

First Unitarian Church of Rochester
220 Winton Road South
Rochester, NY 14610
Tel: 585-271-9070
www.rochesterunitarian.org



Photo Courtesy of Jo Cardin, photographer

ANNUAL REPORT

FISCAL YEAR 2016-17

At First Unitarian Church, we create spiritual connection by listening to our deepest selves, opening to life's gifts, and serving needs greater than our own...every day.

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STAFF AND BOARD OF TRUSTEES

SENIOR STAFF

Rev. Joel Miller, Interim Senior Minister
Rev. Tina Simson, Minister of Pastoral Care and Adult Spiritual Development
Rev. Carlos R. Martinez, Interim Assistant Minister
Sheila Schuh, Director of Religious Education
Thom Snell, Music Director
Carol Anne Cleary, Office Administrator
Allen Gundlach, Database and Finance Director
Rita Capezzi, Interim Intern Minister at UUC

SUPPORT STAFF

Williams Hayes, Sexton
John Grego, Sexton
Marjorie Bovenzi, Religious Education Administrative Assistant
Laurie Collins, Evening Administrative Assistant
Heather Olson, Evening Administrative Assistant
Dana Lundquist, Director of Junior High Youth and Coming of Age
Jerry Ingram, Youth Ministry Coordinator
Chris Lim, Audio Visual Technician
Kimberly Joy, Bookkeeper
Jan Cook, Sunday Mindfulness Coordinator
Kristen Rogers, Sunday Director of Early Childhood
Shannan Foos, Sunday Childcare Provider
Emma Kilmer, Sunday Family Membership and Workshop Coordinator
David Chamberlain, Sunday Sexton
Zachary Zwahlen, Organist

AFFILIATED MINISTERS

Rev. Lynn Aquafondata
Rev. Libby Moore

BOARD OF TRUSTEES

President: Barbara de Leeuw; Vice President: Chris Graziano; Treasurer: Anne Perry; Clerk: Linda Friedman; Trustees: Mary Moglia-Canon, Jill Poremba, Dave Burnet, Jo Cone, John Solberg, Nicole Delgrosso, Paul Suwijn, Tim Farnum.

NOMINATING COMMITTEE

Irene Burnet, Ahlia Kitwana, John Farrell, Janice Hargrave, Dave Burnet (Board Representative)

PRESIDENT'S REPORT

The Change Train is Moving! **by Barbara de Leeuw, President of the Congregation**

Someone asked the other day... "What does the Board of Trustees (BOT) *DO*"? There is a broad description in the By-Laws, but the Governance Policies offer a better explanation of our month-to-month work.

Governance Policy (section 4.1) says "The BOT approaches its task with a style that emphasizes strategic leadership rather than administrative detail, the future rather than the past or present, proactivity rather than reactivity and with a clear distinction between the board and the staff roles".

It then highlights 8 key points (paraphrased)... focus chiefly on long term Ends ("desired results"/goals") and the broad organizational vision, govern with excellence, be accountable to the congregation for competent, conscientious and effective accomplishment of our obligation as a body, monitor process and performance, ensure continuity through board training and orientation, instigate new policy when needed and inform the congregation in a timely manner of major policy decisions. There is also a list of "things to do."

Board highlights of 2016-17:

Strategic leadership, future focused vision and long-term goals

The board was strategic, future focused and proactive. We directed our energy toward rebuilding... financial stability, organizational resilience and identity, and social engagement in a healthy community. These were the ultimate filters.

The board hired a highly trained and experienced, Accredited Interim Senior Minister, Rev. Joel Miller. He has the expertise, knowledge, skills and temperament to help us accomplish our goals. Rev. Joel joined us in July 2016 ready to listen. He brought all of his expertise to the immediate tasks at hand... getting to know us and understanding our needs.

Early in the year, the Board supported the integration of the traditional UUA interim ministry goals of defining: our heritage, our identity-who we are, leadership structures, use of resources, vision & stewardship with the Brubaker recommendations to: celebrate what's good, revisit governance model, restructure senior minister role, enhance two-way conversation, engage conflict well, foster intergroup connections, deal with grief and loss, and sustain church finances. Take the time to review the Brubaker recommendations and note our progress. Hopefully, you have joined our "Change train". Our community still has a lot hard work to do before we start "searching" (for a new senior minister) again, but we are rolling in the right direction.

Communication and Accountability

The board expanded its accountability and interaction with the congregation. There were monthly board meeting summaries in the newsletter and dedicated articles written by staff and others about significant plans and decisions. In 2016-17, the board held 10 or more forums / talkbacks / listening sessions / roundtables, etc. to gather members' thoughts, feelings and ideas, in addition to a policy governance primer and a traditional 'person to person' canvass.

PRESIDENT'S REPORT CONTINUED

Monitoring, New Policies and Board Development

The Financial Advisory Committee to the Board of Trustees (FAC-BOT) provided professional expertise and substantial support to the Board in all financial matters. Thank you Anne Perry (chair), David Friedman, Lyn Kelly, Judy Oaks and Bob Wells. Your work was outstanding and your support invaluable.

The board supported the adjustments needed to maintain a balanced 2016-17 budget and kept a careful watch on the monthly financial condition. The staff is applauded for tightly managing their budgets. The board is very grateful to the generous donors who eliminated potential debt and unexpected shortfalls. These gifts to our community stabilized our financials. We appreciate our donors' deep commitment and thank you again.

There were scheduled reports at each board meeting on key indicators related to: the Ends, strategic and financial planning, financial condition, asset protection, staff compensation and benefits, grievances, membership, etc. These key reports monitored specific "vital signs" and provided an insightful and measured view of our organization's "health". They can also indicate challenges. Fortunately, there were none this year.

The board attended to long-delayed financial maintenance and developed new policies that offer greater clarity and transparency. Zero balance charter accounts and redundant bookkeeping accounts were researched and closed or merged and clear, unambiguous endowment policies were implemented. The investment policy, the Scholarship Fund charter and a variety of other charters were updated, revised or clarified. Again, FAC-BOT was very helpful.

After years of delay, the board was deeply committed to getting the roof replacement completed this year! Last fall, temporary roof patches reduced the number of leaks. Unfortunately, new areas failed during the late winter so we still had water dripping. Additional temporary patching was applied this spring. The Roof Tech team and the Roof Communication team kept the congregation informed as we systematically worked through Bero Architects' design process and contractor recommendations.

Very ably assisted by FAC-BOT, the Board developed a creative recommendation to pay for the roof replacement. The plan did not encumber our financial future, burden donors or incur debt. The congregation's roof funding approval was unanimous...perhaps a first?

Happily ... "Stop the Leaks" will be erased from our vocabulary by November 2017, when the new, completely weather appropriate, guaranteed for 30/40 years, properly installed, roof is completed. Spring Steel Metal and Roofing, the lowest bidder with the earliest completion date, has an outstanding reputation for excellence and professionalism. The nursery school and worship services will not be significantly disrupted.

For two years, the Board's Investment Committee has been working with Alesco Advisors on identifying investment funds that comply with First Unitarian's Investment Guidelines and that would replace funds that include fossil fuels with sustainable fossil-free funds. It appears that the church's investments will make inroads toward these goals as early as September 2017. Thanks to David Friedman (chair), Ron Steinman, Amanda Kish, Anne Perry, and special thanks to Annie McQuilken for moving us towards this goal.

The BOT regularly participated in board development. We held two half-day retreats conducted by UUA staff. We reviewed and discussed sections of our governance policies and made revision suggestions at

PRESIDENT'S REPORT CONTINUED

several meetings; and we used scenarios to help us think through solutions to hypothetical policy governance situations. We also made good progress staying focused on the Board's responsibilities.

In preparing this annual report, I reviewed all of my notes (all those notebooks I carried) from the past two years. Read as a collective whole they recall our recent history in detail. In a 2015 update, I indicated that *"the board is a great team and you (the congregation) are well represented by this diverse, deliberative and highly professional board"*... that was true in September 2015 and it is certainly true in June 2017.

I want to thank my current colleagues, Chris Granziano (Vice President), Anne Perry (Treasurer), Linda Friedman (Clerk), and board members: Jo Cone, Dave Burnet (past president), Nicole Delgrosso, Tim Farnum, Mary Moglia-Cannon, Jill Poremba, John Solberg and Paul Suwijn. Each managed a critical responsibility this year. Most of their work was invisible and only acknowledged as a "positive change" or "the good feeling" in our community. Please thank them for their excellent work. Chris, Jill, Linda and Mary will be leaving the BOT June 30.

I also want to acknowledge the retired members of the 2015-16 board John Dancy, Ira Srole, Jane Tuttle and Bob Wells. They, along with most members of the current 2016-17 board had extraordinary responsibilities in 2015-16. They were diligent, skillful and committed to excellence. Thank you all.

I want to recognize Linda Friedman for her long and meritorious service as clerk (the history keeper) to our board, the many previous boards and our congregation. Thank you, Linda, for being the keeper of history, the bearer of wisdom and years of dedicated service.

And to each of you...who worked, organized, participated, created, greeted, donated, taught, sang, played, typed, danced, answered phones, cleaned, chaperoned, attended, voted, pledged or completed any of the other tasks that make our church wonderful...Your work is recognized and appreciated! THANK YOU!!!

Finally, we should never underestimate the importance of our work together. When we, as a community, successfully accomplish our UUA interim/Brubaker goals, First Unitarian Church will attract highly talented and highly desirable ministerial candidates to our called Senior Minister position. As many of you know, the UU world is very small, keep that in mind when you chat with friends. Potential candidates are watching and following our every move through this process. So far, so good and our Change Train is picking up speed.

INTERIM SENIOR MINISTER'S REPORT

Interim Senior Minister's Report to the Congregation by Rev. Joel Miller, Interim Senior Minister

This Year's Accomplishments and Challenges

Senior Staff: First Unitarian's Senior Staff this past year were myself, Rev. Tina Simson, Rev. Carlos Martinez, Ursula Staneff (through Nov.), Carol Anne Cleary, Sheila Schuh, and Thomas Snell. I am grateful to work with First Unitarian's outstanding staff. They have been very effective in making this past year of transitions a success. They serve First Unitarian beautifully -- evident in the many successes in their reports to you this year.

Board of Trustees: First Unitarian's leadership has been a great partner in this year's transitions. I've so enjoyed working with Barbara de Leeuw, who led the congregation with courage, energy, deep commitment, and persistence. The depth and importance of her leadership has largely been hidden. Chris Graziano provided a strongly-grounded leadership, drawing attention to key issues at key moments. Anne Perry brought important new care and organization to the congregation's finances. Anne also has been essential in managing the congregation's operations after Ursula's departure. And Linda Friedman has been the voice of wisdom and experience in her 16 years of service as First Unitarian's Clerk. I've been a fortunate minister to work with these board officers and with Dave Burnet, Jo Cone, Nicole Delgrasso, Tim Farnum, Mary Moglia-Cannon, Jill Poremba, John Solberg, and Paul Suwijn, First Unitarian's Trustees.

I also want to thank John Solberg and Chris Graziano for leading this year's congregational conversations on Policy Governance.

Transition Team: The team this year assisted me in understanding the congregation as this interim work began. The Transition Team was largely drawn from the Reference Team that worked with David Brubaker, the consultant who worked with First Unitarian in the 2015-2016 year. I am grateful to Suzy Farrell, David Friedman, Chris Graziano, Ajamu Kitwana, Andy Poremba, and Jane Tuttle for their counsel.

Together We Thrive! The "Thrive Team" did a fantastic job this year with the Annual Budget Drive (ABD). The ABD is on-track to be close to or even meet the goal for this year. And from the pledges that have been made so far, the average increase is about 12%! This is quite an outcome for a first year of an interim ministry, and a year in which First Unitarian had TWO Annual Budget Drives. Co-chairs John Solberg and Paul Suwijn lead a great team that included Sue Ames, John Farrell, Cynthia Looney, and Louise Paulsen. Brubaker task #8 was in great hands this year!

Roof Replacement: This year the Roof Teams were essential for the massive roof-replacement project. The Roof Technology Team was Jo Cone, David Friedman, John Looney, John Parker, Anne Perry, Carolyn Rankin, and Paul Suwijn. And the Roof Communication Team, which is still active in letting the congregation know about the impending August/September replacement of the roof by Spring Sheet Metal and Roofing, is Sue Ames, Ken Buckle, and Tim Farnum.

Ken Buckle will be the congregation's observer during construction beginning this Summer.

INTERIM SENIOR MINISTER'S REPORT CONTINUED

The Contracted amount for replacing the roof is \$743,830.00. I expect that there will be additional expenses – hopefully very modest ones.

Interim Developmental Tasks: Central interim tasks this year included the current-year ABD, the current ABD for this coming year, restructuring staff operations, Healing Circles, the new website (Brubaker item #2 – thank you, Carol Anne!), and the roof-replacement project. I remain frustrated that I did not begin the interim work on Healthy Congregations this year. I was challenged by having taken on so much of the Business Manager's work, by the remarkable complexity of the roof-replacement project, and, this Spring, by the sudden (and long-deferred) opportunity to begin significant work toward racial justice. The work on racial justice is not, strictly, interim work. But it will be very complimentary work alongside the Healthy Congregations work around conflict next Fall.

Internship at Canandaigua: I have also been privileged to work with Rita Capezzi this year. Rita is the Interim Intern Minister at the Unitarian Universalist Church of Canandaigua, which had been partnered with First Unitarian for over 5 years. Like First Unitarian, the sudden departures of Rev. Kaaren Anderson, Rev. David Blanchard, and Revs. Marcus and Emily Harnet-Liefert were also devastating for the Canandaigua congregation. Rita's internship had been based on having Rev. Kaaren as Rita's supervisor. I was able to salvage the internship for Rita and for Canandaigua by replacing Kaaren. Canandaigua pays First Unitarian toward the cost of my time supervising this internship.

Ministerial Transitions: I am so pleased for Rev. Carlos Martinez that he has contracted to be the Interim Minister with the Community Church of New York City. He had to begin the search for another settlement after we realized that First Unitarian does not have (nor has it ever had) the resources to sustain 3 full-time ministers.

Budget 2017-2018: It will be a tight budget this coming year, even with the success of the ABD. And as the budget can't be fully finalized right now, the proposed budget is necessarily provisional. At the request of several members, I've made copies of a detailed budget available – you can pick these up in advance in the church office, email me to send you a copy, or at the Annual Meeting.

Next Year's Goals and Challenges

Senior Staff: This coming year Senior Staff will be Rev. Tina, Kimberly Joy (who will move from bookkeeping for First Unitarian into its Business Manager position), Carol Anne Cleary, Sheila Schuh, and Thomas Snell.

Restructuring the Congregation's Staffing: One of the Interim Developmental Tasks for this coming year was also goal #3 as recommended in the David Brubaker report of May, 2016: "Restructuring Senior Minister's role."

I cannot continue to do the business administration of the church next year. And while First Unitarian has had 3 ministers – it has either paid the costs for 3 ministers either by relying on non-sustainable funding or by under-compensating its ministers. I believe First Unitarian must have sustainable financial practices – and staffing practices.

I am daunted by the coming year with only two ministers in a congregation with 3 weekend services – even with a greatly expanded Worship Associate Team (a team recommended in item #1 in the Brubaker report).

INTERIM SENIOR MINISTER'S REPORT CONTINUED

First Unitarian does need to restructure its Senior Minister's roles – but doing this alone will only create future conflicts. The congregation must also restructure all its systems of accountability – not just for the Senior Minister (a sure way to cycle through ministers at a rapid pace), but also for the Board and for the congregation itself.

Toward the work of restructuring staffing management at First Unitarian, I have formed a Personnel Team. Tom Wetherell has agreed to chair this team.

Policy Governance: I realize that there has been some discomfort with the idea of Policy Governance. Forgive me for being blunt: when I arrived last July, I did not see any Policy Governance in use. My view is that the congregation can't judge the efficacy of Policy Governance since it has no recent experience with any actual use of it. I urgently recommend that First Unitarian re-establish its use of Policy Governance. I don't know of effective alternatives or I would point them out to you.

It will take more than a year or two to establish the kind of Policy Governance that is appropriately shaped for First Unitarian (Policy Governance is not a one-size-fits-all process). Re-establishing PG will be work toward the third interim task and is also the recommendation #2 in the Brubaker report.

Policy Governance also does NOT mean that decisions are made without substantial congregational involvement. One of my goals in creating the Personnel Team, for example, is to deeply involve members in the complicated work of good congregational staffing and hiring.

Healthy Congregations: Managing conflict will be an important Developmental Task for this coming year, and this was recommended work in David Brubaker's report (recommendation #5). First Unitarian has not managed its conflicts well throughout most of its history. There is, in my reading, a pattern of very successful ministries punctuated by damaging conflicts throughout First Unitarian's two centuries of existence.

A major Developmental Task in an interim ministry is to reflect on a congregation's history. First Unitarian will begin its first interim examination of its historical patterns this Fall, and I hope will consider how it might change this current pattern of conflict. Conflict is inevitable, but I recommend that the best pattern of conflict is having new and interesting conflicts (instead of recurring patterns), and then resolving them with respectful, direct, and open communication.

Grief and Loss: First Unitarian is a very successful congregation with a great history of influence and strong social justice ministries.

First Unitarian has been experiencing so much grief and loss, and Brubaker's #7 recommendation was to process this substantial grief and loss of Dick Gilbert, David Keyes, Helena Chapin, Ed Schell, Jen Crow, Scott Tayler, David Blanchard, Marcus Hartnett Liefert, Emily Hartnett Liefert, Kaaren Anderson, and now Carlos Martinez. And you've had departures of other staff members, too. My heart hurts for you in all these losses.

But there is also a larger trend in loss for you as a congregation – loss is a deeply-rooted issue for you as a congregation – which I think this is completely necessary for a congregation with a strong, proud history of Social Justice ministry. Social Justice is spiritually challenging because it is a ministry that comes with grief and loss. Social Justice comes with grief and loss because it is work that is never done, and because

INTERIM SENIOR MINISTER'S REPORT CONTINUED

we humans so often fail to live lives of justice. Grieving what is lost is humanly necessary to restore ourselves for the ongoing work of justice ahead of us.

This interim is a time to deeply consider how you want to consciously experience profound loss, and to grieve as a people. I urge you to do this. How else will you know the depths of your love unless you acknowledge the depths of your grief?

I believe this is the central theme of this interim. It is the central area of spiritual growth for you as a congregation right now. You have a proud history of a strong Social Justice ministry. Acknowledging your spiritual journeys as a people of justice – including your grief and loss -- will release even more of your energy to answer the call to justice that lives so strongly in you. And will be yet another way you influence Unitarian Universalism nationally.

HEALING CIRCLES REPORT

Healing Circles Report by Rev. Tina Simson

Listening to one another and allowing a safe space for healing is the work of interim time in a church community. Having a forum for this was also a recommendation from our Reference Team through their work with the congregation and Dr. Brubaker. We are fortunate at First Unitarian that we have an established practice of deep listening in our Soul Matters and UU Wellspring groups.

Rev. Joel and members of the Transition Team asked me to tap our skilled small group facilitators and design a program to help engage the congregation in this process of recovery.

The following church members attended the initial training session on October 29, 2016 and offered sessions throughout the church year: Jane Tuttle, Sue Steepy, Ellie Stauffer, Pat Harris, Libby Moore, Shannon Foos, Joe Simson, Rev. Joel Miller, Carolyn Dancy, and John Dancy,

From October through May, 16 sessions were offered to the congregation (7 sessions were cancelled for non-attendance), 53 members of our community participated. Sessions were also facilitated for the Board of Trustees, the Reference Team who worked with Dr. Brubaker, and RE Staff, bringing the total participants to 84. Three sessions were also facilitated at the UU Church of Canandaigua, including one for their Board of Trustees.

While this was a recommendation of the Reference Team and a vital part of Interim work, a relatively small number of individuals took advantage of this resource. Those who did reported that they better understood those with differing opinions and perspectives and that listening to one another without judgment was a helpful way to reconnect.

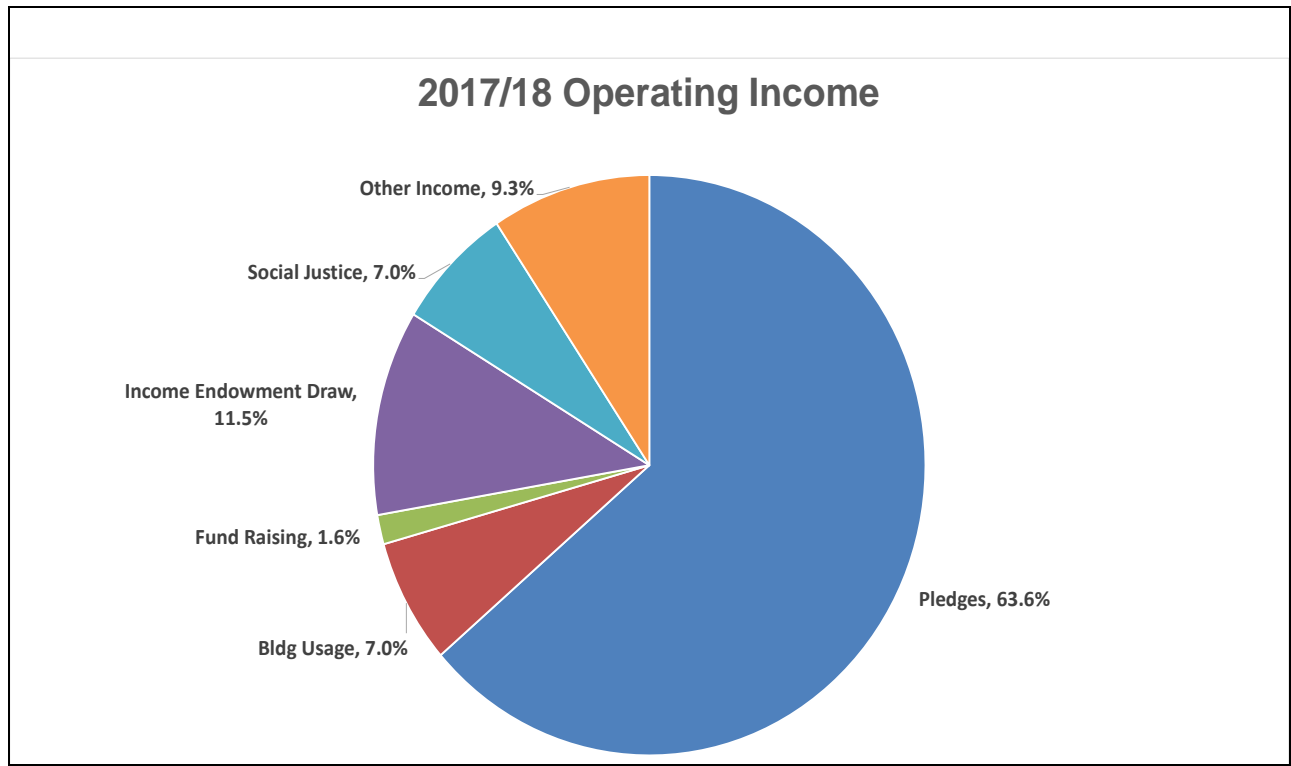
TREASURER'S BUDGET SUMMARY

2017/18 BUDGET Approved by the Board of Trustees For Vote at Annual Meeting of the Congregation, June 4, 2017

HIGHLIGHTS OF THE PROPOSED 2017/18 BUDGET:

- We have had a very successful pledge drive / canvass led by the Thrive Team. The increase from this year to next reflects the congregation's resilience and commitment.
- This Budget is sustainable and is still essentially an austerity budget.
- First Unitarian Church has never had the resources to support three ministers without use of one-time resources and/or under funding mandates of the bylaws.
- Some of the work performed by Rev. Carlos Martinez in membership/hospitality is provided for in this budget with a quarter-time coordinator.
- A quarter time social justice coordinator will devote most of that time to supporting the Schools Partnership that has had a coordinator for nearly all of its history. The loss of this position over a year ago has had a noticeable effect on the level of volunteers participating in the Schools Partnership.
- Landscape / gardening support has been restored.
- The Property Maintenance & Improvement Fund contribution has been restored to the level mandated by the Bylaws, which adds nearly \$40,000 to expense.
- Except for the Pledge Match, this budget does not rely on one-time contributions.

TREASURER'S BUDGET SUMMARY CONTINUED



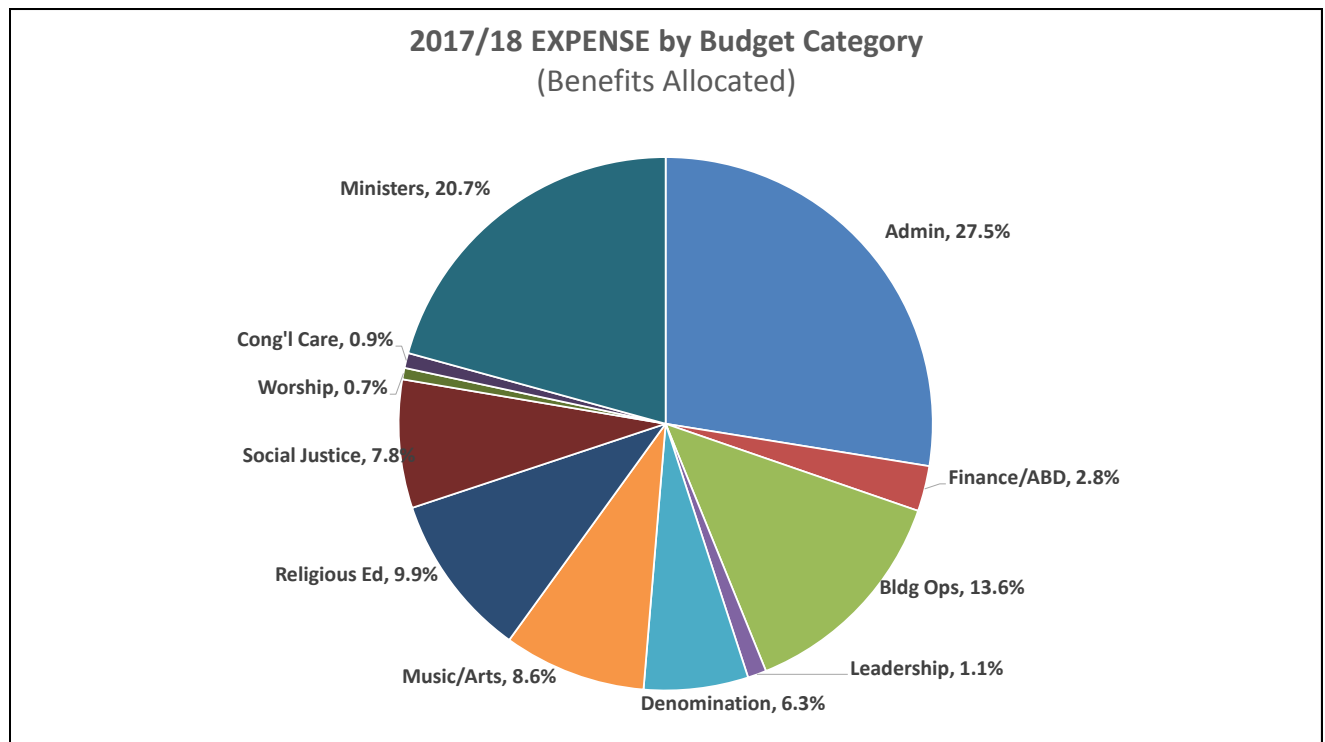
- From this chart, you can see that Pledges make up the largest part of our income. We are dependent upon ourselves to provide for our wonderful staff, building maintenance, and the like.
- A portion of Other Income is the pledge match which is closely related to pledge income.
- The other major contributors to income are the Income Endowment Draw and Building Usage (rentals).
- Social Justice income represents the generous contributions to our social justice commitments to the outside community for the Greater Good, Plate Collections and grants.
- Note: Further explanation on the next page.

TREASURER'S BUDGET SUMMARY CONTINUED

Operating Income			
	Projected 2016/17	Budget 2017/18	% Change
Pledges	\$694,431	\$730,410	5.2%
Building Usage	83,000	80,000	-3.6%
Fund-Raising	30,000	18,784	-37.4%
Income Endowment Draw	127,546	131,449	3.1%
Social Justice	74,593	80,000	7.2%
From Sharkey Fund	43,554	0	-100.0%
Other Income	222,890	107,050	-52.0%
Total	\$1,276,013	\$1,147,693	-10.1%

- Pledges reflect a positive Thrive canvass and are adjusted for expected defaults.
- Building Usage is budgeted conservatively as it depends on a variety of building rentals by non-profit groups and this has been a good year.
- Fund-Raising is budgeted conservatively and includes the Auction, Rummage Sale, Café Veritas and book sales.
- Income Endowment Draw is at 4.5%. Prior year was at 6%. Financial Advisory Committee recommended 4-4.5% as being sustainable; Board approved 4.5%. The church was the beneficiary of a significant bequest in 2016 which has allowed us to drop the percentage draw while increasing the dollar amount.
- Social Justice Income represents congregational generosity for the Greater Good, Plate Collections and grants from Social Investment Fund, Paul & Josephine Wenger Fund and the Gilbert Spirit Fund. An equal amount is included in expense and is sometimes referred to as the 'pass-through'.
- The Sharkey Fund was a bequest from a generous congregant. The congregation voted to use a part of it to fund additional ministers over the past three years. In Winter 2016, the part not used for budget was added to the Income Endowment.
- Other Income includes the Pledge Match, plate collections for our church and miscellaneous contributions. In 2016/17, this included the Fall 2016 pledge match, plate collections for the church, contributions to pay off Rev. Kaaren Anderson's negotiated severance, to fund some additional staffing as approved by the Board, and miscellaneous contributions.

TREASURER'S BUDGET SUMMARY CONTINUED



- The perspective of this chart is to match the categories on the summary income and expense in the Treasurer's Report.
- This chart has all the budget categories that you see in the table on the following page, except
 - Caring Community has been combined with Congregational Care.
 - Staff Personnel which is virtually all benefits has been allocated based on where each person is employed, e.g., if the employee works in Religious Education, his/her benefits are included in Religious Ed.
- Because of the significant Administration and Building Operations Expenses, this view doesn't tell you enough about how we match our money with our mission.

TREASURER'S BUDGET SUMMARY CONTINUED

Operating Expenses			
	Projected 2016/17	Budget 2017/18	% Change
Administration	\$230,148	\$235,613	2.4%
Building Operations	113,037	155,849	37.9%
Music & Arts	79,480	82,010	3.2%
Denomination	61,899	72,503	17.1%
Religious Education	90,607	93,581	3.3%
Finance/Canvass	29,217	31,578	8.1%
Social Justice	74,593	88,570	18.7%
Leadership/Governance	0	13,000	N/A
Caring Community	150	200	33.3%
Worship	4,240	7,620	79.7%
Congregational Care	2,800	9,626	243.8%
Ministers	396,549	196,735	-50.4%
Benefits / Personnel	158,093	160,808	1.7%
Total	\$1,240,812	\$1,147,693	-7.5%

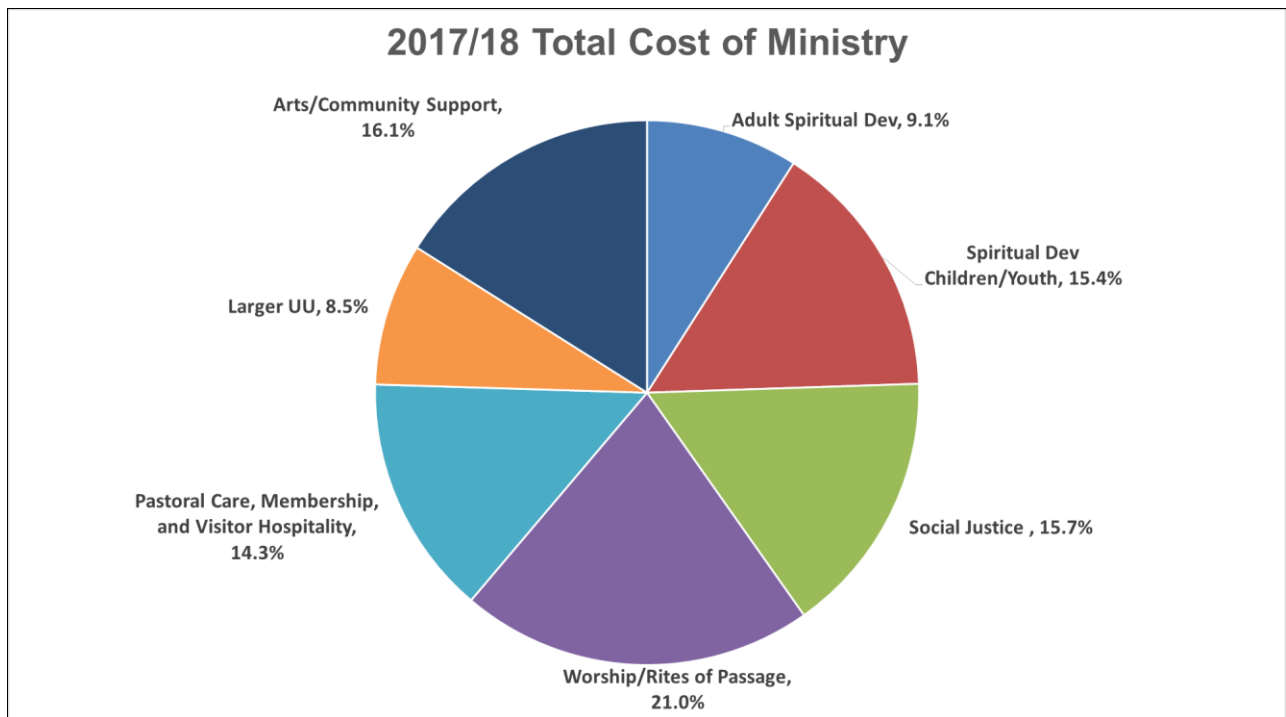
- The increase in Administration represents a 3% increase in employee salaries (office staff and sextons) and some reduced expense related to telephone and internet.
- Building Operations increase reflects funding the Property Maintenance & Improvement Fund according to the Bylaws (added ~ \$40,000), as well as landscaping support and evening security sweeps.
- Music & Arts increase is primarily the 3% staff pay increase and brings back a portion of expense that was reduced for the past few years which supports such things as sheet music and Music Sunday.
- Denomination increase brings us back up to full fair share for UUA National and Region. Our congregation has a long history of paying fair share. We both get services and support maintaining and expanding the UU movement nationwide.
- Religious Education is primarily the 3% staff increase and for Sheila Schuh who achieved her master's degree and full credential as a religious educator.
- Finance/Canvass – the biggest part of this is the church liability insurance in addition to expenses related to the annual budget drive.
- Social Justice includes the expense side of our generous community support through Greater Good, Plate Collections and grants. The increase in expense versus income is for a quarter-time coordinator.
- Leadership Governance provides for Unity Consulting on Policy Governance, a Racism Audit and Search expense.
- Caring Community is a relatively small amount to cover shortfalls related to memorial service receptions – nearly all are covered by the deceased's family.
- Worship increase includes some guest preachers and additional A/V coverage.
- Congregational Care increase is for a quarter time membership coordinator.
- Ministers budget includes Revs. Joel & Tina plus one month for Rev. Carlos. Last year this had 11 months for Carlos and all of Rev. Kaaren Anderson's negotiated severance.
- Benefits / Personnel includes FICA, health insurance, retirement, etc. Increase reflects changes in these areas.

TREASURER'S BUDGET SUMMARY CONTINUED

Senior Interim Minister 2017/18 Compensation		
	Projected 2016/17	Budget 2017/18
Senior Minister Salary	\$191,612	\$85,000
Professional Expenses	13,000	11,500
Housing Allowance	47,550	30,000
Total	\$252,162	\$126,500

- According to our by-laws the congregation votes on the salary of the called senior minister. This is also New York State law.
- With an interim senior minister, a separate vote is not required.
- The information is here to provide transparency and to keep us in the habit of looking at this each year.
- In 2016/17, we had Joel's compensation and Kaaren's severance. Also, the Professional Expenses included \$4,000 for moving expenses.
- Joel's compensation in 2017/18 brings his salary and housing back to the contractual amount that he had originally agreed to for 2016/17, but that he had reduced upon his arrival last summer. His professional expense is also brought back up to 10% of Salary + Housing.
- *Note: if you are new to this, the Tax Code permits ministers to elect to split their basic compensation between Salary and Housing. There is broad discretion regarding how this is done, but the Housing portion reasonably represents costs such as rent. In theory, this goes back to a time when most ministers lived in parsonages owned by the churches.*

TREASURER'S BUDGET SUMMARY CONTINUED



- The Total Cost of Ministry approach allocates all of our overhead (administration, building costs and the like) to the appropriate ministry, to the best of our ability to estimate it.
- Minister and other staff salaries/benefits are allocated to the areas where they spend their time. Thus, the senior minister has a large portion under worship and smaller portions for each of the program areas. If an intern is being supervised, then a portion of the senior minister's pay/benefits are allocated to Larger UU.
- While this is not 100% perfect . . . It is a pretty darn good portrayal.
- Arts and Community Support includes such things as Rental expenses, 12-step program support, First Muse, Café Veritas, the Art Gallery and the Church gardens.
- Larger UU includes support to the national and regional UUA as well as a small portion of the senior minister's time for supervising an intern in Canandaigua (for which we are compensated by the Canandaigua UU church).
- Social Justice includes the expense side of our congregation's generosity to the outside community for the Greater Good, Plate Collections and grants.

INDIVIDUAL MINISTRY REPORTS

RELIGIOUS EDUCATION

Ministry Leader: Sheila Schuh, Director of Religious Education

Ministry Mission Statement: We help young people listen, open, serve by providing learning experiences that include practical skills and service (promoting UU Principles), playful adventure, and counter-cultural wisdom (drawing on UU Sources)...so they can live mindfully and love faithfully.

Ministry Team Members: Staff- Jerry Ingram, Youth Coordinator; Dana Lundquist, Coming of Age and Junior Youth Ministry Director; Kristen Rogers, Director of Early Childhood; Jan Cook, Mindfulness Educator; Emma Kilmer, Workshop Leader/ Family Welcome Table; Shannan Foos, Childcare Provider, Marjorie Bovenzi, Religious Education Administrator; Corrina Vuillequez, Coming of Age Youth Assistant; **Volunteers-** Massey Williams and Cassie Coveney, Friends in Faith; Nearly all RE parents, Our Whole Lives Facilitators (Christine Farnum, Jule Sanchez, Jack Morrissey, Steven Buckley and Sarah Van Bortel, David Pinto, Wayne Holt, Timothy Via, Christine Davis); Youth Advisors (Tim Farnum, Gregory North, Katerina Gill), Ann Teese, Andrea Porter, Honduras Task Force, Greater Good Committee.

Highlights, Accomplishments and Challenges:

- RE registration: 228 with an average attendance of 117
- Based on Child Annual Meeting of 2016, integrated weekly UU history into children's worship
- Launched the children's UU Animal and Environmental Team in conjunction with the adult Climate Change Task Force, based on child interest.
- In addition to Parenting as Spiritual Practice running monthly, piloted UU Family Circle Training as well as one time offerings for parents focusing on concerns in the culture.
- Supported pilot of youth program model involving youth-lead program planning and leadership, nurturing youth group reformation year.
- Provided education related to First Unitarian's Black Lives Matter/ Youth Lives Matter including Black UUs in history, workshop on being an up-stander and ally, Non-Violent Communication, gun violence education, and family diversity.
- Continue to provide junior high youth with a variety of educational connections in community life through social justice partners (Gandhi Institute, Food Not Bombs, etc) and places of worship (Russian Orthodox, Quakers, Spiritus Christi, etc.)
- Updated all Our Whole Lives Sexuality Education resources for 6-9th grades, offered related adult education forum (Beyond the Binary) and new Pornography lesson for 9th, with parent integration at key ages.
- Increased positive sense of intergenerational worship for families, such as being included in Memory Tree ritual and Spring Equinox.
- Staff turnover is an ongoing issue due to the very part-time nature and pay of RE positions.
- Education for children with special needs requiring more than one to one support by teens, is more than we currently provide.
- Membership/visitor integration and canvassing of RE families need wider system support, especially in interim time when there is a natural dip in RE numbers.

Thank You's: All who have served so generously for our children and youth! Dana Lundquist for enthusiastic UU leadership, Steven and Sarah for years of OWL service, David Fires and Anne Perry for kitchen magic, Mitch Nellis our traveler sub, a highly dedicated youth advisor team, Revs. Joel and Tina for RE support, and Carol Anne and Marj behind the scenes.

INDIVIDUAL MINISTRY REPORTS CONTINUED

ADULT SPIRITUAL DEVELOPMENT

Ministry Leader: Rev. Tina Simson, Minister of Pastoral Care and Adult Spiritual Development

Ministry Mission Statement: We help people listen, open, serve by providing

- circles of learning, support and challenge
- opportunities for spiritual deepening and practice
- an intimate home in the larger church community

...so they become the people they want to be.

Ministry Team Members: This ministry depends on the volunteer efforts of over 70 individuals who facilitate Soul Matters, UU Wellspring, Journey Groups, Spiritual Practice Groups, Transition Groups, and Educational groups. Their commitment is an immeasurable gift to the congregation.

Highlights, Accomplishments and Challenges

- Established the First Unitarian Buddhist Fellowship with the help of leaders in our community who have Buddhist beliefs and facilitate our various Buddhist programs in the Adult Spiritual Development Ministry. This group in collaboration with Rev. Simson:
 - Created a page on our website for the Buddhist Fellowship
 - Supported a summer service led by our Buddhist Fellowship
- Number of Journey Groups: **37**, Spiritual Practice Groups: **10**, Transition Groups: **5**, Adult Education/Enrichment offerings: **6**
- Number of small group/adult education facilitators: **56**
- Total number of people involved in Journey Groups, Adult Education/Enrichment, Spiritual Practice Opportunities, and Support/Transition groups: **571**
- Soul Matters is a program that is over 10 years old at our church. Special attention needs to be paid to groups who have been together long term. Offering alternative formats or suggestions may help invigorate their time together.

Thank Yous: While it is impossible to thank everyone here, please know that if you facilitated or participated in a small group, a class, a spiritual practice group, you are a part of this ministry's success. Together, we've reached out to one another to offer caring, community, learning, and spiritual growth. A special thank you also goes out to: **All our volunteer program leaders; Tim Farnum** for generous hours of Tai Chi, **Jan Cook** for leading many meditation and spiritual practice offerings; **Joy Collins and Julie Brooks** for leading Courage and the Heart Broken Citizen, and **Libby Moore**, and **Shadia McAnally** for leading our **UU Wellspring programs**; and **every one of our facilitators** for their time, talent, and dedication.

INDIVIDUAL MINISTRY REPORTS CONTINUED

MEMBERSHIP

Ministry Leader: Rev. Carlos R. Martinez, Interim Assistant Minister

Ministry Mission Statement: We help people listen, open and serve by providing a pathway to membership and a connection for prospective members within the congregation.

Ministry Team Members: Volunteers: Dan Hollands, Mary Jones, Elaine Richane, Whitney Gegg-Harrison and Shannan Foos

Highlights, Accomplishments and Challenges:

- The membership team was formed in response to the identified need of creating engagement with prospective members by providing them a member as point of contact to serve as a point of connection to the congregation.
- UU 101: 42 sessions held, 113 attendees; avg. attendance per session: ≈ 3
- Starting Point: 4 Sessions held (10/5, 1/28, 3/11, 6/3); 50 attendees total; avg. attendance per session: ≈ 13
- New Members 2016-17: 31 new members
- Condensed the Starting Point course into one four-hour session. Involved ministry leaders in the Starting Point program experience in order to make immediate connections with attendees' interests.
- Restored UU101 which had been dormant since April 2016. Recruited and trained team members to conduct UU101 classes resulting in 31 new church members.
- Invited team members to attend Starting Point sessions to ensure that they understood the next step in the membership process.
- Looking forward: the membership activity can only be made sustainable through the active participation of volunteers with the assistance of a dedicated membership coordinator.
- To ensure the consistency of follow-up after paid interim minister leaves will require the participation of a paid part-time Membership Coordinator.
- Need to review the usefulness of UU201. Now that Starting Point is more fully focused on making connections with ministry leaders, and interest forms are completed, perhaps it is only useful for "the ask" (pledging). Possibly this can be done in Starting Point or via phone follow-ups.
- Consideration needs to be given to the By-Law requirements for membership. Currently, in the absence of "called ministers," two board members must witness the signing of the membership book.

Thank Yous: Thank you to all of you who have volunteered to breathe new life into the membership effort. A special thank you to Anne Perry for preparing yummy dessert items for New Member Recognition Weekend, and to the Board members for showing up in strength to welcome new members. A special thanks to John Solberg for the wonderful new member photo which graces the bulletin board.

INDIVIDUAL MINISTRY REPORTS CONTINUED

PASTORAL CARE

Ministry Leader: Rev. Tina Simson, Minister of Pastoral Care and Adult Spiritual Development

Ministry Mission Statement: We help people listen, open, and serve by providing...

- Continuing compassionate presence
- Ongoing community connection
- Relationships of support
- An opportunity to experience the giving of pastoral care as a spiritual practice
So the giver and the receiver experience grace in the full spectrum of life

Ministry Team Members:

- **Caring Community Team**
Patti Clark - Caring Cuisine; Linda Hazel, Ellie Stauffer - Memorial Service Receptions
- **Pastoral Care Team**
Ellie Stauffer, Sue Ames, Sue Steepy, Louise Paulsen, Penny Quill, Joyce Henzel and Jenny Gough.
- **Dealing with Grief Support Group**
Rev. Libby Moore and Rev. Lynn Acquafondata
- **Caring Connection Group Support**
Soul Matters groups who participated in the Caring Connection included groups run by Gail Wilder, Sue Steepy, Tina Simson, Andrea Porter & Marcia Blacklin, Jim Blake, John Dancy, Libby Moore, Mary Hammele, and Deborah White

Highlights, Accomplishments and Challenges:

- 92 individuals in need of Pastoral Care from July 2016-May 2017 have received support from the Minister of Pastoral Care, and the Pastoral Care Team. All members who requested visits received one.
- Six individuals/ families received a total of 48 meals from the Caring Connection-Soul Matters Group this year during a time of need 2016-17. All individuals who requested meals received them.
- Eight memorial services for members, non-members and family members of church members were conducted from 2016-17
- **We are a diverse group with diverse needs** that encompass not only on our elder population, but also our families, empty nesters, singles and caregivers. Providing UU focused support to these diverse needs will take service and programming that is responsive and flexible.

Thank You: This ministry depends on the dedication and compassion of many seen and unseen individuals. It is with the deepest gratitude that we recognize all those who care and offer support. I especially want to thank the Soul Matters Facilitators who volunteered this year to support our Caring Connection program, Patti Clark for her devotion to getting meals to those in need and Ellie Stauffer and Linda Hazel who are tireless in hosting the memorial receptions. My sincere appreciation to the members of the Pastoral Care Team who open their hearts every day to members in need; you are all a gift to this community.

INDIVIDUAL MINISTRY REPORTS CONTINUED

SOCIAL JUSTICE

Ministry Lead: Rev. Carlos R. Martinez, Interim Assistant Minister

Ministry Mission Statement: We help people listen, open and serve by organizing congregationally affirmed, collective acts of social service and social change that transform the world in the direction of justice

TASK FORCES

Black Lives Matter/Youth Lives Matter: Len Stein, chair

Highlights, Accomplishments and Challenges:

- We currently have 23 people who have listed themselves as task force members.
- We actively promoted “Raise the Age” legislation ourselves and in collaborations with the ROC/ACTS Criminal Justice Task Force. This involved three petition signing tables as well as a presentation by Center for Community Alternatives from Syracuse.
- We also set up and attended a meeting with NYS Senator Robach; Sen. Funke refused to see us. We gathered at Sen. Funke’s office with many cards and letters from his constituents and were covered by the press. SUCCESS: Raise the Age legislation passed and is being implemented. We have started working on HALTING excess solitary confinement.
- We shifted energy to dealing with racism, and held two book discussions on Debby Irving’s “Waking Up White,” each attracting about 30 people.
- Challenges include that dealing with Racism and Mass Incarceration are very broad topics, making it difficult to focus in on an area we all agree to work on.
- We anticipate working with the Senior Minister and Social Justice Executive members on racial justice programs in the fall, and appreciate the wider attention being given this work.

Thank You: We are grateful to a number of people who were very helpful to the successful functioning of the Task Force. Among these are Jon Greenbaum, of Roc/ACTS as well as John Keevert, Roberta Buckle, and Tom Perry from the Social Justice Council Executive Committee.

Honduras Partnership: Barbara Gawinski, chair

Volunteers: Bob Ames, Jenny Cos, Judy Fuller, Vicki O’Brien, Robin Suwijn, Paul Suwijn, Carol Thiel, Moritz Wagner, Ed Wiltse, Penny Townsend, SJC appointee to HTF, many who donated scholarships, many who electronically engaged participants on the distribution list, and the many who donated supplies to Honduras Task Force collections.

Highlights, Accomplishments and Challenges:

- In the fall of 2016, under the direction of Sheila Schuh and Robin Suwijn, RE classes were conducted on a “healing home” as cultural exchange program between RE students and students in Honduras classrooms.
- On October 2016 trip, Carol Thiel and Kathy Lewis (Friend of First Unitarian Church) delivered school supplies, collected applications for scholarships in 2017, collect scholarship students materials who wanted to reapply for scholarships in 2017, and

INDIVIDUAL MINISTRY REPORTS CONTINUED

delivered the “healing home” curriculum for the students in various mountainous school districts. Following the fall trip, Carol Thiel and Kathy Lewis presented a program to congregants on their travel experiences. Carol Thiel and task force members posted an art exhibit in the Williams Gallery from the Honduran children in exchange with the RE students of our congregation.

- We have hired Roney Amaya, teacher who visited First Unitarian in 2015, for Saturday tutoring of scholarship students in 2017, allowing the former tutor, Antonia Garcia Cabrera, to attend weekend university. Roney Amaya agreed to continue as liaison person with our church and Honduras students, and Ma Celia Gomez continues to serve as paid community liaison to the parents of scholarship students assisting them in securing housing for their students.
- Scholarships: We have reached our 100th scholar to be supported by First U scholarship donations. We have welcomed a few new private donors to support scholars from 8th through university level. There are 29 scholarship students this year. Greater Good donations were used for new 7th grade students. In collaboration with former Honduran colleagues Lowell Tatum and Roney Amaya, in February, and Barbara Gawinski, in May, twenty-nine students in grades seven through University received a total of \$ 10,583 in 2017.
- Barbara Gawinski represented this Task Force on the May trip with the DFM. She presented a curriculum to the teachers of 10 school district /towns, thanks to Jenny Cos, Robin Suwijn, Bob Ames, Carol Thiel, Vicki O'Brien and the generous financial and school supply donations of this church's members, HFM, and BG's Jazzercise Studio of East Rochester. Thirty-five teachers attended the 3.5 hour seminar/workshop.
- Portillon, community in Honduras, completed a new enclosed Kindergarten classroom and have completed three enclosed classrooms for middle school. Thanks to First U generation donations over three years to help them support their first three years of middle school.

Thank You: The Honduras task forces expresses deep gratitude to those who have helped support the ministry of the task force through RE curriculum development and classroom teaching, creating and conducting the art displays, the financial contribution for scholarship students and supplies to the schools, active curriculum development for the teach the teacher curriculum, the travelers to Honduras who deliver these programs, and those who support comes through prayers for the safe journey of our team with the Department of Family Medicine who provide this rich partnership.

Micro-Finance and Community Development: Terry Goldstein, chair

Volunteers: Paul Minor, Paul Suwijn, Robin Fisher, Fritz Lange, and Bruce Volbeda.

Highlights, Accomplishments and Challenges:

- Met with and formed a relationship with George Gotcik and George H.Moses, Executive Director of the Northeast Area Development (NEAD), to assist in their mission to lead quality of life enhancement activities through community, neighborhood and business development, housing enhancements and development, and to plan and assist in educational, cultural, recreational and social.
- With mentoring support of longtime client Charles Switzer of Macabee Republic, a graphic arts business saw expansion of its storefront and taken on a partner with sales growth and diversification .

INDIVIDUAL MINISTRY REPORTS CONTINUED

- Continued building our relationship with Rochester Refugee Resettlement Services with their International Bazaar Project, and we participated in meetings with Nazareth College, School of Management to discuss our experience with small business mentoring.
- A longtime client, Paula's Essentials participated in the Benefits Boutique at Church during the Holidays. Currently working with a very promising new client, Conyers Collection, in establishing a business designing and selling a collection of affordable, stylish hospital scrubs. This project could lead to a sewing training program and jobs within the refugee community.
- Sustaining community relationships remains a challenge; for example, we lost a close tie with the Executive Director of the Rochester Urban League when she retired and are having difficulty re-establishing with new Director. Challenges also include reaching appropriate clients. We have discovered many of our prospects do not have some necessary skill sets needed to start and succeed in operating their own business. This is not unique to our task force. We expected our financial partner Credit Union would be referring clients on a regular basis, but this has not been the case. Also outreach for volunteers among our Congregation has not yielded much success. We do have a small core of volunteers who have worked with the MFTF over the last 4-5 years, but feel opportunities for outreach are limited.

Thank you: We are extremely grateful to the congregation for the 2012 Greater Good award that made it possible for the Micro-Finance Task Force to come into existence! We also greatly appreciate the support of the ministry and especially the Social Justice Council for all of their support over the last 5 years.

Environmental Climate: John Keevert, chair

Volunteers: Susan and John Steepy, Keith Able, Wayne Holt, Ken Buckle, Ron Johnson, Andrea Porter, and Art Rothfuss.

Highlights, Accomplishments and Challenges:

- **Activity Report:** We have shown six climate-related videos that were open to the congregation and the community. We have also shown a video to two RE groups. We have done tabling five times to help people calculate their carbon footprint, so they know where to focus their efforts. We have had presentations by groups promoting both individual solar panel installations, as well as community solar. We have had four letter writing tables on a variety of climate related issues. We collaborated with Rochester Pachamama Alliance, presenting a program that attracted over 300 people to church on January 20th 2017. We have had live presentations on regionally appropriate garden plants, threats to bees, and the Life of Rachel Carson. We have instituted weekly tips on green lifestyle in the weekly newsletter.
- Our environmental book discussions on *AFTERBURN- Society Beyond Fossil Fuels*, and *ACTIVE HOPE: How to Face the Mess We're in without Going Crazy* were attended by a combined 31 church and community members.
- We welcomed Sheila Shuh to our meetings and worked with her to support the (K-5) UU Environmental and Animal Team.
- The recent blackboard in the lobby was a result of that collaboration. That got 214 responses, but some of our other programs didn't get the level of support we hoped.

INDIVIDUAL MINISTRY REPORTS CONTINUED

Thank you: To all our volunteers and the congregation for supporting our effort to raise awareness and concern for Environmental Climate issues.

ONGOING PROJECTS

Rochester Area Interfaith Hospitality Network (RAIHN)

Coordinators: Cathy Cheplowitz, Jerry Cheplowitz, Janice Hargrave, Dave Teegarden

Highlights, Accomplishments and Challenges:

- Hosted 26 families, 80 individuals, in 6, week-long rotations. Added The Church of Latter Day Saints as a support congregation (in addition to the existing support of Temple Beth El)
- Raised funds (\$266.00) for First Unitarian RAIHN by hosting the reception for a First Muse performance
- Received a thoughtful, altruistic grant (\$1000.00) from the Micro Finance Task Force toward the purchase of new, durable mattresses for our guests.
- Held a Volunteer Appreciation Reception after each of the three services as a “thank you” to our dedicated volunteers and prospective volunteers
- Participated in the Volunteer Fair organized by the Social Justice Council
- As a RAIHN team we plan to continue the valuable work of hosting families in transition. We hope to continue our partnerships and grow our volunteer base with the collaboration of our two support congregations. In time, we would like to replace all guest air mattresses with durable, long lasting foam core beds. It is our hope that we can maintain a sustainable RAIHN budget through plate collections, donation gifts and fund-raising opportunities.

Thank you: We were buoyed by the support of over 100 volunteers who generously gave their time during each hosting rotation. Also, we would like to extend our sincerest gratitude to all of those who support our program including, Rev. Joel, Rev. Carlos, Rev. Tina, Sheila, Will, David, John and our wonderful volunteers. This program would not be possible without the tender loving care and attention to detail of our beloved Carol Anne! With her, all things are possible!

UU/Schools Partnership (UUSP)

Andrea Porter, Co-chair, Joe Simson, Co-chair, Dan Hollands, Treasurer, Ann Bayley, Cass Doyle, Scott Roth, Barb Gorski, Linda Hazel, Whitney Gegg-Harrison

Highlights, Accomplishments and Challenges:

- **Activity Summary:** We have a total of 67 volunteers (38 of whom are church members; approximately 14 new volunteers). HOSTS (Help One Student to Succeed): Reading instruction with 7-12 2nd grade students, one on one, three times a week for one hour. Many volunteers came an hour early to read with kindergartners in our new Partner “Pears.” Classroom Aid: aid to teachers in the classrooms, both one on one and group instruction in reading, writing, math and science. Extended Day Activities: Reading Club, 4H Club, Science activities, knitting club, music activities. Support of Special Events: Volunteer and financial support for Christmas Store, Parent Breakfasts, Black Lives Matter event, Open House, cultural Expos, school wide Thanksgiving and other activities. Collected Children’s Supplies: Delivered underwear and socks collected from the congregation on “Sock it to Me Saturday” and “Undie Sunday,” along with school clothes, supplies and books delivered

INDIVIDUAL MINISTRY REPORTS CONTINUED

throughout the year. Special training: Asthma instruction for students and their parents. Uknitarians: Scarves and mittens for kids. Backpack: participated in program to pay for and deliver food for weekends to 39 students at School 22.

- **Treasurer's Summary:** Teacher Financial Support: At School #22, \$50 per teacher for school supplies for a possible total of \$800 and at School #15, \$100 per family team for a possible total of \$600. Field Trip Support: Paid for buses for student field trips for educational purposes for an approximate total of \$3000. Total amount of Money raised: \$4231 from bagel sales, Benefits Boutique, plate collection and First Muse Concert.
- **Challenges** include the loss of a paid coordinator to facilitate the recruitment, assignment and training of volunteers.

Thank you: To all the awesome volunteers who spend their time and energy teaching, developing curriculum and loving the kids at Schools #22 and #15.

Rochester Alliance of Communities Transforming Society, Inc. (ROC/ACTS)

Tom Perry (Board Rep.), Penny Townsend-Quill (Alternate Board Rep, Sacred Conversations)

Highlights, Accomplishments and Challenges:

- **Activity Report:** Our church joined Roc/ACTS in October 2016; nearly 50 people attended the January meeting; 35 returned interest cards. Child Care Funding Campaign – participated in lobbying the county legislature in December and won increased funding in 2017 budget. With 75% of children eligible for child care subsidies in Monroe County still not receiving them, this campaign will continue in the next budget cycle. Rochester Sanctuary City Campaign – participated in demonstrations and lobbying City Council; resolution reaffirming Rochester's sanctuary city status passed in February. This campaign will continue as the Secure and Just Communities Alliance in support of sanctuary policies in the towns and villages of Monroe County's Raise the Age Campaign – our BLM/YLM Task Force and other church members signed post cards, called and met with local state senators, and went to Albany to lobby; the measure passed and was signed into law in April. Police Accountability Campaign – the Roc/ACTS Criminal Justice Task Force and our BLM/YLM Task Force have pivoted together to build a movement for an independent police accountability board and make this a major issue in the city council and mayoral election campaigns.
- **Sacred Conversations:** Members of Baber AME and First Unitarian came together in April and May to hear each other's stories, explore how we've internalized the messages of the dominant society, and strengthen our ability to identify how the system continues to create racial disparities.
- **Challenges** include the need for ongoing funding to cover the full annual participation fee in 2018 and cost of leadership training in November 2017 is still to be resolved. The Roc/ACTS organizational model calls for building a Core Team. Church member participation has been aligned with specific issues, not with the building Roc/ACTS. Viability of Roc/ACTS to address the needs of a large congregation such as First Unitarian still being explored. Ministerial oversight to liaise with Roc/ACTS clergy given Rev Carlos' departure still to be resolved.

Thank you: Thanks to Rev. Joel for supporting joining Roc/ACTS during an interim year, Rev. Carlos for work with Clergy Caucus and Sacred Conversations, the Black Lives Matter/Youth Lives

INDIVIDUAL MINISTRY REPORTS CONTINUED

Matter task force for support of Raise the Age in our congregation and in the community. Thanks to everyone for their enthusiastic and heartfelt support in launching Roc/ACTS at First Unitarian.

Unitarian Universalist Service Committee

Jack Maniloff, volunteer coordinator

Highlights, Accomplishments and Challenges:

- Plate collection for UUSC Haiti Hurricane Relief (November 12/13, 2016). Collected: \$1,280
- UUSC *Guest At Your Table* program in Religious Education classes and plate collection during services (March 11/12, 2017)
- Interfaith program with Temple Beth El (April 19, 2017) as part of their Holocaust Remembrance Day (Yom HaShoah) Observance: screening of *Defying the Nazis: The Sharp's War*, followed by a panel discussion on local efforts to help refugees with Bonnie Abrams, Director of the Jewish Federation Center for Holocaust Awareness and Information (CHAI); Warren Heilbrunner, Holocaust Survivor; Jack Maniloff, UUSC; and Michael Miller, Temple Beth El Resettlement Committee. Attendance: ~130
- Interfaith program with Temple B'rith Kodesh (April 28, 2017) as part of their Holocaust Remembrance Day (Yom HaShoah) Observance: a Shabbat Service, followed by a screening of *Defying the Nazis: The Sharp's War* and comments by Jack Maniloff. Attendance: ~150
- **Challenges include** how to educate First Unitarian members and friends about our UUSC legacy, and how they can learn about and support ongoing UUSC programs.

Thank you: Many thanks to Rev. Carlos Martinez for arranging the interfaith programs with Temple Beth El and Temple B'rith Kodesh, and to Sheila Schuh for arranging the UUSC *Guest At Your Table* program in our Religious Education classes.

Connect and Breathe

Connect & Breathe is an ongoing project of First Unitarian. It is a non-judgmental talk line for people who have experienced abortion and need to talk to someone. Two of our church leadership are on the Board, Stephanie Ketterl, Co-Chair, and Laura Humphrey. An abortion provider recently joined the Board. There are 30 active volunteers, six of whom came out of this year's in-depth volunteer training. The volunteers also gather for quarterly de-briefing sessions with a facilitator to process their experiences taking call. One of the volunteers is quadriplegic for whom unique phone arrangements have been made. She appreciates having de-briefing sessions at the church which is accessible. Special thanks to all of the First Unitarian chocoholics who have made C&B one of the top distributors for Equal Exchange products, and who help pay the rent on the C&B office.

INDIVIDUAL MINISTRY REPORTS CONTINUED

MUSIC AND ARTS

Ministry Leader: Thom Snell, Music Director

Ministry Mission Statement:

We help people listen, open, serve by providing people with joyful, practical and daring worship that reminds people who they most want to be and rekindles their passion for life.

Ministry Team Members:

Zachary Zwahlen, organ; Melissa Boyack, band leader; Orange Sky (Mike Boyack, Lauren Faggiano, Mark Farnum, Jimmy Grillo, Mike Mullane, Justin Passamonte, Ali Putney, Joshua Rose, M'Lou Speranza, Jonathan Stills, Cindy Tag, Erika Vasquez, Kyle Williams, with guest appearances by many members of our Youth Group); Chris Lim, AV Technician; the First Unitarian Choir; Jackie Lange and the Café Veritas team; Melissa Matson and the First Muse team; Sandy Hollands and FirstLight Players; Irene Burnet and the Williams Gallery Art Committee; Jeananne Thomas and the Ed Schell Crescendo Fund Committee

Highlights, Accomplishments and Challenges:

- The Choir offered a diverse range of music throughout the year, including at the December Music Sunday services celebrating winter holidays of light, Christmas Eve, Equinox, Easter, and at June Music Sunday.
- Orange Sky rocked out every week at our Saturday Service, a December Music Saturday service, and on Christmas Eve.
- Café Veritas brought hundreds of people into our walls to experience excellent folk music.
- First Muse offered three concerts of chamber music to great accolades.
- FirstLight Players helped us worship through four dramatic arts presentations during worship services this year.
- The Williams Gallery inspired us with exhibitions of watercolor, oil, acrylic, and sculpture.
- The Ed Schell Crescendo Fund Committee sponsored a recital featuring professional dancers accompanied by Zachary Zwahlen on the organ.
- The lowered budget left no money for new sheet music, instruments, or guest musicians, but we still had a wonderful year of art and music through the generous gifts and talents of our members.

Thank You's: Thank you to all of the dedicated people who make magic happen in our worship services and in our building week after week. Thanks to Melissa Boyack for her leadership and endless creativity. Thanks to Rich Wilder for the gift of his compositional talents and for keeping the Choir connected and informed through maintaining the email list. Thanks to Lynn Kinsman for her tireless efforts as the Choir Librarian. Thanks to Carol Anne for her gift of finding space for all of our ministries to thrive within the limitations of our building. Special thanks to Zachary Zwahlen for his dedication, flexibility, and unparalleled musicianship.

INDIVIDUAL MINISTRY REPORTS CONTINUED

OFFICE ADMINISTRATION

Ministry Leader: Carol Anne Cleary, Office Administrator

Ministry Mission Statement: We help people listen, open and serve by...ensuring mission-based use of our building, connecting church members, staff, and the outside community with information, and providing church leaders with tools.

Paid staff and volunteers: **Paid Staff:** William Hayes, John Grego, and David Chamberlain (Sextons), Laurie Collins and Heather Olson (Evening Administrative Assistants). **Volunteers:** Patti Clark, Roberta Buckle, Jo Cone, Ronna Abbott and Irene Burnet.

Highlights of 2016-17:

- Added an Information Desk near the Lobby for more visible presence to all who enter the building.
- Redesigned the church website, which includes an Events Calendar.
- Scheduled meeting/event space for all First Unitarian Church ministries and outreach: Social Justice, Religious Education, Membership and Hospitality, Music and Arts, Worship, Pastoral Care, Adult Spiritual Development, all church task forces, ongoing projects, committees, tour groups, weddings, memorials, fundraisers, and all other church/church sponsored events.
- Surpassed the 2016-17 Building Usage revenue goal by approximately \$10,000.00. This includes:
 - Maintained successful ongoing relationships with our two largest long-term renters: Winton Road Nursery School, and Eastman Community Music School's New Horizon programs, in addition to our ongoing regular meetings by many local organizations, including Rochester N.O.W., Compassionate Friends of Rochester, Citizens Climate Lobby, Alcoholics Anonymous, Metro Justice, League of Women Voters, U of R Palliative Care Unit, Gandhi Institute, Pachamama Alliance, and many, many more.
 - Added two additional long-term rentals: BOCES English as a Second Language weekly classes (year round), and The Foundation for Practical Philosophy's weekly classes (30 weeks per year). Also enabled several local, grass roots organizations to have meeting/event space for little or no cost, including ROC/Acts, Stronger Together Western NY, Action Together Rochester, and several subgroups thereof: Women's Caucus, LGBTQ, Immigration, and Health Care.
- This summer we welcome back Girls Rock! Rochester for the 3rd consecutive year. This is a wonderful organization whose mission is to use music creation and performance as tools for cultivating self-confidence in girls and trans youth.
- Challenges include a small and often over-extended staff which is not commensurate with the amount of activity in the church. We also need to build our volunteer base, to cover the Information desk when there is illness and/or travel.

Thank you: It takes a village! I am extremely grateful to the amazing staff and volunteers I have the honor to work with, who contribute in countless ways to the daily operations and mission of our church. I am also thankful to the many supportive church members in our community, and for the ongoing relationships I have the honor of building within the greater Rochester Community.

INDIVIDUAL MINISTRY REPORTS CONTINUED

HOSPITALITY

Ministry Leader: Rev. Carlos R. Martinez, Interim Assistant Minister

Ministry Mission Statement: We help people listen, open and serve by being the friendly, welcoming face of the congregation.

Ministry Team Members: Coordinators: Fritz Lange, Penny Townsend-Quill, & Lynette Blake.
Volunteers: Barbara de Leeuw, Barbara Gorski, Carolyn & John Dancy, Cathy Reda-Cheplowitz, Dave Burnet, Deborah Cooper Roberts, Dick Fitts, Edward Golem, Elaine Richane, Eleanor Stauffer, Libby Moore, Emily Osgood, Ernesto Michelucci, Fritz Lange, Gaelen McCormick, Jan Miller, Jerry Cheplowitz, Jill Pavone, Jo Cone, John Farrell, Joyce Henzel, Jule Sanchez, Karen Evans, Kimberly Prinsen, Lea Mancarella, Lyn Kelly, Lynette Blake, Mary Jones, Mary Palmer, Patti & Dave Neumann, Penny Townsend-Quill, and Ruth Myers.

Highlights, Accomplishments and Challenges:

- Volunteer Fair: 11 volunteers sign-up for Hospitality Team
- Training: Nine team members attended the November 12th Hospitality Training
- From December '16 to May '17 there were 177 Hospitality Team signups for all services.
- Organized a smoothly functioning volunteer hospitality team for all three services. Volunteers trained cross functional hospitality roles: greeter, welcome table and usher.
- Welcome area streamlined and in new location. Added a new table to Welcome area.
- Strong sense of mission and esprit d'corps among team members.
- SignUpGenius continues to be the preferred platform for organizing team participation.
- Updated and refreshed bulletin board signage and photos.
- Literature rack replenished with combination of UUA and First Unitarian literature.
- Visitors report feeling warmly welcomed!
- Some gaps in Hospitality coverage are experienced from time to time.
- Next phase of training in First Aid, CPR and Emergency Procedures deferred to a future period so as not to overwhelm volunteers with too many duties and responsibilities.

Thank Yous: Thank you to all the Hospitality Team members for making First Unitarian a warm and welcoming place.

INDIVIDUAL MINISTRY REPORTS CONTINUED

MINISTERIAL INTERN SUPERVISION

Ministerial Intern Supervision: Interim Senior Minister Rev. Joel Miller supervised Interim Intern Minister Rita Capezzi (serving at Unitarian Universalist of Canandaigua).

Ministry Mission Statement: We help people listen, open and serve by....

- Supporting the interim intern as she does interim work with former congregational partner UU Church of Canandaigua
 - Weekly meetings
 - Ongoing phone calls and emails as necessary
 - Facilitating ministerial covenants
- Providing the interim intern learning experiences obtainable through interactions with senior staff at weekly meetings
- Providing leadership and modeling
 - Assisting with preparation for monthly board meetings with Board President
 - Assisting with preparation for monthly board meetings with interim intern
 - Attendance at monthly board meetings and de-brief with the interim intern
 - Facilitating consultations with District Staff

Highlights, Accomplishments and Challenges:

- Soothed anxieties following departure of ministers
- Facilitated termination of official partnership between UU Church of Canandaigua and First Unitarian at request of Canandaigua
- Provided and facilitated stabilizing leadership for worship and pastoral care through supervision of interim intern
- Facilitated seminary project to benefit Canandaigua
- 10 new members since September
- Challenges include: Developing strong relationship between Canandaigua and District Staff, and facilitating process for determining future ministry and financial feasibility

Thank yous: Thank you to the Senior staff at First Unitarian: Rev. Joel Miller, Rev. Tina Simson, Sheila Shuh, Thom Snell, Carol Anne Cleary, and Rev. Carlos Martinez; and to the Trustees of UU Church of Canandaigua: Dorothy Hoskins, Pat Mehls, Nancy Reed, Joan Berends, Socby Beer, Meghan Cabral, and Thomas Lyon.



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