

First Unitarian Church of Portland
Board of Trustees Meeting – November 4, 2021 – Agenda
Board (only) Deepening 6:30, Board Meeting - 7 - 9pm - Zoom call – link

Join Zoom Meeting

<https://us02web.zoom.us/j/82930223125?pwd=TDdrckx1T0lSTG1KT3BFWGx5MmQyZz09>

Meeting ID: 829 3022 3125

Passcode: 398649

One tap mobile: +12532158782,,82930223125# US (Tacoma)

Board Meeting

6:30 Deepening/Check-in

7:00

Convene

Opening Words – Cindy
Determine Quorum
Process Observer Review
Review Agenda
Review and Approve Previous Meeting Minutes

Board Roles

Timekeeper – Marilyn
Process Observer –

7:05

Congregant Comment Period

7:15

Updates

Committee updates – reports attached

Dates to Calendar

Board Forum on new Church goals – November 14

ET Update

7:35

Consent Agenda

- Approve Assessment of Ministry

7:40

Short Discussion Items

- Replacing Brad Taylor
- Postponing conversation on Board size to next year

7:50

Generative Discussion

- Revising Board goals to align with Church goals

8:45

Meeting Wrap-up

Closing comments, items for future agendas
Communications Check
Process Observations
Closing Words – Cindy

9:00 Adjourn

Our Mission:

The mission of First Unitarian Portland is to create a welcoming community of diverse individuals; to promote love, reason and freedom in religion; to foster lifelong spiritual growth; and to act for social justice.

Our Vision:

First Unitarian Portland is a beacon of hope for us and for our community, a spiritual center in the heart of our city that helps each of us to find our moral compass, calling and challenging us to build the beloved community with an ever deepening sense of spirit, diversity and inclusion.

First Unitarian Church Goals

3- or 5-Year Church Goals are created in collaboration with the congregation and Executive Team and adopted by the Board. They reflect the mission and vision of our church. Church goals are primarily carried out by the Executive Team and staff, collaborating with the Board. Board 1-3 Year Goals are created by the Board and Executive Team at its yearly Retreat. Board goals may draw from the 3-5 Year Church goals yet reflect work within the purview of the Board.

Provisional First Unitarian Church Three Year Goals

Provisional Church goals for 2021-2024 were approved on 10/7/2021 and will be verified by the congregation in a Board Forum on 11/14/2021.

As we work to embrace our call as a justice-seeking community in the emerging post-pandemic era, we recognize the unique value First Unitarian Church and liberal religion bring to Portland and the larger community. We will:

- Successfully complete the ministerial transition and establish covenantal relationships among the new minister, the congregation, staff, and Board.
- Take the next steps toward living into the 8th Principle by examining all parts of the church structure to ensure we are accountably creating a multicultural and anti-racist environment where each person is welcomed and finds connection.
- Create a long-term plan for development and sustainability of the church campus given congregational needs and resources, community needs, and the evolving dynamics of downtown Portland.
- Enhance and promote an ever-growing culture of generosity and financial sustainability.

Board 1-3-Year goals (need be updated when new Church goals are approved)

1. Continue to examine the ways in which power, privilege and White supremacy culture affect our church, including our board work, to include:

- a) Educating ourselves on the issues, such that we can support the development of this work in the congregation.
 - b) Taking steps to improve our practices and model antiracist behavior. This will include:
 - i. Evaluating how we enact policy-based governance in a manner that actively dismantles White supremacy culture in our board and in our congregation.
 - ii. Exploring and considering endorsing the adoption of the 8th Principle through its addition to our bylaws.
2. Holding the mission of the church, engage in ongoing, generative conversations with the Executive Team and the congregation to:
 - a) Develop understanding of the church that's emerging, as well as the pastoral needs and continuing connections among congregants in the church that is
 - b) Approve a revenue plan to sustain the mission of the church in current and emerging contexts
 - c) Lead the congregation in development of 5-year church goals
 - d) Consider viable options for maintenance of our current physical plant and future development of the campus to meet the needs of the emerging church
 3. Governance committee will review and possibly recommend changes to the bylaws as they relate to size of Board, and definition of pledging member in board policies.
 4. Continue to support the Ministerial Search Committee and the transition to a new Senior Minister.

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 - c) Educating ourselves on the issues, such that we can support the development of this work in the congregation.

- d) Taking steps to improve our practices and model antiracist behavior. This will include:
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- 7. Governance committee will review and possibly recommend changes to the bylaws as they relate to size of Board, and definition of pledging member in board policies.
- 8. Continue to support the Ministerial Search Committee and the transition to a new Senior Minister.

GOVERNANCE COMMITTEE

Chair: Ryan Deibert

Committee Members: Mindy Clark, Cindy Cumfer, Caitlin Hill, Adam House

DATE AND PLACE: Wednesday, October 13, 2021, 7-9 p.m.

Zoom Link:

<https://us02web.zoom.us/j/85811770053?pwd=Slkxdzk1bVdOdTh1MXFiSGNPNYi9Vdz09>

Light Virtual Chalice

Opening Words—Adam

Announcements

Acceptance of [Last Meetings Minutes](#)

Report on To Do list on Last Meetings Minutes:

- Mindy final formatting of 2021 Bylaws revisions and coordination with Kathryn on posting location – **deferred**
- Ryan to invite ET into discussion regarding three-year ET review – **deferred**
- Cindy to review safe church policy and make recommendations - **deferred**

Additions/Changes to Agenda?

Notes to the whole group – if no objections notes will be forwarded to John for the Board Packet.

Adoption of previous

1. Review Assessment of Ministry development process and discuss committee collaborative processes

- **Timing of the assessment made it difficult for the process to be more collaborative this year.**
 - **We will be able to have the first draft out earlier this time.**
 - **We will want to do it earlier because of new members joining next year.**
 - **The task of drafting the assessment would have been difficult to complete as a full committee.**
- **This year we can totally reimagine how we collect information / survey.**

2. **Complete 2020-2021 Assessment of the Ministry.** At our October board meeting, we held generative discussion regarding the draft assessment of the ministry. Discussion included some additional themes that we should address to complete the draft. Let's work through those together. It may be helpful to reference the draft [October board meeting minutes](#) and to reference the [current draft assessment](#).

- **Adding information about the demographics of respondents.**
- **We are committed to the work of anti-racism and recognize that we are lacking some tools to do so (32% said we don't do a good job with difficult conversations and staying in relationship)**
 - o **"While our commitment is strong, we may need to work on tools to get there."**
- **In previous surveys, spirituality was named as important to members and is important to younger members. (making a statement about the representative nature / interpretation of the survey data)**
 - o **Caitlynn to write a sentence about the younger adult ask for spirituality.**
 - o **We want to make sure that is accurately reflected for the new minister.**
 - o **Bill has been bringing a lot of spirituality and spiritual language into the pulpit.**
- **RE: we didn't actually hear from the folks who are involved in RE, esp. in this year when staying engaged in family ministry was more difficult.**
 - o **Respondents were not necessarily engaging with RE**
- **People are finding the holiday services important as evidenced by showing up.**
- **Ryan to submit final draft for review after meeting with the MSC.**

3. **Discuss Ryan's upcoming meeting with the MSC - items to highlight?**

- **Process coordination to maintain communication regarding the work we're doing.**

4. **Plan November and December agenda**

- **Policy topics re: Cindy.**
- **8th Principle chat**
 - o **Paula Cole Jones Assessment?**
 - o **Applying recommendations from Widening the Circle of Concern**
 - o **Generative Discussions thinking about pillars of our work and how they interact with / are changed by 8th P.**
 - **Eval of ministry / board self eval**
 - **Policy based governance – talking to other boards and finding out other ways to govern**
 - **What to be looking for in our bylaws and policies**
 - **Etc**
- **Agenda:**

- **Generative conversation about how to do our work together? Exploration to the point of knowing what questions we want to ask an expert.**
 - **What are some areas of curiosity / talking points to bring to other boards?**
 - **Tension between feeling financially secure and church's mission. How do we manage finances while living with *uncertainty*?**
 - **Important/generative conversations at the top when we have more energy.**
5. **Other items?** – Caitlynn will send collected policy dates to Mindy for formatting.
6. **Process Observation:** (comments by all)

FIRST UNITARIAN CHURCH OF PORTLAND BOARD OF TRUSTEES

Communications Committee

October 12, 2021 Meeting

Minutes (DRAFT)

The meeting convened via Zoom at approximately 6:30 pm. Attending were Theo Harper (Chair), and Alan Comnes.

Opening and closing words were shared by Alan (Words by A. Gorman, M. Angelou)

October Moderator Letter. Alan offered to draft a letter to give to Moderator/Mindy upon her return ~10/16. Topics:

- Annual pledge drive—Board members are reaching out.
- Church draft goals adopted by the Board in October meeting to be presented to the congregation.
- Announcement of Forum on Church Goals (discussed below)
- Board Work on the 8th principle

Board Led Forum on Church Goals. Theo to check in w/ Tom D. for feasible dates; hopefully either Nov 7th and 14th. Will also plan to have a subsequent working session to develop agenda for the forum. (working session held on Oct 26, 2021)

Board Response (Additional Work to Live Into) the Eighth Principal. Need for a road map to keep momentum with the Board. Ideas discussed:

- Use resources developed by UUA and/or for UUs. Consider
 - “widening the circle” (copyright 2020)—used by other congregations as a “tool” or “resource” for moving toward the 8th principle. Theo offered to provide excerpts for the next Board mtg.
 - voices / work of BIPOC scholar. Assign a reading to the Board, such as “How to be an Anti Racist” or “Caste”
- Hold a generative discussion in Jan or february.

Meeting adjourned at approximately 7:45 pm.

Respectfully submitted,
Alan Comnes

Board Forum on Church Goals

November 14, 1:00-2:15 pm (via Zoom)

Draft Outline

(Prepared at Comm Comm Working Session 10/26/2021)

I. 12:45 **Welcoming** (Light the Chalice [Alan C.] / Short reading [Cindy C?])

II. 12:50 **Intro Comments by Moderator** [Mindy].

Priorities for this year:

Emerging church

8th principle

Support MSC + Ministerial Transition,

III. 12:55 **Present Participating Board Members** who are present. [Since it's the first time that the Board has sponsored an event this year] Each Board member briefly:

Make a short introductory statement. (How long with church, on the board, what committees you're on, what you love about the Board (?))

Suggestion to keep things moving: each Board member calls out the next member

IV. 1:10 **Presentation on Goals:**

What we heard during our congregant input process

Key slides from the presentation

How we engaged: survey, outreach to specific groups w/in the Church

Note how many responses we got and thank everyone who participated.

And, with no further ado, the Church Goals:

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- Create a long-term plan for development and sustainability of the church campus given congregational needs and resources, community needs, and the evolving dynamics of downtown Portland.

- Enhance and promote an ever-growing culture of generosity and financial sustainability.

- V. 1:25 **Small Group Exercise.** Questions for the participants:
- [make Goals visible in the chat]
 - [Group picks a note taker/reporter to the whole afterwards]
 - What questions do you have/what can we clarify? (Board member should be prepared to also take notes; particularly, to take back Q's to Board. Shouldn't feel obligated to answer [i.e., don't make up answers ☹])
 - What are we missing?
 - How would you see living into the 8th principle impact the way we work toward all of our goals? (Feel free to focus on 1-2 goals.)
- VI. 1:45-2:00 **Reconvene as a Whole**
Small Groups Report Out
Closing Words

**First Unitarian Church
Portland Oregon
Finance Committee Minutes
10/27/2021 5:00pm**

Attending Board of Directors committee members: Leila Wrathall, Andy Wilson, Mindy Clark, Marilyn Mays

Non-Voting Board members, committee members, and Congregants: Ed McClaran, Stan Jewett, Jo Ann Foor, Pat Malone

Staff: Kathryn Estey, Zaida Cooper

Call to Order at 5pm

Opening words from Andy Wilson

“Secret World” by Peter Gabriel

Agenda reviewed by Andy Wilson

M/S/C approval of September minutes

Report from Pledge Process Audit (Accounting Advisory Team)

Pat Malone reported on the accounting advisory committee audit of the Pledging systems of the church. A congregant had raised a concern as a result of errors in their pledge. The report indicated that the process is complicated, utilizing Raiser’s Edge, VanCo, and AccPac with reconciliation necessary across these systems. A random sample of 40 congregant accounts was reviewed by the audit team and no substantive errors were found. The team therefore believes there is no ongoing or systemic problem. However, Pat Malone indicated that mistakes will happen, and that staff works hard to reconcile across multiple pledging and accounting systems. The multiplicity of ways to pay pledge contributions exists, in part, to let congregants find their most comfortable methods and timing. The members of the Accounting Advisory committee and the Finance committee and others present were disinclined to limit the opportunities for pledging.

Release of the pledge process audit document was discussed. Consensus opinion is the executive summary will be distributed to the Board, whose members may request the full document if interested. Consensus opinion is also the executive summary may be shared with the original reporting congregant. Pat Malone will join Andy Wilson on a phone call to the congregant to discuss the resolution to their concern.

September financials (Kathryn and Zaida)

Discussion included a plan in the future to have the financial statements out to members of the committee prior to the meeting. Andy and Kathryn will work that out going forward. After a review of Revenue and Expenses there was a review of the report available from Raiser's Edge as well, helpful given the prior discussion about pledging. The Raiser’s Edge report shows pledge-year-to-date information on (a) pledges made and (b) contributions actually received.

Going forward Kathryn plans to distribute the Raiser's Edge report with the Board packet.

Congregant Update Forum 10/17/2021

Much of the discussion at the Forum was centered on plans going forward for re-opening the church. The financial information seemed well received.

No Other business was discussed

Closing words from Andy Wilson

Jo Ann volunteered to provide words for November

Meeting adjourned at 6:30

Submitted by Marilyn Mays

First Unitarian Church						
Year-To-Date Summary						
For the 3 periods ending September 30, 2021						
Operating Fund						
	ACTUAL OPERATIONS YEAR TO DATE	ACTUAL OPERATIONS YEAR TO DATE	ACTUAL VARIANCE	BUDGET YTD	BUDGET VARIANCE	ANNUAL BUDGET
	30-Sep-21	30-Sep-20	FY 2022 TO 2021	30-Sep-21	30-Sep-21	FY22
Church Operations						
Operating Income						
Pledge Income - 2020	-	271,446	(271,446)	-	-	
Pledge Income - 2021	254,303	71,843	182,460	201,700	52,602	641,622
Pledge Income - 2022	-	-	-	(15,356)	15,356	832,573
Contributions	12,095	24,668	(12,573)	25,500	(13,405)	102,000
Program Income	650	39,991	(39,341)	12,715	(12,065)	43,000
Rental Income	93,255	90,159	3,096	91,283	1,972	336,632
Other Income	2,459	1,025	1,434	625	1,834	2,500
Special Donation	-	1,000	(1,000)	-	-	
Transfer from Foundation	-	-	-	-	-	73,000
PPP Funding	275,421	-	275,421	-	275,421	
Total Operating Income	638,183	500,132	138,051	316,467	321,716	2,031,326
Operating Costs						
Payroll Expenses	354,163	370,263	(16,101)	390,335	(36,172)	1,564,313
Reimbursible Expenses	-	1,099	(1,099)	-	-	
Occupancy Expense	45,922	40,728	5,193	51,100	(5,178)	204,400
Program Expense	29,530	30,849	(1,319)	46,927	(17,398)	244,868
Rental Expense	1,258	239	1,018	1,130	128	4,520
Administration Expense	14,695	12,007	2,688	15,788	(1,092)	63,150
Interest Expense	-	-	-	-	-	
Other Expense	-	-	-	350	(350)	1,400
Total Operating Costs	445,566	455,185	(9,619)	505,630	(60,063)	2,082,651
Net Church Operations	192,616	44,947	147,670	(189,163)	381,779	(51,325)
Reserve Account Deposits						
Annual Operating Reserve	10,157	10,733	(577)	10,157	-	40,627
Total Reserve Deposits	10,157	10,733	(577)	10,157	-	40,627
Net Church Operations After Reserve Deposits	182,460	34,213	148,246	(199,320)	381,779	(91,952)
Investment Income						
Net Property Income (Expense)	-	-	-	-	-	
Dividend & Interest Income	483	699	(216)	-	483	
Realized Stock Gain (Loss)	-	-	-	-	-	
Unrealized Stock Gain (Loss)	-	-	-	-	-	
Net Investment Income (Loss)	483	699	(216)	-	483	
Operating Surplus (Deficit)	182,942	34,912	148,030	(199,320)	382,262	(91,952)
Reserve Account Transfers						
Justice Begins At Home	0	0	0	0	0	14,311
Hessler-Deale Women in Ministry	0	0	0	0	0	2,000
Chesney-Deale Intern Minister Fund	0	0	0	0	0	15,000
Anniversary Fund OnPoint	0	0	0	0	0	2,500
Major Donor Reserve	0	0	0	0	0	29,527
Tax Rebate -Ministers/Staff Transitions	0	0	0	0	0	28,614
Total Reserve Deposits	0	0	0	0	0	91,952
Net Church Operations After Reserve Depos	182,942	34,912	148,030	(199,320)	382,262	(0)
PPP Funding Adjustment	275,421	-	275,421	-	275,421	
Adjusted Net Church Operations	(92,479)	34,912	(127,391)	(199,320)	106,841	

First Unitarian Church					
Monthly Operating Summary					
For the 3 periods ending September 30, 2021					
Operating Fund					
	ACTUAL OPERATIONS CURRENT MONTH	ACTUAL OPERATIONS PREVIOUS MONTH	OPERATIONS MO to MO VARIANCE	BUDGET CURRENT MONTH	BUDGET VARIANCE
Church Operations					
Operating Income					
Pledge Income - 2021	94,294	79,777	22,517	67,233	27,061
Pledge Income - 2022	-	-	-	-	-
Contributions	4,963	2,850	2,112	8,500	(3,537)
Program Income	300	175	125	3,158	(2,858)
Rental Income	27,572	27,861	(289)	27,261	311
Other Income	-	-	-	208	(208)
Special Donation	-	-	-	-	-
Transfer from Foundation	-	-	-	-	-
PPP Funding	-	-	-	-	-
Total Operating Income	127,129	110,663	24,465	106,361	20,768
Operating Costs					
Payroll Expenses	120,793	119,224	1,569	130,112	(9,318)
Reimbursible Expenses	-	-	-	-	-
Occupancy Expense	14,726	14,903	(177)	17,033	(2,307)
Program Expense	12,361	9,261	3,100	17,144	(4,783)
Rental Expense	300	300	-	377	(77)
Administration Expense	3,118	6,739	(3,621)	5,263	(2,145)
Interest Expense	-	-	-	-	-
Other Expense	-	-	-	117	(117)
Total Operating Costs	151,298	150,427	871	170,045	(18,747)
Net Church Operations	(24,169)	(39,764)	23,594	(63,684)	39,515
Reserve Account Deposits					
Annual Operating Reserve	3,386	3,193	192	3,386	-
Total Reserve Deposits	3,386	3,193	192	3,386	-
Net Church Operations After Reserve Deposits	(27,555)	(42,957)	23,402	(67,069)	39,515
Investment Income					
Net Property Income (Expense)	-	-	-	-	-
Dividend & Interest Income	155	168	(13)	-	155
Realized Stock Gain (Loss)	-	-	-	-	-
Unrealized Stock Gain (Loss)	-	-	-	-	-
Net Investment Income (Loss)	155	168	(13)	-	155
Operating Surplus (Deficit)	(27,400)	(42,789)	7,389	(72,188)	36,788
Reserve Account Transfers					
Justice Begins At Home	0	0	0	0	0
Hessler-Deale Women in Ministry	0	0	0	0	0
Chesney-Deale Intern Minister Fund	0	0	0	0	0
Anniversary Fund OnPoint	0	0	0	0	0
Major Donor Reserve	0	0	0	0	0
Tax Rebate -Ministers/Staff Transitions	0	0	0	0	0
Total Reserve Deposits	0	0	0	0	0
Net Church Operations After Reserve Deposits	(27,400)	(42,789)	7,389	(72,188)	36,788

First Unitarian Church											
Dashboard Report											
September 2021											
CAMPAIGN MONTHLY TRACKING											
Pledge Drive Statistics	2022 AFD	2021 AFD	2020 AFD	2019 AFD		**FOR REVISION					
As Of	07/31/21	07/31/20	07/31/19	07/31/18							
All Members--											
Pledge Goal	-	1,535,000	1,600,000	1,506,750							
Pledges Received	-	-	4,368	1,448,399							
Percent of Goal	#DIV/0!	0.00%	0.27%	96.13%							
Pledging Households	-		896	954							
Average Pledge Received	-		1,625	1,518							
Payments Received	-		773,104	791,425							
Percent of Pledge	#DIV/0!	#DIV/0!	17699.3%	54.6%							
Attendance	'Sep 21	'Sep 20		**Sep 19	**Sep 18						
For the month (in sanctuary + livestream)	1,753	2,590	-32.32%	3,136	3,550						
Total LiveStream (included above)	1,753	2,590	-32.32%	441	517						
Total for the Fiscal Year	5,002	7,245	-30.96%	7,786	7,911						
Average per Sunday for month	351	518	-32.32%	627	710						
Average per Sunday YTD	385	557	-30.96%	599	609						
** = 5-Sunday month	**Easter included	**Easter included		**Easter included	**Easter included						
Christmas Eve/Solstice (Livestream)											
New Members	Jul '21 -Jun'22		Jul 20 - Jun '21								
Enrolled	0	-100.00%	8		-						
Number of Pledges Received	0	-100.00%	6								
Total Amount of Pledges Received	0	-100.00%	2,080								
Average Pledge	0	-100.00%	347								
Plate Contributions	FY22	Recipient(s)		FY22	Recipient(s)						
Jul	1,353	Black & Beyond Binary Collaborative		Jan							
Aug	2,015	Various UU groups		Feb							
Sep	3,072	GCCLP; SOAR		Mar							
Oct				Apr							
Nov				May							
Dec				Jun							
				Fiscal YTD	6,440						
Aug 2021 recipients											
TRUUsT (Transgender Religious Professional UUs Together)		794									
AUUMM (Assn for UU Music Ministries)		437									
UU-UNO (Office of the United Nations)		437									
DRUUMM (Diverse & Revolutionary UU Multicultural Ministr		346									

<i>First Unitarian Church</i>	
Statement of Cash Flows	
For the Month Ending 9/30/2021	
Beginning Cash & Equivalents Balance	1,695,422.80
Receipts	
Pledges & Contributions Received	91,256.54
Rents Received	27,572.30
Program Receipts	605.00
Interest/Gain-Loss on Investments	(5,687.35)
Increase/Decrease Accounts Receivable	(151.25)
Total Receipts	113,595.24
Payments	
Payroll/Taxes/Benefits	(120,793.18)
Operating Expenses	(26,004.90)
Program Expenses	(4,753.22)
Increase/Decrease Prepaid Expenses	1,620.85
Acquisition of Property & Equipment	380.00
Increase/Decrease Accounts Payable	(8,143.07)
Miscellaneous Expenses	(103.52)
Total Payments	(157,797)
Net Cash In/(Out)	(44,201.80)
Ending Cash & Equivalents Balance	1,651,221.00

First Unitarian Church			
Notes to Financials September 2021 (department transactions greater than \$2,000)			
OPERATING INCOME			
Pledge income	YTD pledge income above budget		52,602
	Month pledge income above budget		27,061
Non-pledge contributions	YTD receipts below budget		(13,405)
	Month receipts below budget		(3,537)
Rental Income			
Tenants			27,561
OPERATING COSTS			
Unallocated Expenses (Hybrid-In Person Svc)	Choir mask purchases		(2,385)
Occupancy			
Repairs & Maintenance			2,084
Utilities			8,085
DASHBOARD			
New members			0
New pledges received			0
CASH/SECURITIES BALANCE			
MJS Lecture Series	investment loss		(5,732)
Hessler-Deale	Carter Smith's moving expense + investment loss		(1,317)
Fund 49 (Designated)	Active Accounts		
Auction			10,840
YRUU			18,907
Emergency Fund			33,508
Alliance			10,348
13 Salmon Shelter			13,721
Social Justice (Police Accountability)			10,775