

**ANNUAL REPORT 2022**

**FIRST UNITARIAN UNIVERSALIST SOCIETY OF SYRACUSE**



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**ANNUAL CONGREGATIONAL MEETING**  
**JUNE 5 2022, IMMEDIATELY AFTER SUNDAY SERVICE**

**JUSTICE WITH LOVE AND JOY, OPEN TO AWE!**

# **ANNUAL REPORT AND ANNUAL MEETING INFORMATION 2022**

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**MEETING AGENDA**  
**Sunday June 5, 2022**

1. Chalice Lighting
2. Selection of a Moderator
3. Receipt of Reports, including Nominating Committee
4. Election of Board, Officers, and Nominating Committee (included in Annual Report)
5. Approval of Budget for FY 2022-2023 (included in Annual Report)
6. Approval of 8th Principle  
**Resolution: To accept the 8th principle “journeying toward spiritual wholeness by working to build a diverse multicultural Beloved Community by our actions that accountably dismantle racism and other oppressions in ourselves and our institutions.”**
7. Chalice Extinguishment

## Annual Congregational Meeting Minutes

Saturday, June 6, 2021

Meeting called to order

1:04 PM

Quorum verified

at **36** voting members

Chalice Lighting

Rev. Jennifer

Motion: Nomination of moderator

Nominated: Coran Klaver

**Motion:** Paul Barfoot

**All in favor:** all present

**Opposed:** 0

The motion passes.

Receipt of reports

Heidi Hart-Gorman

Reports were emailed to all members. Any comments on the reports received?

No comments. The moderator receives the committee reports for this year.

Special thanks

**Special thanks to Karen Bowman for assembling our committee and staff reports for this year.**

**A special acknowledgement in memory of Valoree Suttmore for her many contributions to this congregation including to organizing and updating our documentation and policies.**

**Board President: Many thanks to our staff members and the many volunteers who have kept things running during this extraordinarily**

**difficult year.** We are poised to have an exciting, transitional year next year and are working very hard to keep our community going in a safe, inclusive way. The Finance Team worked very hard on our budget which I'm proud to be presenting for a vote today.

**Thanks to the Worship Committee for their determination and flexibility in putting together services for this year.**

Proposed slate of officers (Nominating Committee)

**President:** Heidi Hart-Gorman (2nd term)

**Vice President:** Devon Kinsman (1st term)

**Treasurer:** Jim D'Aloisio (5th term)

**Trustees:** Kelly Eagan-Ledyard (2024), Pamela Spearman (2022), Sue Wadley (2023)

**Clerk:** Heather Highfield (4th term)

**Financial Secretary: Unfilled**

**Nominating committee new members:** Michael Messina-Yauchzy (2024), Don Marr (2024)

Vote to approve slate of officers (by Zoom poll)

**All in favor:** 100% (all present)

**Opposed:** 0%

Approval of budget for FY 2021-2022

Discussion

- (from Jim D'Aloisio) I'm very happy with this budget. We are actually pledging more this year than last year despite the difficulties of this year. We restored Rev. Jennifer to  $\frac{3}{4}$  time. Hopefully folks can read the budget - it's got some useful commentary. We were able to include modest cost of living increases for our staff. This budget represents a significant draw from our investments. We recognize this is an investment from the future, but I should acknowledge that we've never taken this much from our endowment before.

- Montessori, our major tenant, will be renting more space from us next year, so our rental income from them has increased. This will be a big help.
- We were able to return some funding to the continuing education budgets for staff, though we are not yet back up to the UUA recommended amounts after last year's tighter budget.
- We are maintaining our Fair Share dues to the UUA. What does that mean? We pay a percentage of our budget to support the UUA - a pledge from our congregation to the denomination. We believe that amount is worth every penny and more. Our staff and Board have a huge amount of support through the UUA. We have regional staff who are available to offer us resources, training, advice and other support. Our All Ages services content is largely provided by the UUA, who have already dealt with all copyright issues and organized materials. The music we use for services has also been made available on the UUA website and permissions have been worked out ahead of time for UU congregations.
- Confirming that we do not have to pay back the PPP loan for approx. \$27,000 that we received. We used the money for approved costs, successfully applied for and were granted forgiveness, so it functions as a grant.
- It appears that we are paying off a line of credit while dipping into our investments?  
 Response: Partly we are putting a payback amount on paper - we could reduce the amount we take from our investments and wipe out that payment, but it's good business to show it in the budget regardless.  
 The bottom line on the budget, ~\$74,000 has to come from investments because we don't have enough to cover expenses. In the expenses, we have \$12,500 marked down as a payment to our line of credit, and we could subtract this from the \$74,000 but it's better to show it being accounted for in the budget. Figuratively, we're essentially taking from our savings account to pay off a loan.

Vote to approve 2021-2022 budget

**Motion:** Susan Wadley

**Second:** Susan King

**All in favor:** 96%

**Opposed:** 0%

**Abstentions:** 4%

**MOTION:** Capital expenditure

To approve the expenditure of up to \$6,000 (in addition to our NYSCU grant) to enhance multi-platform worship as a special capital expenditure, with the recommendation that the Finance team pull this money from the Wallace Chadwick fund.

**Motion:** Jim D'Aloisio

**Second:** Devon Kinsman

Discussion:

- It will cost money to set up systems to allow us to have hybrid services (in-person and remote simultaneously). We will need to upgrade existing and acquire new hardware and software. We did receive some grant money from NYSCU for this but will need to approve a potential additional expenditure to cover anything else we may need above the amount of the grant. The Board proposes this motion as a standalone capital expenditure. The Board also proposes pulling those potential expenditures from our Wallace Chadwick fund, which is an investment fund created by the Wallace and Chadwick families. The money is earmarked for facilities related capital projects.
- Balancing our budget for next year will require about \$4,000 from the Wallace Chadwick fund, which is only about \$20,000. Drawing more from this fund would not be sustainable. The motion is worded this way but does allow for us drawing from these funds and reimbursing them from other sources later.
- Average attendance in our church is approx 40-50 people. If we did hybrid worship, how much would it reduce the physical attendance at

church? Would it mean unnecessary expenditures to keep the building heated etc. for a reduced number of people? Response: If we have 40 people in the building and 20 people online, we have an attendance of 60 - we will be counting attendance as equally important from both platforms.

- Once we have the technology, who will be responsible for setting it up each week, run it during the service, and possibly take down any needed hardware and put it in a secure place?

Response: The analogy of building a plane while we're in midair has been used about this pandemic and that is honestly what we are doing making our plan to come back. All numbers are educated estimates, but we do not yet have a specific list of technology. We don't know exactly who will run this equipment. Staff will be busy running services, so this will need to be run by volunteers, and we will need to identify those volunteers as we go. We do intend to keep the equipment safe but we do not yet have concrete plans.

We are paying close attention to these important questions, but do not yet have specific answers.

- Hopeful that in our June Board meeting, the board will pass a general plan for next year, and we can get that out to the congregation shortly thereafter.
- Comment in general support of expenditure on multi-platform services: This will be a real benefit for our congregation. Folks who are out of town either temporarily or permanently, or who move away but still want to be part of the community, or who are feeling ill and want to attend but not potentially spread germs, will all have much better options if we do a good job on multi-platform worship. We can also do more collaborative work with other congregations, and not be limited by physical distance.

Vote to approve capital expenditure (by Zoom poll)

**All in favor: 92%**

**Opposed: 1 (vote cast outside of Zoom poll)**

**Abstentions: 8%**



A statement from Rev. Jennifer

In thanks for the support, reliability, generosity and easygoing nature of this congregation - both our wonderful staff and all of our individual members and attendees.

Motion to approve minutes from the 2020 Annual Meeting

**Motion:** Kelvin

**Second:** Jim D'Aloisio

**All in favor:** All present

**Opposed:** 0

Plant sale report

We made a combined \$1200 from the plant sales at First UU and at Felice and Dennis's house.

Vote to adjourn meeting

**Motion:** Susan

**Second:** Jim D'Aloisio

**All in favor:** All present

**Opposed:** 0

Chalice Extinguishing

Staff Reports  
Minister

Minister's Annual Report to the Congregation

It's been a year hasn't it? Last year when I was writing my annual report I was certain that we would, by this time this year, be past the pandemic; and yet here we are.

So, it is bittersweet to write this annual report as it will be my last since I will be retired as of June 30<sup>th</sup>. I came to this church in 2014 eight years ago. It has been a wonderful eight years. And I can honestly say this is the best job I have ever had, and you all are the best congregation.

It has been a challenging year. In my conversations with folks I have heard how very tired folks are. Much of this is caused by the pandemic and also the continued divisions within our country. In the face of that this congregation has continued to be a beacon of welcome and inclusion. We have a voice and a message that needs to be heard.

Last year the congregation voted to install technology in the sanctuary so that we could live stream the services. We did indeed do that and now on Sundays we can have people on Zoom participating in our services as well as in the Sanctuary. It has been a steep learning curve for our volunteers to get to know how to run the tech. They have done a wonderful job. Thank you to Sara Jo Brandt, Devon Kinsman, Melissa Lesley-Fox, Joe Pawletko, Susan Wadley, Matt Irish, Tina Lesley-Fox for being the group that did the research, chose the tech, and arranged for it to be installed. Thank you to Devon Kinsman, Melissa Lesley-Fox and Jim D'Aloisio for being the Sunday morning tech wonder workers.

This year we lost two more long time members, Mary Lou Colgin (98) and Marilyn Lyman (89) as well as Paul Barfoot's spouse, Steve Shabes. And John Gordon, Elna Gordon's son died as well, his life was celebrated on August 20, 2021

In our eight years together, there have been births and deaths, weddings and funerals, bridging ceremonies, child dedications, meetings, sermons, singing, some tears and much laughter.

I have seen the welcome of this congregation deepen and mature. I have been very proud that this congregation has hosted the Building Beloved Community Beyond the Binary conference. That has been a great service to our larger community and to trans and non-binary folk in our area.

We were able to have three interns in the time I was here, Bethany Russell-Lowe, Marty Pelham, and Sky Williams-Tao. In doing this we have contributed to the formation of leadership in the UUA for the future. First UU is a good teaching congregation.

I have gotten to work with three of the most excellent staff people ever – Sara Jo Brandt, Caly Doran and Tina Lesley-Fox. It has been an honor to be their day to day supervisor. I will miss our staff meetings; the support and camaraderie were profound.

I do not know what the future holds for First UU but I do know that you have the capacity to face it and grow with it. And I know that whoever the next minister is they will be very lucky to be your new minister. First UU is a wonderful congregation.

Respectfully submitted

Rev. Jennifer Hamlin-Navias

## **Lifespan Faith Development Director**

My, my what a year! This year has been a doozy. Last year we were all virtual and I was able to cobble together programming that mostly met people's needs between sending home supplies and zoom. This year we moved to a multi-platform program and that came with new and ever-changing challenges. People were no longer interested in zoom activities and parents were burned out.

Throughout the year I have offered multiple in person activities for families and people of all generations including an egg hunt, picnics, ice skating and a glow games night with a bonfire. These activities were fairly well attended. At the beginning of the year I sent home some supply bags with activities for families to do together and at Christmas I helped to put together bags of goodies for everyone in the congregation.

My role in our congregation has shifted a little this year so that I am helping more with worship and supporting people in ways that are less traditional for a religious educator. During the year I made cards for children and families and sent them through the mail and checked in with folks in a pastoral way as needed. I spent countless hours researching and working on our Covid Policies and supported our lay leaders during Rev Jennifer's sabbatical.

Our 8-12th graders have been meeting regularly first by zoom then in person. We have about 12 kids in that program and they have done things like play games, start planning for a con in the fall, hanging out in the parking lot playing outdoor games, and a pasta building challenge. Also, our middle school kids met over zoom with the kids from May Memorial for games and connection.

A few numbers...we officially had 17 children and youth registered in our program this year though that is not an accurate representation of the kids served as many families didn't get around to filling out the form. Over the course of the year I served 14 children in pre-K-8th grade, three of those families joined our program during the pandemic. In addition to those kids, we have 13 youth in 9-12th grade who have connections with our

congregation and have participated in the life of our congregation in some way. Also, since offering in person worship service, most weeks 20-30% of people attending service each week have been children and youth.

In this annual report I want to share with you what I wrote to be included in our minister search description. It is easy, during these pandemic times to forget who we are. Here is a glimpse:

*“We believe everything we do at church is faith development, that all people are still learning and that multigenerational connections are important. Our children and youth have voices that are heard and are part of the life of our congregation.*

*Historically we ran things in a traditional model of age-based classes with pre-written curriculum run by congregational volunteers. But in the few years before the pandemic our volunteer base dried up, as it has in many other congregations, and we moved to a more community based, multi age program that is driven primarily by children’s interests. Our kids between kindergarten and sixth grade all meet together on Sunday mornings and do activities that focus on justice and connection. We have experimented with multigenerational activities as well. We had several services where people of all ages began in the sanctuary together then split into smaller groups to do activities together such as making scarves for our houseless friends and walking a labyrinth. These multigenerational activities are loved by all ages. People in our congregation want to have ways to connect across ages in meaningful ways.*

*During the pandemic we have continued our programming for kids through sixth grade in a more family ministry model. During the first year and a half we sent home bags of supplies with activities for families to do together while keeping meet ups on zoom for kids to maintain their connection with each other and the church community. We have had several new families join our community during the pandemic times.*

*We are just transitioning back into some in person events and services. Our first week back 30% of the people in attendance were children and youth.*

*Our lifespan faith development director is involved in helping to plan weekly worship, sharing a time for all ages and working with the minister and worship team to make sure that everyone feels welcome in our services. We offer handiwork choices for people of all ages to use in the pews during service including things like needle point and finger labyrinths.*

*Beginning in middle school we offer collaborative programming with May Memorial. This collaboration began over ten years ago and is a strong success. Our 7-8th graders are invited to participate in a Coming of Age program that includes a heritage trip to Boston and a service at each congregation where youth share their credo statements. During the pandemic we ran this program online and cooperated with Canton UU as well. The three churches shared a service at the end of the program.*

*In their second year in this age level we offer the Our Whole Lives program. The collaboration between the two congregations means we have enough trained adults that we can offer OWL to community members as well. Offering this ministry to people outside our congregations over the years has brought new families to our churches and allowed our high school youth group to thrive. Youth make strong connections in our middle school programming and want to continue into high school. Our last group of OWL kids was large enough that we split them into two classes and offered the Parents as Sexuality Educators class while the youth were meeting in their own class.*

*Our high school youth group, called Teenz, is also a collaboration with May Memorial. This program is for 9-12th graders and historically is staffed by two youth advisors, one hired by each congregation. The Teenz is usually youth led with adult support. Due to the pandemic, our older teens who have been trained in leadership have graduated. This means that in many ways we are rebuilding this program and it will be more adult led for awhile.*

*In non-pandemic times our Teenz meet weekly on Sunday mornings for discussion, games and spiritual time. The youth decide where they want to put their energy and what is important to them. We usually host a leadership con in the fall with the central east region and host a social con every other year. Our con culture is strong in this area and many youth are*

*motivated to participate in our programming so they have the opportunity to attend cons.*

*We also have a culture of social justice and community involvement. Our youth group has taken multiple service trips over the years including trips to Haiti and West Virginia with the UU College of Social Justice. We participate in the local pride march and community fairs every year and we have a table at the NY state fair on pride day. Many of our Teenz over the years have identified as queer, trans and nonbinary. We have fostered a program where queer youth feel supported and find a spiritual home.*

*In the past we have had youth members on our board and program council. Youth are invited to participate in the life of our congregation in any way that they feel most comfortable.*

*Our Teenz have recently started meeting in person again and we have about ten youth who are showing up regularly. This summer we plan to host a youth retreat with the Central East Region staff and in the fall we hope to host our first con since before the pandemic. Our youth are excitedly planning programming and themes.”*

This year has been full of challenges and transitions. This year looked different than any previous year in the 11 years I have served this congregation. My job looked different because the needs of our congregation, families, children and youth looked different. Next year is going to look different as well. We will have a new minister, a new music director, a new office admin and a new board. Different can be good though. Over my years serving this congregation many things have shifted and changed but one thing has remained the same. The people in this congregation care for each other. You all have deep relationships and commitment to the life of this church. That is a beautiful thing and something to both be proud of and to treasure.

I say again, as I think I do every year, I am SO grateful to be serving this congregation. There is no place I would rather be and nobody I would rather be with.

Tina Lesley-Fox

## **Music Director**

This year was once again a year like no other.

The pandemic stage of Covid has continued, making service planning an ever-changing experience. We purchased and installed an AV system in the sanctuary so we could start holding multi-platform services as the Covid numbers have allowed. After Rev Jennifer's return from her sabbatical, we began using the system for services. There has been a lot of troubleshooting, but Devon and Melissa have been wonderful at figuring things out.

Members of the Individuals in Spiritual Harmony (-ISH) Choir provided support for each other virtually as they worked their way through this pandemic. We continued to make virtual choir videos, although at a slower pace. We completed 7 videos. Also, we have been using music recorded from other UU congregations for some hymns.

This is the final report I will be writing. I have so enjoyed being your Music Director these past 11 years. I will miss creating community and music with this congregation.

Sara Jo Brandt  
Music Director, First UU Society, Syracuse  
She/Her/Hers



## **President's Report**

This year's board composition:

President - Devon Kinsman

Vice President - Heidi Hart-Gorman

Treasurer - Jim D'Aloisio

Secretary - Heather Highfield

Members - Pamela Spearman, Susan Wadley, Kelly Eagan-Ledyard

Note that for the first portion of the year Heidi Hart-Gorman served as President and Devon Kinsman served as Vice-president. In March Heidi needed to step down as president. Devon Kinsman agreed to step up as president and Heidi Hart-Gorman agreed to fill the now vacant Vice-presidency to maintain a full board. This change was approved by the rest of the board, allowing us to maintain a full board while allowing Heidi to step down from most of her responsibilities.

Highlights from the year:

- The congregation has installed a new video system in the sanctuary and has begun hosting multi-platform services in late January/early February.
- The congregation has had a series of visiting ministers of various races and minorities to talk about the proposed 8th principal and what it means to Unitarian Universalism. This series has been educational and informative. The variety of different voices at the pulpit helped to widen the perspectives and the congregation's understanding of the issues faced by people of color within Unitarian Universalism and within our society as a whole.
- Covid standards and reporting methods have been a constant moving target and the board has had to review the covid policy on a monthly basis to ensure it is based on how covid metrics are being reported at that point in time.
- Rev. Jennifer Hamlin-Navias took a three month sabbatical mid-October through mid-January. The worship committee filled in during her absence. Upon her return the board and the congregation were informed of her decision to retire at the end of the church year (end of June 2022). We will miss her and wish her the best of luck in her retirement.
- The congregation's Music Director Sara Jo Brandt has finished her master's degree and has decided to leave First UU at the end of the church

year to pursue her full-time career as a librarian. We will miss her and wish her the best of luck in her new career.

- The congregation's office administrator Caly Doran will be leaving her role as office administrator at the end of May 2022 as she is expecting a child in the near future. She will continue to be a member of the congregation and we look forward to watching her family grow and supporting them. We thank her for serving as our office administrator.

- The board and Rev. Jennifer have been busy this spring coordinating hiring for the three soon to be vacant positions. At the time of this report we have hired a new office administrator and have a promising candidate for minister. The search committee for music director is moving along, they have ads out and have been in communication with a number of local musicians. We are hoping to find a new music director by the end of summer if not sooner.

Hopes for next year:

As we learn our new technology setup we are hopeful that we will be able to grow our in-person activities again. The technology in the sanctuary will allow us to continue to reach congregants who cannot attend in person and the portal in the fellowship hall during coffee hour will allow congregants in person to communicate and stay connected with those attending online.

We look forward to the journey a new minister will lead us on as we continue to learn how to live together in beloved community safely even as covid continues to spread and affect our members, friends, and loved ones.

From,  
Devon Kinsman  
President of First Unitarian Universalist Society of Syracuse

**Finance Team (See Financial Reports)**

## **Pastoral Care**

Members: The Reverends Jennifer Hamlin-Navias & Betsy Spaulding, Diane Case, Mia Rand.

Due to Covid, we had only one in person meeting in June to plan for outreach during Rev. Jennifer's Sabbatical. We divided a list of people we anticipated might need support between our members and Peggy Flanders. In June, several members had life threatening illnesses that required many trips to doctors and physical therapy for most of the year. As in the past, our major need is transportation, Peggy did a lot of driving.

After a summer trip to Star Island, a member returned with a long-lasting respiratory illness. I was able to arrange help with lunches one-two times per week during Sept, Oct., & Nov. Liz Kalish offered to help out in December.

Early in the new year several members fell, resulting in hospitalizations, therapy, & rehabilitation. With support from Liz and Randy Kalish as well as the Fayetteville-Manlius group, frequent contact was made and several lunches were delivered.

Until May 15th, Jim D'Alosio has been providing rides, he is currently recovering from surgery.

Jane Pickett has maintained a telephone tree to keep people up to date on one of these folks, in addition to her monthly organization of speakers for the Tuesday meetings at the Nottingham. The Reverends Jennifer and Jo Von Rue of May Memorial as well as Peggy have provided services.

This year we lost two more long time members, Mary Lou Colgin (98) and Marilyn Lyman (89) as well as Paul Barfoot's spouse, Steve Shabes.

A service of remembrance is being planned to honor the memories of the people we have lost during these two years of Covid.

Lucy Marr's beloved service dog, Jayden, died suddenly and was remembered.

Another member's husband had a stroke requiring 24/7 care. No doubt there were others who were ill and managed without our assistance.

We have mainly relied on phone, texts, email and mail to maintain contact. We are grateful for ongoing and generous support of our committee and community members without whom this work would not be possible.

Respectfully, Diane Case

## **Membership**

Committee members: Randy Kalish (Chair), Elna Gordon, Eileen Taveniere, Heather Highfield, Don Marr, Joe Pawletko, Matt Irish

Due to the pandemic, no formal meetings were held this year. No new members joined. I am resigning from the Committee and wish to thank all of those who helped us in the past.

When in person restrictions recede, it will be interesting to see what happens regarding getting new members.

Respectfully submitted,

Randy Kalish

## **Worship and Music Ministry**

The worship committee usually provided two services a month from Sept. through June. Last summer, we shared services with May Memorial and Utica and will do so again this coming summer.

For the most part, we followed the themes in Soul Matters, a guide to worship provided by UUA. In December, we added a Solstice service that was in addition to our regular meetings. This June we will do a summer Solstice service as a regular service joined by May Memorial.

Our zoom and later hybrid services averaged 28-35 people. The first hybrid service in April had a higher attendance.

We are enormously thankful to Sara Jo who ran most of the zoom services, to those those who recorded readings and hymns for us, and to the magnificent tech crew who met the challenge of hybrid services.

Susan Wadley, Chair

Members:  
Don Marr

Devon Kinsman  
Peggy Flanders  
Kaaren Remley  
Keith Bertrand  
With Paul Barfoot as a spring volunteer

## **Nominating Committee**

Recommendations for the Slate of Officers and Board for 2022-23:

Officers:

President: Devon Kinsman (term: 1 year, 1st year of possible 3)  
Vice President: Paul Barfoot (term: 1 year, 1st year of possible 3)  
Treasurer: Susan Wadley (term: 1 year, 1st year of possible 5)  
Clerk: Heather Highfield (term: 1 year, 5th year of possible 5)  
Financial Secretary: Julia Schult (term: 1 year, 2nd year of possible 5)

Board of Trustees:

TBD (term: 1 years, 2022-2023 to finish Susan Wadley's incomplete term)  
Kelly Eagan-Ledyard (term: 3 years, 2021-2024)  
Randy Kalish (term: 3 years, 2023-2025)

Nominating Committee: New Members to be voted on

Betsy Spaulding (term: 3 years, 2023-2025)

Returning Committee Members:

Eileen Taveniere (term: 3 years, 2020-2023)  
Michael Messina-Yauchzy (term: 3 years, 2021-2024)  
Don Marr (term: 3 years, 2021-2024)

Board Liaison: Clerk, Board of Trustees (Heather Highfield)

We thank:

- Pamela Spearman, who finished her term as Trustee this year.

- Elna Gordon, who completed her term on the Nominating Committee (ending early this year due to family emergency)
- Devon Kinsman for willingness to step in as President in place of Heidi and be nominated again for the coming year
- All those who have accepted nomination to elected positions in a very difficult time.

## **First Unitarian Universalist Society of Syracuse - Finance Team Annual Report 2022**

Members: Jim D'Aloisio – Chair and Treasurer; Julia Schult - Financial Secretary; Susan King - Personnel Rep; Melissa Lesley-Fox – Bookkeeper; Cliff Mellor - Trust Representative; and Janet Mallan, at-large member

We met via Zoom most, but not all, months, typically at 7 PM on the 2<sup>nd</sup> Tuesday of each month.

Here's a snapshot of how some of our metrics have changed, over the past five years:

	<b>FY 17-18</b>	<b>FY 18-19</b>	<b>FY 19-20</b>	<b>FY 20-21</b>	<b>FY 21-22</b>	<b>22-23 (Proposed)</b>
<b>Total Pledge Income</b>	106,841	108,350	121,665	111,000	114,035	103,500
<b>Pledging Units</b>	83	77	71	66	68	55
<b>Denominational Contributions</b>	5,000	11,949	10,754	10,607	11,560	11,579
<b>Total Budgeted Expenses</b>	200,989	227,187	241,572	190,377	236,419	222,054
<b>Amt. Budgeted from Investments</b>	44,000	62,977	62,175	43,987	74,497	72,154
<b>Capital Expenses Paid</b>	20,862	37,515	227,269	0	19,326	
<b>Unrestricted Fund (1 May)</b>	344,617	318,497	277,304	342,460	269,205	
<b>Restricted Funds (1 May)</b>	185,493	172,047	150,532	199,598	163,433	
<b>Total Investments (1 May)</b>	530,110	490,544	427,836	542,058	432,638	
<b>Debt = LOC + Loans (1 May)</b>	73,367	50,232	234,053	219,007	219,370	
<b>Investments Minus Debt (1 May)</b>	456,743	440,312	193,783	323,051	213,268	

This is my last year as Treasurer after five years in the position. A few of the highlights of the last five years:

- The Finance Team is great! Most of the members have been active for many years, and the addition of Julia last year as Financial Secretary was a great addition to the team. Rev. Jennifer attended most of our meetings, which has been extremely useful.
  - We are gifted to have an amazingly dedicated and functional Bookkeeper in Melissa. A sincere thank-you to them, for the performance of regular duties as well as all of the “above-and-beyond” work.
  - Switching our checking and savings accounts to the locally based Cooperative Federal Credit Union was a great step that we took a few years ago. They are strong supporters of the Syracuse community.
  - We switched most of our investments to fossil-fuel free mutual funds a few years ago. Thanks to Sunny Aslam and Katelyn Kriesel for the encouragement, and to our financial advisor Mike McCann for doing it.
  - We have recently engaged the services of Jim Pompo, CPA, to apply for a Federal Employees Retention Tax Credit, for which we are eligible. Stay tuned!
  - As of this writing the Nominating Committee has not yet found a new Treasurer. Not sure how this will be resolved, but I will say that the role of Treasurer is much less strenuous than it was a few years ago. Our bills are paid electronically, and Melissa reconciles the accounts and prepares the reports, with no input from the Treasurer. Under the circumstances, I'll plan to stay on as Finance Team Leader, for now.
- Jim D'Aloisio, Finance Team Leader and Treasurer

	FY 19 - 20 Budgeted	FY 21-22 Budgeted	FY 21-22 through Apr	FY 22-23 Proposed Budget	NOTES
<b>Income</b>			83%	18 May 2022	
<b>4100 · Contributions</b>					
4101 · Plate Offerings	\$ 14,000	\$ 7,500	\$ 6,357	\$ 5,000	We need to be realistic.
4102 · Offerings - Special	\$ 500	\$ 500	\$ 575	\$ 500	
4104 · Pledges/cash basis current yr					
4105 · Mid-year pledge	\$ 3,500	\$ 3,500		\$ 3,500	New pledges received during the year
4104 · Pledges/cash basis current year	\$ 118,165	\$ 110,535	\$ 86,239	\$ 100,000	<< \$99,600 as of 18 May
<b>Total 4104 · Pledges/cash basis</b>	\$ 121,665	\$ 114,035	\$ 86,239	\$ 103,500	
<b>4200 · Fundraisers</b>					
4210 · Garage Sale			\$ -		
4200 · Fundraisers - Other	\$ 5,000	\$ 5,000	\$ -	\$ 5,000	We need to work to make this happen.
<b>Total 4200 · Fundraisers</b>	\$ 5,000	\$ 5,000	\$ -	\$ 5,000	
4310 · Pledge Reserve	\$ (5,908)	\$ (5,527)		\$ (5,000)	5% pledge shrinkage budgeted
<b>Total 4100 · Contributions</b>	\$ 135,257	\$ 121,508	\$ 93,171	\$ 109,000	
<b>4400 · Other Income</b>					
4230 · Boutique	\$ 200		\$ -		
4420 · Betts Estate Trust	\$ 9,000	\$ 8,000	\$ 5,871	\$ 7,500	best estimate
4440 · Miscellaneous Income	\$ 1,700	\$ 2,000	\$ 1,385	\$ 2,000	
<b>Total 4400 · Other Income</b>	\$ 10,900	\$ 10,000	\$ 7,256	\$ 9,500	
<b>4500 · Facility income</b>					
4521 · Montessori	\$ 16,740	\$ 18,414	\$ 16,000	\$ 18,900	5% increase. MDS agreed.
4523 · Rental Income	\$ 15,000	\$ 12,000	\$ 5,193	\$ 12,500	<< We need to work to make this happen.
<b>Total 4500 · Facility income</b>	\$ 31,740	\$ 30,414	\$ 21,193	\$ 31,400	
<b>Total Income</b>	\$ 177,897	\$ 161,922	\$ 121,620	\$ 149,900	
<b>Expenses</b>					
<b>6100 · Facilities</b>					
6110 · Utilities	\$ 5,000	\$ 3,800	\$ 5,460	\$ 5,000	Recommended by Matt
6111 · Waste Disposal	\$ 1,400	\$ 1,400	\$ 871	\$ 1,400	Recommended by Matt
6112 · Water	\$ 270	\$ 270	\$ 216	\$ 270	Recommended by Matt
6113 · Sewer District	\$ 1,500	\$ 1,500	\$ 1,022	\$ 1,500	Recommended by Matt
6121 · Lanscaping/snowplowing SNOW SHOVELING	\$ 7,500	\$ 7,500	\$ 5,850	\$ 7,500	Recommended by Matt
				\$ -	<< \$500 Recommended by Matt
6130 · Maintenance and Repair items	\$ 2,550	\$ 2,550	\$ 2,600	\$ 2,550	Recommended by Matt
6131 · Maintenance Contracts	\$ 1,350	\$ 1,495	\$ 1,010	\$ 3,050	Recommended by Matt, with breakdown
6140 · Cleaning Service	\$ 17,700	\$ 12,500	\$ 11,395	\$ 12,000	<b>This will require review</b>
6141 · Janitorial supplies	\$ 1,200	\$ 900	\$ 636	\$ 1,200	Recommended by Matt
<b>Total 6100 · Facilities</b>	\$ 38,470	\$ 31,915	\$ 29,060	\$ 34,470	
<b>6200 · Administrative Expenses</b>					
6209 · Admin services	\$ 1,600	\$ 1,500	\$ 1,131	\$ 1,500	Breeze \$67/month; Zoom \$120 annual
6210 · Admin supplies	\$ 250	\$ 300	\$ 230	\$ 350	Caly suggests slight increase
6211 · Postage	\$ 2,200	\$ 250	\$ 23	\$ 250	Recommended by Caly
6220 · Telecommunications	\$ 600	\$ 2,200	\$ 1,891	\$ 2,200	Recommended by Caly
6221 · Copier Lease	\$ 325	\$ 600	\$ 201	\$ 600	Recommended by Caly
6222 · Website Support	\$ 4,180	\$ 325	\$ 300	\$ 325	Recommended by Caly
6223 · Insurance Building/liability	\$ 1,800	\$ 4,180	\$ 2,767	\$ 4,180	
6224 · Payroll Processing	\$ 1,800	\$ 1,200	\$ 1,150	\$ 1,200	
6230 · Finance manager	\$ 7,315	\$ 7,534	\$ 6,371	\$ 7,534	<< Same as last year. Melissa consented.
6250 · Finance Team					
<b>Total 6200 · Administrative Expenses</b>	\$ 20,070	\$ 18,089	\$ 14,064	\$ 18,139	
<b>6300 · Worship &amp; Music</b>					
6310 · Worship & Music Ministry	\$ 850	\$ 850	\$ 879	\$ 850	
6321 · Accompanists & Performing	\$ 1,855	\$ 1,555	\$ 1,175	\$ 1,555	
6330 · Music supplies	\$ 751	\$ 451		\$ 451	
6331 · Copyright Licenses	\$ 404	\$ 404		\$ 404	
6332 · Organ & Piano Tuning/Repairs	\$ 620	\$ 620		\$ 620	
6340 · Sabbatical Expense		\$ 2,500	\$ 1,830		
<b>Total 6300 · Worship &amp; Music</b>	\$ 4,480	\$ 6,380	\$ 3,884	\$ 3,880	



	FY 19 - 20	FY 21-22	FY 21-22	FY 22-23	
<b>6400 · Lifespan Faith Development</b>					
6410 · Supplies & expenses	\$ 1,690	\$ 1,690	\$ 735	\$ 1,200	Recommended by Tina
6420 · Teenz	\$ 300	\$ 300		\$ 300	Recommended by Tina
6450 · Adult LFD	\$ 200	\$ 100		\$ 100	Recommended by Tina
<b>Total 6400 · Lifespan Faith Development</b>	<b>\$ 2,190</b>	<b>\$ 2,090</b>	<b>\$ 735</b>	<b>\$ 1,600</b>	
<b>6500 · Community Outreach Ministry</b>					
6520 · Interfaith Works	\$ 100	\$ 100	\$ 100	\$ 100	
6521 · ACTS	\$ 500	\$ 500	\$ 500	\$ 200	
6525 · Community Outreach Ministry	\$ 100	\$ 50		\$ -	
<b>Total 6500 · Community Outreach Ministry</b>	<b>\$ 700</b>	<b>\$ 650</b>	<b>\$ 600</b>	<b>\$ 300</b>	
6600 · Congregational Care & Growth	\$ 1,000	\$ 100		\$ 100	Including Coffee Hour expenses
6700 · Congregational Relations Cmte	\$ 100	\$ 50		\$ 0	
<b>6900 · Denominational affairs</b>					
6910 · UUA Annual Program Fund	\$ 10,754	\$ 11,560	\$ 8,940	\$ 11,579	Fair Share per UUA APF Dec '21 letter
<b>Total 6900 · Denominational affairs</b>	<b>\$ 10,754</b>	<b>\$ 11,560</b>	<b>\$ 8,940</b>	<b>\$ 11,579</b>	
<b>6950 · Other</b>					
6960 · Child Care	\$ 2,400	\$ 1,800		\$ 2,400	37 Sundays, 2 hrs, 2 ppl, \$15/hr
6970 · Line of Credit Interest Paid		\$ 12,500		\$ 12,500	(\$100k+\$20k) @4% for 30 years
<b>Total 6950 · Other</b>	<b>\$ 2,400</b>	<b>\$ 14,300</b>	<b>\$ -</b>	<b>\$ 14,900</b>	
<b>7000 · Staff Salaries</b>					
7010 · Minister Salary & Housing	\$ 54,107	\$ 55,730	\$ 46,778		<b>3/4 of FT - \$51,000</b>
Minister Salary			\$ 23,389	\$ 25,500	<b>For tax law purposes, we must clarify</b>
Minister Housing			\$ 23,389	\$ 25,500	<b>what is salary and what is housing</b>
7015 · Ministerial Intern	\$ 10,875				
7020 · Music Director	\$ 13,001	\$ 13,391	\$ 11,323	\$ 14,000	<< 736 hours
7030 · Director of Lifespan Faith Deve	\$ 20,801	\$ 21,425	\$ 18,117	\$ 21,425	Salary kept the same. Tina consented.
7031 · Teen Advisor	\$ 3,075	\$ 3,000		\$ -	Tina consented. Some program compromise
7040 · Secretary	\$ 9,832	\$ 10,634	\$ 8,740	\$ 11,000	722 hrs, \$15/hr min. wage as of 1 Jan 23
AV Consulting				\$ 1,000	<< consulting as needed
<b>Total 7000 · Staff Salaries</b>	<b>\$ 111,691</b>	<b>\$ 104,180</b>	<b>\$ 84,958</b>	<b>\$ 98,425</b>	
<b>7100 · Staff Benefits</b>					
7110 · Health Insurance					
7112 · Health Insurance-Minister	\$ 13,255	\$ 15,310	\$ 13,220	\$ 8,125	80% of Silver Plan, 10% increase (estimate)
7114 · Health Insurance - Intern	\$ 750			\$ -	
7116 · Health Insurance-LFD Director	\$ 7,775	\$ 8,980	\$ 7,395	\$ 9,878	Assumed 10% increase (estimate)
<b>Total 7110 · Health Insurance</b>	<b>\$ 21,780</b>	<b>\$ 24,290</b>	<b>\$ 20,615</b>	<b>\$ 18,003</b>	
7130 · Pension Plan	\$ 8,791	\$ 9,055			10% Minister, LFDD
7132 · Pension Plan-Minister			\$ 5,076	\$ 5,490	
7136 · Pension Plan-LFD Director			\$ 1,812	\$ 2,143	
7138 · Pension Plan-Music Director			\$ 1,139		New person will not qualify
<b>Total Pension Plan</b>			<b>\$ 8,027</b>	<b>\$ 7,633</b>	
7140 · Short term Disability Insurance	\$ 1,284	\$ 300	\$ 118	\$ 300	
7150 · Workers Compensation Insurance	\$ 1,000	\$ 750	\$ 423	\$ 750	
7160 · Long-term Disability	\$ 1,115	\$ 780	\$ 586	\$ 780	
7170 · Employer Social Security	\$ 8,309	\$ 8,080			
In lieu of SECA			\$ 3,607	\$ 3,902	7.65% x minister S+H
Employer Social Security - FICA			\$ 2,806	\$ 3,643	7.65% x salaries
7180 · NY Paid Family Leave					To be deducted from staff salaries
<b>Total 7100 · Staff Benefits</b>	<b>\$ 42,279</b>	<b>\$ 43,255</b>	<b>\$ 36,182</b>	<b>\$ 35,011</b>	
<b>7200 · Continuing Education</b>					
7210 · Minister	\$ 4,058	\$ 2,000		\$ 2,000	<< \$8000 per UUA guidelines
7220 · Music Director	\$ 1,300	\$ 650		\$ 650	
7230 · Director of Lifespan Faith Deve	\$ 2,080	\$ 1,200	\$ 500	\$ 1,000	<< Tina \$1200-\$2080
<b>Total 7200 · Continuing Education</b>	<b>\$ 7,438</b>	<b>\$ 3,850</b>	<b>\$ 500</b>	<b>\$ 3,650</b>	
<b>Total Expense</b>	<b>\$ 241,572</b>	<b>\$ 236,419</b>	<b>\$ 178,923</b>	<b>\$ 222,054</b>	
<b>Income Minus Expense</b>	<b>\$ (63,675)</b>	<b>\$ (74,497)</b>	<b>\$ (57,303)</b>	<b>\$ (72,154)</b>	<b>Amount transferred from investments</b>