

2019-2020 ANNUAL REPORT OF THE CONGREGATIONAL ADMINISTRATOR, Karen St. Peter

As I reflect back on the end of this congregational year, it seems to have gone by very quickly. It was an unusual year, of course, mainly due to COVID-19, but successful nonetheless. Below are items I believe the Board and Congregation would be interested in knowing about my role this year:

- Working from home has been running very smoothly. I'm able to close the books each month with Mary Alice Kimball (Treasurer) over the phone, and what was set in place last year with regards to better budget recording, classification of accounts and category revisions has been helpful with UUCSC's budget and financial record keeping.
- I have made progress with organizing computer files according to the records retention policy when I have "down time". Paper files will have to be tackled when I am physically back in the office.
- All congregational emails have switched from Gmail to Constant Contact, the same platform the weekly e-news uses. I have successfully learned how to use constant contact, which also gives great metrics.
- I was able to start writing a monthly article for Soul Matters, to give congregants ideas for movies, books and information regarding the theme each month (Soul Matters is a "themed" ministry which many UU congregations use to focus on a topic each month, such as wisdom or integrity). After mid-March, this was no longer needed as worship themes changed from being a certain topic each month to reflect the current state of the world each week.
- The UUA certification process (February) and RI Annual Report (June), as well as vendor contracts (for example, heating oil price lock-in) were all completed on time. The contract with our cleaning service was not renewed due to budget constraints, however volunteers stepped up in order to take turns cleaning the building while it was still occupied.
- Support was provided to committees as requested, such as Membership, Stewardship, OLLy, Finance, Wellness and others with updating documents, records, calendar reservations and basic administrative support.
- I have been able to provide Rev. DL with more administrative support, so he can focus more on worship, pastoral care and serving the congregation in general.

As the Annual Meeting will not be taking place until the end of September, I will work with the Board starting mid to late August as how to best prepare for that, and if it will still take place in person. Normally we provide all materials in a mass mailing at least two weeks ahead of time, however, I will await the Board's decision on how to handle sending all materials – either electronically or the normal way (US mail).

In July, I will be working with Mary Alice to officially close the books for the congregational year (reconciliation). Because my hours are reduced in the summer, and because Rev. DL will be working, I will not be able to take on any additional activities besides my "normal" day to day ones:

- Tracking and recording income and expenses, monthly reconciliation of books, paying bills
- Providing administrative support to Rev. DL
- Assisting committees that are still working over the summer with their administrative needs (Finance, for example, will need assistance with the PPP loan documents)
- Responding to email and voicemail
- Scheduling virtual meetings
- Keeping my "home" office organized so that when I am back in the UUCSC office, there is a smooth transition of files (paper and electronic files on the backup drive I am using, since I have the office PC at home) in order to have all documents that need to be printed ready to go and then filed, according to the record retention policy

Thank you for your support, and I hope you all have a great summer!

Kind Regards,

Karen