) loan to help sustain us through the pandemic.
- Called for and assisted in a Spring Pledge review with all church pledge units to assess necessary 2020 budget adjustments.
- Worked with the Finance Team to make necessary adjustments to the 2020 budget, and approved the use of only up to ¼ of our available reserve funds.
- In July and August, researched year-round Stewardship models and in August approved a two-year trial of this model. Currently recruiting new Stewardship Team members.

Policy Governance

- Increased mutual understanding of the roles and authority of the Operations Council and its committees to the roles and authority of the Board.
- Established a church-wide learning goal related to evaluating our mission-related work as a church as guided by our Ends Statements: Transformation within, Transformation among and Transformation Beyond.

Respectfully submitted,
 Rinda Bartley,
 President

UU Oakland Trustees 2020:

Alanna Kelly
 Meri Lane
 Kathy Vermazen
 Dan Wright
 Hester Breen
 Steve Thomasberger
 Tara Noone (now resigned)

Operations Team

Submitted by Steve Thomasberger

The Operations Team was established by the Board of Trustees in 2019 and directed to implement Board policies relating to the day-to-day operational needs of the Church. The Team began meeting in April 2019, and welcomed Reverend Theresa in August 2019. The team has met twice a month, and as needed, to address operational needs. Minutes are kept of all meetings and a monthly report is submitted to the Board.

The regular agenda of the Operations Team includes the following areas. Some key activities over the past year have included:

Practices – Shared Ministry

- Discussing the establishment of the Program Council, and its role and responsibilities.
- Created a church safety protocol and directed facilities manager to recruit a safety team.

People and Personnel

- Beginning process to hire office manager and membership coordinator.

Asset Management (Church Facility and Property)

- Assessing the state of the church facility with the facilities manager and overseeing repairs and improvements.
- In process of upgrading church wi-fi and phone systems

Financial Management

- Drafting the 2020 budget in collaboration with the Finance Team.
- Professionalized church bookkeeping.

Members of the Team include: Reverend Theresa Soto, Lead Minister, Venee Call-Ferrer, Congregational Administrator, Steve Thomasberger, Board representative and Team facilitator. In the coming year the Team will be enlarged to include a representative from the Program Council, and a representative from the Finance Team.

Reports from the Congregation

(Reports listed in alphabetical order)

The Accompaniment Team

Submitted by Lauren Poole

“Accompaniment” is a type of faith-based immigration justice work directly supporting those most impacted by current immigration policy - recent immigrants. The UU Oakland Accompaniment Team formed in 2018 as part of the Interfaith Movement for Human Integrity's "Nueva Esperanza" Program. Current team members are Gary Facente, Jane Facente, Lauren Poole, Michael Rothhammer, Marilyn Schumacher and Bev Smrha.

Our team has accompanied a Honduran asylum-seeking family of four. Our purpose was to welcome, support and accompany them as they faced the many challenges of settling into life here. Accompaniment has taken many concrete forms: helping the family to find housing, tutoring one of the children, going with them to immigration court and to medical visits, celebrating birthdays, exploring the Bay Area together. We are grateful to others in the congregation who helped furnish their new home and who donated to holiday gifts.

Perhaps most importantly accompaniment has meant welcoming the family, building human connection and being present in the midst of fear and uncertainty. It has been a very rewarding, challenging and spiritually rich experience for our team.

Accompaniment is conceptualized as time limited and our team will be winding down its formal role in the coming months. We held a meeting in November with Rev Soto and others in the congregation potentially interested in accompaniment. We are hoping that our congregation will have the capacity to form and support a second accompaniment team that would work with a new family. Members of the current team are very willing to support such an effort and the Interfaith Movement for Human Integrity is inviting new teams into its training process.

Adult Faith Development Team

Submitted by Rev. Sheri Prud'homme and Emily Stoper

The Adult Faith Develop Team has offered these programs this year: Rev.

- Rev. Mary Foran and Pat St. Onge offered a very well attended 10-session course, Spiritual Practices for Courageous and Compassionate Living. Rev.
- Rev. Becky Leyser offered a course on Deepening the Church Experience for people who have been in the congregation for at least 3-5 years.
- The Dismantling White Supremacy II training – a day-long antiracism training following up on the first such training offered in March 2019 - was scheduled for March but had to be postponed because of the coronavirus.

Three monthly meetings were offered throughout the year:

- Buddhist Sitting group with Carol Emert
- Book Group with Emily Stoper, and
- Poetry Circle with Ron Weisberg

The team hopes to develop a new program this year, with assistance from the new minister of faith development, Alex Haider-Winnett.

Book Group

Submitted by Emily Stoper

The congregation's book group meets once a month, usually on the 4th Thursday evening, to discuss highly readable nonfiction books, generally under 400 pages. There's a lively core of regular attendees, but drop-ins are always welcome, provided they have read that month's book. Favorite book topics include politics, psychology, history, race relations, ecology and science. Attendance went up significantly this year. If you would like to attend a meeting or to be placed on the group's email list, contact Emily.Stoper@gmail.com. During the pandemic, we are meeting on Zoom.

Here are some of the 12 books we read in the past year:

Evicted: Poverty and Profit in the American City by Matthew Desmond; *Prisoners of Geography: Ten Maps that Explain Everything about the World* by Tim Marshall; *The Gene: An Intimate History* by Siddhartha Mukherjee; *Born a Crime* by Trevor Noah; *Why We Sleep: Unlocking the Power of Sleep and Dreams* by Matthew Walker; *White Fragility: Why It's so Hard for White People to Talk about Racism* by Robin J. DiAngelo; *The Doomsday Machine: Confessions of a Nuclear War Planner* by Daniel Ellsberg; and *How to Change your Mind: What the New Science of Psychedelics Teaches us about Consciousness, Dying, Addiction, Depression and Transcendence* by Michael Pollan.

Book Store

Submitted by Ron Weisberg

We staff the book table during coffee hour, offering books donated by the congregation. We also carry a limited selection of UUA books on the history and principles of Unitarian Universalism. We enjoy chatting with visitors about books they've read and answering questions about the church. We especially enjoy meeting people new to our church and welcoming them. Plans for the coming year are to continue our service. We meet once a year for lunch to celebrate ourselves. Currently, the Book Store is staffed by Carol Wood, John Kelly, and Ron Weisberg.

Children's and Family Ministries Team

Submitted by Nicole Fitzhugh and Nathan Naze

Members of the Program: Rev. Sheri Prud'homme, Nicole Fitzhugh, Sophie Kaiser, Dash Goss-Post, India Miller Morton, Dorothy Paul, Jordan Stephens, Amy Carlson (staff)
Vision Team members (meeting quarterly): Nathan Naze, Megan Wachspress, Kathy Vermazen, Wes Radez, Ingrid Mittermaier, Kris Wedding Crowell, Jenny Berggren
Teacher Volunteers: Becky & Jeff Leyser, Charles Masten, Susan Killebrew, Natalie Ingraham, Hilary Near, David Munro, Xandra Castleton

Our mission is to integrate UU principles into our children's lives with exposure to many kinds of worship and to allow them to build lasting friendships with UU peers, young and old. We lay the foundation for an ethical, principled adulthood with a beloved community. Our innovative approach, responding to the realities of families' lives and church involvement on the West Coast, has led us to center our Sunday morning program on worship and focus our intentional educational offerings into short term high-commitment programs like the Our Whole Lives Sexuality and Relationship Education (OWL) classes, Coming of Age, and Chalice Camp.

This year, over 75 children and youth from nursery through high school were active in our program. We continued to rotate worship between Time For All Ages services, Children's Chapel services, and Multigenerational services. Our wonderful volunteers have also helped lead Faith In Action Sundays, where we dedicated our Children's Chapel service to community service or an education experience/action for justice.

Having paid staff for the Nursery, Spirit Rooms, Club UU, and High School Group has allowed for a continuity of experience that has strengthened all of those programs. We are particularly pleased that Club UU has evolved a curriculum that alternates Neighboring Faiths/ Coming of Age with Community Service & OWL. Additional programs organized by Children's and Family Ministries in 2019 were the Church Welcome Back Potluck, Halloween Carnival, Secret Buddy Program, and Nursery Families Potluck and Toy Swap.

In the upcoming year, Club UU will continue with their community service projects such as the hygiene products drive, the food delivery, and church decoration and enrichment. Chalice Camp is piloting a new curriculum focused on Environmental Justice and Climate Change. We are also envisioning a new direction for the All Church Retreat.

Circle of Oak

Submitted by Piper Rowanoak Swim, Coordinating Priestess

(This is the Report submitted in March, with corrections marked in **bold**.)

As presently defined, our purpose is to be a resource for those who practice Earth-centering spiritual paths, to explore Earth-based spirituality together, and to offer such explorations to the church community as a whole through Pagan rituals and Pagan/UU Sunday services. This year, we named ourselves, offered rituals or Sunday services for each solar holiday, voted to seek membership as a CUUPS chapter, and chose a curriculum to offer the FUCO community.

In this coming year, we plan to **continue offering the “Jailbreaking the Goddess” curriculum we began over the summer**, become a CUUPS chapter, shift to celebrating the Lunar holidays, and travel together to participate in larger Earth-based spirituality groups on the Solar holidays. We meet on **second** Sundays for discussion, business, and logistics and on Solar holidays to offer rituals or lead worship service. Our most regular members are Tara Miller, Kathryn W., Zia Swim, Ash Kelly, Leanna Sac, and myself. 1-4 others come to each gathering from a wider pool of people.

Committee on Shared Ministry

Submitted by Kate Lenhardt. Update submitted by Noemi de Guzman.

(Update highlighted in **bold**)

Meeting Time & Place: 7:00-8:30 P.M. on the Second Wednesday of the month at church

The Charge: The Committee on Shared Ministry (CoSM) is concerned with the spiritual health of the entire ministry of the congregation, as a reflection of mission fulfillment.

Its mandate is to assess the work of the congregation and minister/s, report on its findings, and make recommendations. The CoSM does not implement or direct change; its role is to assess effectiveness and recommend potential improvements.

Fulfilling our Charge: The CoSM conducted an assessment of Children’s Worship and will send its report to the Board of Trustees in 2020. The Committee continues to receive applications from potential ministerial aspirants, and completed one interview and recommendation; the Board of Directors (BOT) voted in favor. CoSM recommended and the BOT agreed to host another aspirant’s ordination in 2020. CoSM participated in the Connections Fair, inviting participants to consider what makes for healthy shared ministry. CoSM and the BOT hosted a Listening Circle to provide an opportunity for congregants to express their greatest joys and hopes for the future at church. CoSM continues to build their spiritual and working relationship with Pastor Theresa. CoSM is planning a limited assessment of Pastor

Theresa's first year of ministry. CoSM and the BOT are planning an assessment of Pastor Theresa's second year of ministry for their Renewal of Preliminary Fellowship. CoSM is writing a new policy for sponsoring ministerial candidates.

Members: Katrinca Ford (chairperson), Carol Emert, Kate Lenhardt, Bev Smrha, Noemi de Guzman, Pastor Theresa (ex-officio member). There are currently two openings on CoSM. There will be two additional openings in June or August 2020.

Update: The board at its March 31 meeting voted to put the work of the Committee on Shared Ministry on hiatus for a few months while the charter of the Committee is reviewed and revised to align its role with the current needs and mission of the church. The board's goal was to have a new charter in place and to restart the Committee by the beginning of the new church year. In the meantime, Rev. Soto has served as the primary contact for matters relating to ministerial fellowship and to general congregational health, and they have convened and consulted a provisional Committee that includes Bev Smrha, Sarah Letson, and Noemi de Guzman.

Community Connections Team

Submitted by Leslie Brandt, Clark Sanford, and Maria Bielass

The members of the Program include Clark Sanford, Maria Bielass, Leslie Brandt, Jodie Mathies, Rev. Theresa Soto, and a cadre of greeters from the congregation.

Our purpose is to welcome newcomers & congregants and connect them into our church. Help newcomers learn about our church, get involved, connect with others, then along the path to membership. Help congregants expand and deepen their connections to our church, ministries, programs, and fellow congregants. Maintain the handouts, materials, records and systems needed for this work.

During the past year, we have:

- Greeted visitors & introduced them to our church. Over 95 people filled out Visitor Cards.
- Reached out to newcomers, connected them with church ministries, and invited to Orientation to Membership. 24 adults became members, plus 4 Coming of Age youths!
- Assisted ministers with the Spring & Fall New Member InGathering Services. Organized a welcome reception following the Fall service.
- Held our annual Connections Fair in September. We had great participation -- the room was packed with congregants, and over 40 church groups were represented.
- Managed Sunday Greeting & Welcome Tables. Worked the tables when we could, and helped staff with setup & cleanup. Restocked the tables, display racks & pews.
- Did weekly office work in support of our programs. Maintained visitor & member records and email lists. Printed brochures, handouts and name tags. Revised these materials as needed, and worked with other church groups to update theirs.

- Streamlined & documented CCT procedures. Updated Greeter guidelines. Simplified attendance recordkeeping. Wrote instructions for printing brochures & other materials.
- Coordinated our work with church staff, Stewardship, Ushers, and other church groups. Worked to synchronize information between systems, and handle updates better. Now have New Member & Information Change cards in place, and working on procedures for using them. Helped reconcile member versus pledge records for Annual Meeting.

In the coming year, we will:

- Continue our current greeting, welcoming, and connecting work.
 - Recruit more people to help at the Greeting & Welcome Tables.
 - Create and deliver a “Hospitality” class for Greeters and Ushers.
- Expand & improve our outreach to newcomers & new members
 - More follow-up with newcomers, and hold regular Orientation classes.
 - Organize New Member gatherings to socialize with more congregants.
- Help ministers with the Spring & Fall New Member InGathering services
- Organize our annual Connections Fair. Perhaps move to two a year?
- Continue streamlining & documenting CCT procedures.
- Work with other church groups to better maintain congregational information -- member, pledge & finance data with Stewardship & bookkeeping, contact info on mailing lists, etc.
- Support the church in hiring a Membership Coordinator.
- Help church staff & lay leaders to choose a replacement for Fellowship One.
- Recruit more people to help with this important ministry!

Here’s where you can find us:

- Sunday Greeting Table: before service in church foyer, 9:45 to 10:30 am.
- Sunday Welcome Table: after service in Wendte Hall, 11:45 am to 12:30 pm.
- Orientation to Membership: 4th Sunday after service in Starr King, 12 noon to 2 pm.
- Connections Fair: typically late January, after service in Wendte Hall, 12 noon to 2 pm.
- Office work & periodic meeting with minister: typically Wednesdays, 11 am to 1 pm.

Covenant and Affinity Groups

Submitted by Emily Stoper, Covenant Group Coordinator

Almost 50 members and friends of our congregation attend one of five covenant groups, which is one fewer than last year. During the pandemic, all 5 groups are meeting on Zoom. Covenant group members deepen relationships with each other and discuss the monthly themes as well as other personal, social and spiritual topics. One group meets on the 2nd and 4th Monday mornings of every month. The other groups meet one evening a month: on 3rd Wednesdays, 1st Thursdays, 3rd Thursdays and 2nd Fridays. The covenant groups are open to anyone who wishes to join. For more information about any covenant group, contact Emily.Stoper@gmail.com. There is also a very active Pagan Interest affinity group (Circle of Oak) led by Piper Rowanoak, as well as a Young Adults affinity group (Contact: Brian Joaquin).

Earth Justice Associates

Submitted by Jack Macy

Members/Participants include Bret Andrews, Frances Aubrey, Scott Bailey, Tracy Day, Tamara and Tom Haw, David King, Jack Macy, Corless Smith, Tom Smith, Brinda Thomas.

The Earth Justice Associates (EJA) program offers congregants opportunities to take action to help protect and restore the earth and for justice, such as responding to the climate crisis. We see earth or environmental justice deeply intersecting with racial and social justice with much environmental degradation, including climate disruption, impacting more severely communities of color and lower income. We seek to help transform our connection to and impact on the web of life through individual personal actions, greening church facilities and engaging with and supporting justice work beyond our walls.

EJA's primary activity this last year has been researching cost and feasibility of getting solar electric panels on the church roof that would dramatically reduce our carbon footprint, save church in energy costs and be an act of environmental justice. EJA engaged with and got proposals from multiple companies for installing solar panels and proposals for replacing at least Wendte Hall's south roof where solar panels would go. EJA shared with the Board of Trustees our findings and the benefits of putting solar on the church. EJA met with Pastor Soto and the Operations Team and got input on moving forward to engage the congregation on a plan to finance and install solar.

In addition, EJA put on an Earth Day justice service in April that featured guest youth climate activists and held up the need and hope for taking action for the climate such as supporting a green new deal. That service was followed by an alternative energy faire and coffee hour tabling offered many ideas and resources for action. EJA also continued to help facilitate the composting and recycling collection at the church.

This spring, EJA will be sharing with the congregation options on how the church can finance, install and benefit from solar and will seek congregants input and engage in a broader dialogue on how we can respond to the growing climate crisis. EJA will also plan a Earth Day justice service and continue to look for ways to support actions for earth justice.

We meet on the 3rd Sunday of the month at 12 noon in the 3rd floor open area (except when rescheduled due to conflicts). We always welcome new folks to join us or are eager for new ideas and energy for creating earth justice.

Endowment Team

Submitted by Tom Haw and Laila Ibrahim

Our three congregational endowments will ensure and strengthen the vision, mission and presence of First Unitarian Church of Oakland for the future. In addition to our congregational accounts the UUA holds two trust accounts for us that we have no oversight or control over.

We held a successful fundraiser for the Justice Endowment to honor the ministry of Pastor Jacqueline Duhart as she transitioned to be our Minister Emeritus. We dream of ultimately raising that endowment to 2 million dollars.

As of December 31, 2019:

The Wendte Endowment for Building Maintenance and Improvement

Grew from \$470,110 to \$1,492,169. (Thank you to Howard and Joan Poulter.)

The congregation began taking distributions in 2019 and received \$14,257.

The congregation spent more than \$100,000 on building maintenance and repairs thereby fulfilling the requirements of the endowment.

The Aurelia Henry Reinhardt Endowment for Justice

Grew from \$11,592 to \$114,296.

The congregation is not getting distributions until we get this account to \$500,000.

First Unitarian Oakland Memorial Endowment Fund

Grew from \$113,031 to \$198,627 and distributed \$8,221 to the congregation for operating expenses.

We are continuing a campaign to educate the congregation about the endowment to ensure this building will still be a thriving liberal religious congregation 150 years from now! Contact Laila or Tom to learn how to contribute to our funds now or in your estate planning.

Finance Team

Submitted by Jodie Mathies with updates (in bold) from Treasurer, Hester Green

Your dedicated Finance Team in 2019 has been Hester Green (Co-Treasurer), Jodie Mathies, Jane Voytek, Bill Blakely, Leslie Brandt, and Laila Ibrahim (rep for Endowments). Bill has rolled off in 2020; we are looking for an additional team member!

We also want to thank Meri Lane for her assistance and her research, questions and observations regarding the finances while serving as Acting Co-Treasurer. Unfortunately Meri has decided not to continue as Co-Treasurer so as part of the search for new Board members we hope to find a Finance-minded person who can work with us to get up to speed to take over from Hester as Treasurer in March, 2021 when her Term as a member of the Board of Trustees (and Treasurer) expires.

The Finance Team's mission is to help the Board Treasurer to provide accurate financial information to the Board and the congregation, assist Stewardship and Membership teams, prepare the annual Budget, as well as collaborate with our Bookkeeper and Congregational Administrator in their financial duties.

We meet monthly on the second Saturday morning from 9:15 to about 11:00AM and as needed. Meetings since 6/2019 have been more often as we have chosen to take on some bigger projects for our financial health and transparency.

Key activities over the year 2019 and the past 9 months of 2020:

- **Successfully prevented financial disruption caused by Covid by obtaining a PPP Loan, much of which we expect to be forgiven and has so far made it possible to maintain our staff during a time when needed even more**
- Assist new professional Bookkeeper to close books for 2018 (accomplished 6/2019)
- Review monthly Income statement and Balance sheet reports and provide input
- Work with Accounting consultant to revise Chart of Accounts (Income Statement complete; Balance Sheet to come) and improve our accounting best practices
- Prepare Budget(s) throughout Stewardship season; work with Board and Operations Team to establish priorities. **In addition, we developed a mid-year 2020 budget update for Board review and approval, anticipating the financial deficits expected for the rest of the year and into 2021 due to closure of our facility.**

Plans for 2020:

- Complete Chart of Accounts upgrade; work with Bookkeeper to implement (DONE); review data monthly (IN PROGRESS)
- Create standard reports from new CoA for Board and Congregation
- Create Finance Team Calendar with activities
- Work with 2020 Stewardship Chair(s) starting when appointed by the Board
- Continuous improvement on our accounting practices especially with the high-volume year-end work such as tax notices of donations.

We provided financial information regarding the updated budget and the Assets but are planning to hold a "Town Hall" style discussion meeting this coming Fall for all of those who have questions and would like to go into more depth regarding UU Oakland's finances. We will follow with more details on the day and time for this as soon as possible.

Handbell Choir

Submitted by Vincent Raines

We have just resurrected the handbell choir after a 10-year hiatus. Our mission is (1) To bring a new musical dimension to worship, (2) Create fellowship among ourselves, and (3) Develop our abilities as musicians. Anyone with the ability to ring two handbells and a good sense of rhythm is welcome; we teach music-reading as required.

Our first rehearsal was held on February 20. We meet every Thursday at 7:30 pm in the Program Room (second floor). We are looking for up to 10 members in addition to the director to prepare for our debut at the morning service on Sunday, April 26. We also plan to perform at Music Sunday, June 6. Current members are Beverly Hanson and Vincent Raines.

Journey Toward Wholeness Transformation Team

Respectfully submitted by The Journey Toward Wholeness Transformation Team (JTWTT): Donna Fujioka, Noemi de Guzman, Janet McFarland, Kathy Radez, Wes Radez, and Dennis Rowcliffe. Dan Wright is the Board liaison to the Team.

(Updates to the March 2020 Report are marked in **bold**.)

The Team's mission is to further the Church's transformation toward its goal of being a multi-cultural, anti-racist institution.

The Journey Toward Wholeness Transformation Team (JTWTT) remained very involved in the life of the Church during 2019:

- Following submission of the Assessment Team's Report on the Church's progress toward becoming a fully anti-racist, anti-oppressive, multicultural institution, we co-led a worship service, showcasing the report; and asked Church groups to conduct self-assessments, offering our help.
- We advised the Board of Trustees of our highest priorities for anti-racist action during 2019.
- Two of our members participated in the Ministerial Search Committee.
- We participate in the Multicultural Action Committee (MAC) formed by Pastor Soto.
- We added two members and lost one; Wes and Kathy Radez joined, and Heather Macleod rotated off to join the Adult Faith Development Committee.
- We continue to plan and facilitate the First Sunday gatherings, now in collaboration with Pastor Soto, who joins the service theme with the First Sunday agenda. Attendance is at an all-time high.
- We conducted an analysis of micro-aggressions at the Church.
- We are working to expand our circle of connections, by sponsoring some Congregants at anti-racist-themed conventions and trainings.
- We continued to provide a process monitor for nearly all Board meetings, as we have for several years. In 2019 we recruited and scheduled a small group of process monitors to share this duty.
- **Membership in the Journey Toward Wholeness Transformation Team (JTWTT) has changed. Kathy Radez stepped off the team upon joining the board of trustees. Wes Radez is currently on leave .**
- **First Sunday Gatherings for Anti-Racism and Anti-Oppression have continued without interruption on the Zoom platform since the church shifted to virtual operations. The gatherings have been supported and enriched by facilitation and**

participation of guests, both in the Black, Indigenous, and People of Color caucus and in the dominant culture caucus.

- **JTWTT is in the process of creating new processes for optimized partnership with the justice team. The recent forum on police accountability was sponsored by the justice team, Rev. Theresa Soto, and JTWTT.**

This year we will continue to plan and facilitate First Sundays; sponsor Congregants at anti-racist events and trainings; work with Rev. Soto to discern the most effective and joyful path forward for our anti-racism work; and support Church groups incorporating anti-racist practice into their processes.

Justice Team

Submitted by Micky Duxbury

The Justice Team, formerly the Justice Council, underwent a period of decreased activity in spring of 2019. We resumed meeting in August 2019 and have an active membership of between 6-10 people attending monthly including the following: Emily Stoper, Helen Duffy, Bev Smrha, Lauren Poole, Corless Smith, Megen Wachpress, Bill Chorneau, Claudine Tong, and Micky Duxbury.

At the board meeting last spring, we made the following suggestions of ways to become a more justice centered church:

- Engage more of the congregation through providing clear pathways for different ways of being involved and increasing visibility of the different ways to be involved
- Reduce the silos! Bring into closer coordination and collaboration the current four main justice ministries: BOOST, Ella Baker, Immigration and Earth Justice
- Increase collaboration with faith and justice work in Oakland
- Integrate dismantling white supremacy culture into our justice work – racial justice and social justice go hand in hand
- Nourish the congregation's justice engagement through spiritual grounding and deepening

We asked for the following:

- Ongoing communication between the Justice Team and Board;
- A written report by Justice Team in monthly packet;
- Justice rep. has 5 min. slot every month to share progress
- Liaison from Board present at major Justice Council sponsored events at the church
- Strong, consistent message from Board to all new & old members: consider engagement in Justice;

We are focusing on the following:

- Donation plates for local organization fighting structural/systemic racism/poverty.
- Provide leadership with minister and Justice Council for church-wide justice engagement meeting (beginning conversation)

- Once JTW assessment is completed, support implementation
- Cultivate leadership of people outside the dominant culture. Invest resources to develop leaders. Considering the possibility of a stipend to fund a high school student to be our church's Justice Youth Intern for a year, beginning with their attending a justice training provided by the UU Justice Ministry of California.

We have not yet coordinated with the board adequately to fulfill these suggestions. We have started the monthly justice moment. We have met with Reverend Soto on several occasions to inform them about the current work of the justice team.

Moving forward:

- Our focus is to organize the monthly justice moments:
 - February – Lauren Poole on the accompaniment team
 - March – Claudine Tong on youth and public transit
 - April – Megan Wachpress on immigration, a Passover theme
 - May – Helen Duffy on housing
- Create themed services with speakers after service. Our next theme service is March 23 with Zachary Norris from the Ella Baker Center speaking about his new book and the criminal justice system.
 - Possible service in September based on a congregational youth trip to the border during the summer, led by Amy Carlson
 - Annual UUSC service, probably in January
- Sharing the Plate: The current proposal is to give 1/4 of the plate for a month for each designated organization thereby engaging more congregants over time and increasing exposure to the organization. The organizations previously agreed upon are: Interfaith Movement 4 Human Integrity, Ella Baker Center, Project What?, and Community Ready Corps. If we adopt the month long giving, we will have one Sunday that a speaker from that organization speaks briefly in the service and afterwards. We hope to not just give money, but help congregants become aware of how the designated organization serves the Oakland Community. Organizations that we are considering as well are: Genesis, EBase, Insight Garden Project, Immigrant Family Defense Fund, and California 4 Human Empowerment.

A discussion of criteria for supporting organizations has begun with Journey Towards Wholeness. We will continue with the Program Council, and with the Board, and Pastor Soto. Steering organizational structure: We don't have an official steering committee. Micky Duxbury and Helen Duffy share leadership, chair meetings, and decide agendas.

To summarize, we are focusing our energies on raising interest in justice work within the church and on raising money for local justice groups. We need to revisit the dialog with the Board and start the processes that were agreed upon.

Men's Fellowship

Submitted by Ron Weisberg

Upwards of 30 men who are members or friends of the congregation

The Fellowship offers spiritual support to the men of the church; oversees activities which bring men into fellowship; and sponsors events for all in which to join.

- The Fellowship has organized a walk around Lake Merritt; a breakfast and conversation; and recently sponsored a clean up Saturday for all.
- The Fellowship plans to hold a quarterly clean up day for all members of the church to participate in maintaining our building; we are planning an all church hike for March; and hope to return to our annual weekend retreat.
- The Fellowship holds a monthly "chat:" for all men to share personal issues and discuss ideas for the Fellowship; this is at 9:30 AM on the 2nd Sunday in the 3rd floor library.

Ministerial Search Committee

Submitted by Noemi DeGuzman

Members: Noemi DeGuzman (chair), Donna Fujioka, Lynn Gallogly, Dan Goss, Brian Joaquin, Linda Probert Sanford and Sherry Weston-Vigil

With the blessing of the church community, as charged by the board of trustees, and in keeping with our covenant with one another, the members of the ministerial search committee engaged in conscious appreciative collaboration to search out a lead minister candidate whose characteristics and expertise match the present and future needs of the congregation.

Key activities over the past year (March 2019 through March 2020):

- Hosted pre-candidating weekends and completed minister reference checks.
- Identified a recommendation for UUA to address process flaws which, for example, did not suit the goal of true inclusion and opportunity for every type of candidate.
- Submitted ranked list of candidates to UUA Transitions Office.
- Requested that board sponsor forums to hear interests and concerns of congregants with respect to ministerial search; attended the forums.
- With thanks for the participation of many, many congregants—adults and children—and staff members who assisted with the search process and candidating week, made an offer, received acceptance, and recommended candidate to the congregation for a vote to call.
- Completed minister criminal background and sex offender checks.
- Planned and created schedule of candidating week events; facilitated events.

- Secured 96% affirmative votes to call Rev. Theresa I. Soto as the lead minister of First Unitarian Church of Oakland.
- Finalized and executed letter of agreement.
- Expended 94% of budget allocation and returned remaining funds.
- Handed off ministerial transition responsibilities to board.
- Was released from charge and celebrated by the congregation in a gratitude ritual.

Plans for the coming year – Chillax for a time and as opportunities arise, contribute sharpened insights into successful ministry, to the health of First Unitarian’s shared ministry.

Music Ministries

Submitted by Renée Witon and Stefan Schneider

Crescendo Choir continues strong, with consistent membership of 28 singers. We are continuing to create a diverse repertoire from classical to gospel to jazz to world music to Americana. Enthusiasm for singing in the choir and ministering to congregation continues in this ministry.

Joyful Noise is now in its 10th year of performing in worship. This year at the request of Rev. Soto, JNB is playing 42 Sundays and continues to bring the celebration of worship to the beginning of each week’s service.

The Pop-Up Choir is in its second year and is growing in interest and participation. Fifteen to twenty people participate in each Pop-Up Choir monthly service. Susan Keiter is doing a wonderful job finding music, teaching music and performing music, all on the same day!

The newly formed Handbell Choir, directed by Vincent Raines, is in its infancy at First Unitarian. The hope is that it grows to be a viable part of the worship music program.

Pastoral Associates

Submitted by John Shinnick

The Pastoral Associates program was started in 1991, a vision spearheaded by the late Mary Ann Haw as a means of providing congregants in need with comfort, support and practical assistance by fellow church members. Since that time, dozens of congregants have stepped forward in hundreds of situations to smooth one another’s journeys in times of stress.

Over this past year, services provided by the associates (at times with the able assistance of the Lend-a-Hand volunteers) have included visits to shut-ins, transportation to medical appointments, miscellaneous housekeeping services to disabled congregants, and assistance at memorials, and other services as needed. We are not at present keeping records regarding specific cases.

The Pastoral Associates generally meet the second Thursday of each month at 7:00 in the 3rd floor library. After rotating the lead role, we have moved to six-month rotations for 2020, I'm taking the first six months, and Evelyn Sheridan will lead the second six.

In addition to our traditional work, for 2020, we will be focusing efforts in two areas:

- In accordance with the JTW assessment report, we are pursuing the identification of who we are not serving and how to change the situation.
- We are assessing our own training needs and addressing them.

Current Pastoral Associates are Judith Hunt, John Kelly, Scott Magness, Daphne Parson, Evelyn Sheridan, John Shinnick, Annette Williams and Carol Wood. Over the past year, Corless Smith, Ben Thompson and Dick Bailey have moved on, and their service will be missed.

Personnel Committee

Submitted by Danny Schottenfeld and Roxie Kellam

The committee is made up of 3 - 5 members of the church membership who serve for two years and a board liaison to develop personnel policy. Since there have been no requests by the board for new personnel policy, nor a minimum of three committee members, nor a board designated liaison, the committee has not met since June of last year. The Personnel Committee wrote a Personnel Handbook for FUCO, that was approved by the Board in February, 2019. This was a major undertaking that took over four years to complete. The handbook covers, among other items, Hiring guidelines, Leaves, Evaluations and a Covenant.

Slide Creators

Submitted by Emily Stoper

The slides you see every Sunday morning used to be made by one person, Michelle Ma. When she left three years ago for her ministerial internship, it took a team to replace her, taking turns at this partly artistic, partly technical job, which we hope enhances your experience of worship. We aim for beauty, clarity and meaning. Over the course of this year, Dan Wright, Kem Tetlow, Margo Fleming, and Laila Ibrahim rolled off the team. As of March, the members were Vincent Raines, Anita Thomson Kelly, Susan Martinez, Emily Stoper, and Dick Bailey. During the pandemic, the slides creators team is not functioning. Visuals for the online Sunday services are being created by Vincent Raines.

Stewardship

Submitted by Hester Green, Co-Chair

Additions to the March report are highlighted in **bold**.

First of all, thanks to the following who served on this team: Rev. Soto, Co-Chair; Bill Blakely,

Janet McFarland, Jodie Mathies, and Michael Rothhammer

Our mission has been to engage all of us members to share our financial resources and our personal talents to make our collective “audacious” dreams and goals a reality.

Key Activities in the past year:

Throughout October we enjoyed numerous house parties where we could talk about what UU Oakland has meant to us in all aspects of our lives. Thanks also to the many wonderful folk that opened up their homes and hearts to all of us by hosting house parties throughout October:

Carol Emert	Mark and Lucia Savage
Rinda Bartley & Laila Ibrahim	Tom and Tamara Haw
Wes Radez and Kathy Vermazen Radez	

October 20, “Kick-off, Sunday”, J Mase III, a Black/trans/queer poet & educator based in Seattle by way of Philly, delivered an inspiring Sunday service led a workshop to us explore “Active Faith”. On November 17th, “Celebration Sunday”, we were inspired by guest minister, Rev. Ranwa Hammamy, Executive Director of the UU Justice Ministry of California and President of DRUUMM (Diverse Revolutionary UU Multicultural Ministries).

This year’s generous donations will help greatly to support the following:

- A 3% cost of living increase for our full-time and hourly staff
- TLC, high-quality maintenance along with improvements to our historical building
- Continuing to support and grow our Family Ministries
- Fair share giving to the UUA and regional organizations
- Provide a competitive compensation package to our new minister
- Continue and deepen our relationship with our community partners such as Boost! West Oakland, McClymonds Merit Scholarship Program and Ella Baker Center – the list keeps on growing.

Stewardship 2020 Data Highlights:

Our total as of February 21, 2020 was \$416,404 or about 94% of our Stewardship 2020 budget goal of \$466,000. This does not count the pledges from those who may make their commitment later or from new members joining and pledging this year. To date, we have received 172 pledges of a projected total of 182, a decrease of 12 pledgers.

An analysis of Stewardship 2020 compared with the past 2 years showed the following:

Stewardship Year	2018	2019	2020
# Pledging Units	185	182	172
Average (Mean) pledge	\$2,311	\$2,626	\$2,306
Median pledge	\$1,200	\$1,320	\$1,250

The median pledge for the above 3-year period has been about half of the (mean) average pledge which could be a warning sign that we may be relying too much on the high donors and that Stewardship efforts for future years should focus on reaching out to smaller givers to increase their pledges.

MID-YEAR REACH OUT TO CONGREGANTS REGARDING PLEDGES

In June we did a mass mailing to reach out to the congregation regarding how economic hardship were affecting their ability to continue with their 2020 pledge payments as well as to provide a candid picture of how UU Oakland finances were adversely affected by Covid. We received an overwhelming response of sympathy along with some people increasing their pledges to help out as well as some of those who indicated economic hardships and the need to reduce their pledge amount. We thank everyone who responded and want to let everyone know how helpful their response has been in near future financial planning during these challenging times.

Plans for the coming year:

The Stewardship Team is looking forward to getting a much earlier start in developing a robust Stewardship Team and expanding Stewardship to be a year-round activity that is not limited to the traditional annual drive. We also plan to reach out to staff and leaders of various groups and departments to look ahead to future needs and aspirations both in the next year and even longer. **This summer several of us along with our Board president, Rinda Bartley, reached out to other UU congregations who have recently implemented year-round stewardship. We have learned a great deal from meeting with them about the rewards and learning experiences they faced during the process of transitioning to the year-round model and believe that we are prepared to begin developing year-round Stewardship on a trial basis.**

Please contact us if you have immediate questions or you wish to join us at stewardship@uuoakland.org.

Tech Team

Submitted by Clark Sanford

Members of the Program: Clark Sanford, Jane Voytek, Michael Fitzhugh, Laurel Egenberger

Our mission is to assist church staff in maintaining our technical assets -- computers, network, web site, and various online applications, that are used by church staff & congregants. We are a few resources that help in the areas we are familiar with, mostly to help fix problems.

Key activities over the past year:

1. Maintained church website, loading images & reports, updating links, revising pages, troubleshooting problems. Moved our site to another, more reliable, hosting company.
2. Recently started a project to build web pages for all our church groups. In the first phase of collecting content for those pages from the groups.
3. Administered Fellowship One, our congregational database, troubleshooting problems, cleaning up data, developing reports, etc. Helped with reconciliation to stewardship records and our year-end reporting.

4. Administered church email groups. Continued extensive cleanup started in 2018.
5. Helped maintain & troubleshoot Signup Genius, which we use for online event signups.
6. Investigated problems with our church network, wireless & internet. Researched alternatives to our current internet provider & reported to church staff.
7. Helped with various PC, printer, projector & other equipment problems.
8. Consulted with staff & congregants on other online applications used by the church.

Plans for the coming year:

There is no formal technical team to coordinate, manage, research or develop our use of technologies to better serve our church. I believe we would benefit greatly with a more conscious, planned approach.

1. Work with the Board, Ops Team, and staff to establish a Tech Team for that purpose.

And some specific projects on the horizon:

2. Help staff implement a new internet service provider, and improve wireless coverage.
3. Continue project to build group web pages. Then tackle overhaul of web site navigation.
4. Reconcile congregational information between our various databases & applications, and validate with congregants. Develop means to keep this information up-to-date.
5. Investigate alternatives to Fellowship One, and assess our needs in this area, to make sure our choice can actually deliver!
6. Find more effective tools & methods for producing church email communications. Explore other ways to communicate.
7. Continue administration & support of our various technical assets.

Unitarian Universalist Service Committee

Submitted by Emily Stoper

Two church members, Jane Facente and Emily Stoper, are members of the Stewardship Circle of the Unitarian Universalist Service Committee (UUSC). In May, both Emily and Jane attended the annual meeting of the Stewardship Circle in Reno. In January, they led a Sunday morning service about the work of the UUSC, which kicked off a very successful month-long Guest at Your Table annual fund-raising drive in the congregation.

Women's Retreat

Submitted by Emily Stoper

The 2019 Women's Retreat, with the theme "Embracing our Wild and Precious Lives," was held in July at Redwood Glen Camp and Conference Center in Loma Mar, CA, with 46 women and 5 children in attendance. They enjoyed swimming, hikes in the redwoods, delicious meals, deep conversations, a campfire, a women's ritual, and workshops in crafts, singing, improv theater, sharing our stories about race, nonviolent communication, and songwriting. The members of the planning team were Karen Axelsson, Marcia Kreycik, Maya Ibrahim-Bartley and Emily Stoper. The 2020 in-person retreat was cancelled because of the pandemic. Instead, a one-day Zoom

retreat was held on June 27, with almost 50 women in attendance. The organizers were Karen Axelsson, Marcia Kreycik, Marilyn McMahon and Emily Stoper. The 2021 Women's Retreat organizing team will be Karen Axelsson, Marilyn McMahon, Sondra Schwartz, Emily Stoper and Carol Wood. The retreat will be held at Redwood Glen if possible and on Zoom if necessary.

Young Adult Group

Submitted by Brian Joaquin

Co-Leaders: Sarah Letson, Brian Joaquin, Lisa Randall, & Melody Salerno

We thank Sarah Letson for all the work and efforts she gave to our ministry as she departed from the Leadership Team in February 2020. We welcome both Melody Salerno and Lisa Randall as they both entered into the Leadership Team beginning late 2019.

The Young Adults Group is a hub for anyone between the ages of 18-35+ who are interested in Unitarian Universalism, building community, and/or just want to have fun. Our goal is to support the already strong young adult presence & community inside and outside of church.

We led social dinner potlucks of 4-8 participants once a quarter at the Starr King Room, which were filled with numerous moments of connection, playing "Salad Bowl", and consuming delectable food together in community!

A few more highlights in the past church year include:

- National Coming Out Day: The Young Adults Group hosted a National Coming Out Day (NCOD) Potluck Sharing Circle. On Friday, 10/11/2019, Brian Joaquin facilitated an all-church event inviting participants to share their intimate stories describing a time in their lives they came out as Lesbian, Gay, Bisexual, Transgender, Intersex, Queer as well as inviting our straight "Allies" to share a time they became an Ally when a Queer individual came out to them. The last time the church orchestrated such a sharing circle for NCOD was back in 2013!
- UC Davis UU Youth Engagement: On Sunday Worship Service, 1/19/2020, FUCO was visited by our beloved Alex Haider-Winnet along with his students from the UC Davis UU Campus Community for a field trip in seeing how worship service was like at our church. After the service, eleven (11) FUCO Young adults sat with Alex's eight (8) UC Davis students as they discussed what the importance of community meant for them at our church compared to our guests in their UU Campus Community, especially when "Davis is a 'small' blue dot in a big 'RED' county".
- Oakland/SF Young Adult Community-Building: YAG started building a relationship with the UU San Francisco Young Adults Group, "20 & 30's Community", as they work on bringing more people from the Bay Area together in events to create more visibility for UU Young Adult

Fellowship. For our last winter quarter social potluck, we were joined by 6 YA's from UU San Francisco -- totaling up to 15 participants dining over community and fun!

Financial Documents

2020 Budget Summary

Revenue

Stewardship	\$ 417,000
Rental Income	\$ 70,000
Collection Plate (gross)	\$ 24,000
Income from Trusts/Endowments	\$ 100,226
Program / Event Income	\$ 24,494
Miscellaneous Income	\$ 15,000

Total Revenue **\$ 650,720**

Expense

Wages (Ministers/Staff)	\$ 328,749
Benefits	\$ 93,386
Professional Services (all 1099)	\$ 34,468
Program / Event Expenses	\$ 48,676
Denominational support	\$ 28,000
Special Collections	\$ 12,000
Facilities (Maintenance and capital expense)	\$ 93,383
Administrative	\$ 47,151
Other	\$ 10,100

Total Expense **\$ 695,913**

Expenses exceed income during 2020 (45,193)

Cash from 2019 available for 2020 expenses \$ 45,193

12/31/2019 Asset Statement

Assets:

Total Bank Accounts:	\$ 439,405.58
Total Fixed Assets:	3,379,047.37

Boston - 1st Unitarian Mem.#420:	198,627.94
UUCEF Wendte Building Endowment:	1,492,169.70
UUCEF Aurelia Reinhardt Justice Endowment:	114,296.99
Other Endowment Funds not controlled by FUCO:	52,474.29
Manse Fund loan to Rev Soto:	8,757.74
Prepaid Insurance and Bookstore Inventory:	9,459.06
Total Assets:	\$ 5,694,238.67
Long-term liabilities:	\$ 0.00

Net Asset Detail (amounts reserved for special programs:*

Musicopia:	\$ 7,330.95
Manse Fund	37,557.67
Fund for Social Justice	6,778.64
Intern Fund:	23,146.00
Green Sanctuary Fund:	3,627.00
Total	\$ 78,440.26

*these are in addition to the Endowment Funds

7/31/2020 Asset Statement

Assets:

Total Bank Accounts:	\$ 374,668.54
Total Fixed Assets:	3,379,047.37
Boston - 1st Unitarian Mem.#420:	194,964.38
UUCEF Wendte Building Endowment:	1,572,197.19
UUCEF Aurelia Reinhardt Justice Endowment:	127,907.60
Other Endowment Funds not controlled by FUCO:	50,903.62
Manse Fund loan to Rev Soto:	8,757.74
Prepaid Insurance and Bookstore Inventory:	\$ 11,649.55
Total Assets:	\$ 5,720,095.96

Long-term liabilities:

PPP Loan*	\$ 71,184.00
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Net Asset Detail (amounts reserved for special programs:**

Musicopia:	\$ 7,330.95
Manse Fund	37,557.67
Fund for Social Justice	6,778.64

Intern Fund:	23,146.00
Green Sanctuary Fund:	3,627.00
Total	\$ 78,440.26

* At least \$60,000 is expected to be forgiven with the liability decrease

**these are in addition to the Endowment Funds