

Welcome

The Road Ahead 2026



*an informational town hall
for the UUC community
February 8, 2026*

Why Are We Here – Looking Ahead

- **Milestones, Ministerial Transition & Rev. Doug Reflections**
- **What We Mean by Stewardship**
- **UUC Financial Position: Snapshot**
- **Meet Tamar Lively, Executive for Finance & Operations**
- **Annual Giving Campaign Preview**

Milestones & Reflections

Ministerial Search & Transition

- Candidating Week & Vote to Call New Minister – April
- Prepare to Welcome
- Interim Minister Leaves
- August Start for New Minister

Budget Development & Fundraising

- March through June Congregational Meeting

New Elected Leadership

- June Congregational Meeting

Additional Observations & Thoughts.....



Living in right relationship with the gifts we are given in life.

Sharing these gifts in a spirit of gratitude, joy, and possibility.

**Not just the work of a committee, it is our shared work in
& on behalf of this community.**

**When we are seen, heard and invited to participate in the life &
purpose of UUC, our glad giving is an affirmation of our
commitment to this community.**



This Church is a Community of Ourselves...

We are All Stewards...

- **Taking care of what we value**
- **Sharing TIME, TALENT & TREASURE**
- **Supporting our community, our staff, the UUC home, etc.**
- **Ensuring UUC's future for those who follow us**
- **Putting values into action – GENEROSITY is a core UU value**

DID YOU KNOW....

Snapshot Primer on UUC's Finances



‘Structure’ of UUC Finances

Annual Operations

Operating Reserves

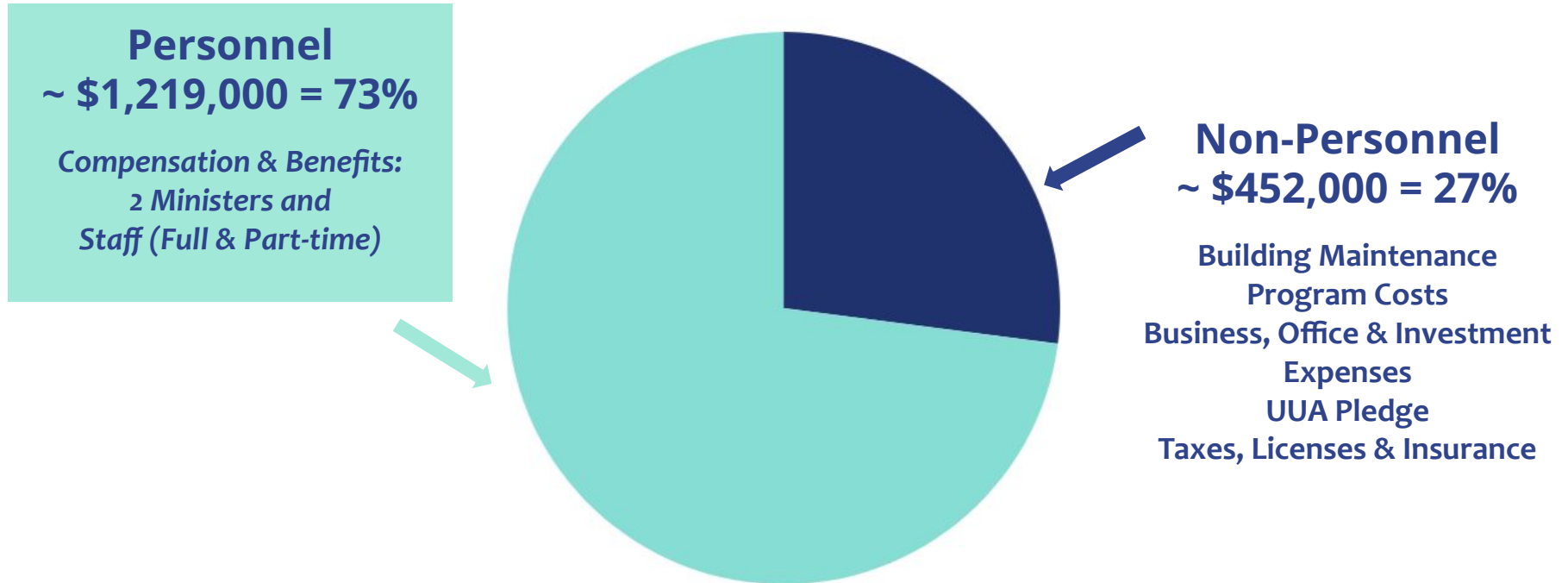
**Investment Funds:
Endowment, Legacy
Gifts, Camilla’s Circle**

**Capital Reserves
& Projects**

**Special Initiatives
(Projects, Partnerships, etc.)**

Operations 2025-2026: Where Gifts Go

Approved Budget \$1,671,000



FY 2025-2026 Sources of UUC Support

Current Budget = \$1,671,000



Pledged Gifts
72%



Endowment
21%

*Special Gifts,
Other Donations*



*Program Fees, Interest,
Rentals*

Other
7%

Endowment & Legacy Gifts

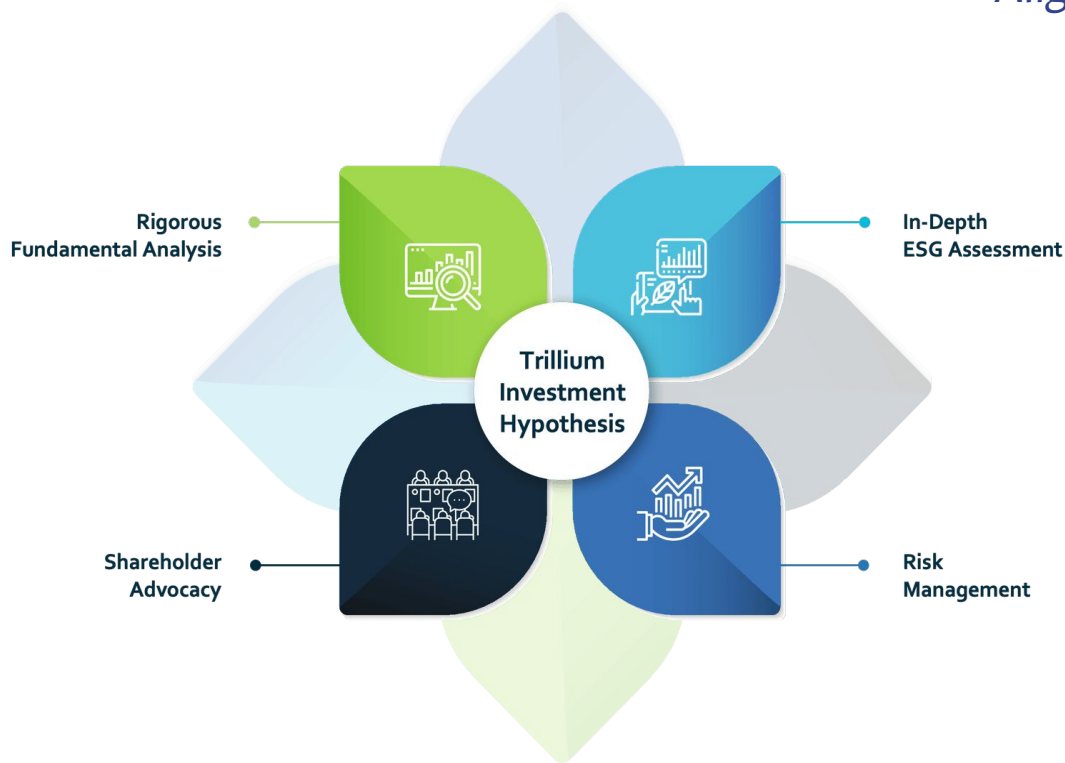
Supporting ~21% of Operations

- ~\$9M invested with Trillium
- Typical annual support is 4% of total value
- ~\$345K in current year budget

Our endowment dollars are working for us every day at UUC!

Trillium Asset Management Approach

Aligned with our values



ESG =
Environmental, Social,
Governance

Welcome Tamar Lively

New Executive for Finance & Operations



Early thoughts and observations so far... ..

What About Next Church Year?

Budget Process & Timeline

- **Deep dive to understand**
 - Current operational expenses & next year's needs
 - Capital needs – near-term and longer term
- **Iterative budget development with Finance Committee, Executive for Finance & Operations (Staff), Stewardship Committee, Board**
- **Road Ahead, Part 2 – May**
- **Budget proposal solidified by May**
- **Approval by Board, then to Congregation for vote at June annual meeting**

What to Expect for FY 2026-2027?

25-26 FY budget just under 1.7 million

- **Aim: Support full staffing (current model) & effective operations**
- **Expect budget increase (possibly \$1.8 million+)**
 - Compensation adjustments & COLAs
 - Employee benefits increase
 - Infrastructure upgrades, etc.
- **Will rely on pledged gifts, endowment support, & special gifts**

Call for Stewardship Giving – The Why

With our pledges this year, we ensure UUC is a refuge of hope, comfort, and connection.

In these unprecedented times, we faithfully show up for one another and the wider community.

Encouraged by this spirit of possibility, we are ready to welcome a new minister.



March is Pledge Month

This year (2025 – 2026) ...

~\$1.2M pledged gifts

Supporting 71.8% of budget

332 pledges

Pledges range from \$5 to \$62K

Median pledge is \$1,200

EVERY gift is cherished & important!

March is Pledge Month – What to Expect



- **Fundraising & Participation Goals (Tentative)**
 - \$1.25 to \$1.3 million
 - 350 pledges
- **Community engagement to invite everyone in!**
- **Streamlined pledging & giving processes**
- **Updated web pages**

EVERY gift matters – THANK YOU!

Thank You for Attending from

Stewardship Committee

Finance Committee

Board of Trustees

Reverend Doug Wadkins

Tamar Lively

We'd Welcome

Your Questions, Feedback & Involvement

We Want Your Feedback & Suggestions....

Look for follow-up survey

- Did this session help you better understand how 'money things' at UUC work?
- What more would you like to learn?
- How can best communicate with the congregation as we head into the coming year?
- What do you hope the Board of Trustees, Finance Committee and Stewardship Committee would consider regarding our budgeting, financial and fundraising processes and practices over the next 1–3 years?
- Would you consider being more involved in this work?

Reflections from Reverend Doug

Move Toward Shared Leadership

- Continued Adaptation to Staffing Changes
- Activating Volunteers as 'Stewards' of All Things UUC

Welcome Newcomers & Deepen Engagement with UUC

- Continuing Focus on Family Ministry
- Building Beloved Community

UUC's Work in Wider Community

- Social Justice Efforts
- Exploring Faith Land Initiative

Additional Observations & Thoughts