

## OPERATIONS REPORT – MARCH 2023

### PERSONAL UPDATE

MARCH 21

By the time of the Board meeting, I will no longer be wearing a heart monitor. My heart rate has been well controlled by medication. I get to take a stress test on the 27th so we can check for any other issues, but I'm hoping that meds will keep things relatively controlled. I am being much more conscious of how much I put on my schedule, especially around those times when I'm called on to use my "extrovert" skills. I added new tasks to Trisha's plate (taking over the creation of livestream creation and scheduling), which she has handled beautifully.

### SANCTUARY PROGRESS

Hector and son Hector Jr have completed the sanctuary Rehab project-- removing the false beam, patching all the cracks with new tape and mud, and painting with the new shade selected by the Aesthetics Team. Thanks to Hector, we have some Sanctuary Funds that will not be used. *If it is OK with the Board, I will ask a donor if their remaining funds designated to the Sanctuary Rehab can be re-allocated to choir/chancel chairs, to ensure we can fund all chairs + shipping.*

Since my own health intervened, I have not moved forward on choir chairs. However, our old carpet comes out next week on the 27th, the hearing loop goes down, and new carpet goes in before Sunday, April 2nd. Wednesday of that week is to be the loop completion day, and I am hoping that we will be able to use the choir rehearsal for testing of the system. While we won't have new chancel/choir chairs for Easter, I have hopes that all the sponsored projects will be completed by UUTC's birthday on June 6th. Please be warned that the building will be a hot mess next week, and if you have meetings, you may want to try to move them outdoors or to the Chalice House!

### FINANCIAL EXAMINATION

In researching guidelines on records retention, there will be a few things we would not have to keep beyond 3 years, but they are minuscule (physically) in relation to the mass of the things we must retain. The only way forward, it appears, is to begin archiving to the cloud for items beyond 3 years, in order to free up physical storage space. Cloud archiving of older (already reviewed) records will help us deal with the limitations of our space and file cabinets more effectively.

I have spoken with Trisha and reached out to Eloise — Eloise can train Trisha on proper filing (it's in her job history). I have also brought them both up to speed on the need to archive these things to Google Drive. I have asked Eloise to set that structure up within Drive, and to ensure that Trisha knows how to archive things properly for later access as needed. Once archived, the older records can be shredded, and we can get more current records into file cabinets, enabling the examination. I suggest that we double up on that exam, hitting records from the last two fiscal years.

I gave a little thought to boxing up older records, but that will make it harder to archive them, and we still have no locked space where we could put them, regardless. I'm providing, along with this

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document, the agenda and note from our last examination for a better understanding of what is required.

### GROW GETTERS

This group is pretty excited about the landscape design! UUTC's APPTC fund will be reimbursed by a member of that group for the costs associated with the professional design fees (which have totaled \$990). Lower cost plant identification markers have been identified, allowing the group to direct monies to other costs for the grant project completion. Pi Day, to date, has brought in \$1172, with \$80 still to come in, so we will nearly match last year's total. This year's event brought in many new faces, and it looks like this will be a reliable revenue stream for the Grow Getters as they work towards certified habitat status and other projects on the campus.

### WAYFINDING

To reduce my workload, we are making the WayFinding a quarterly publication. The UUpdate and other communications are meeting most needs of the congregation, and quarterly publication should mean that we can make it more of a strategic document. The next issue will come out next week. This also reduces the workload of Board Presidents and Rev. Bob... though I'm going to have to check our policy manual again about whether Board Presidents can truly be off the hook! Monthly announcements about the minutes from Board mtgs will need to go out through the UUpdate.

In Covenant, RK