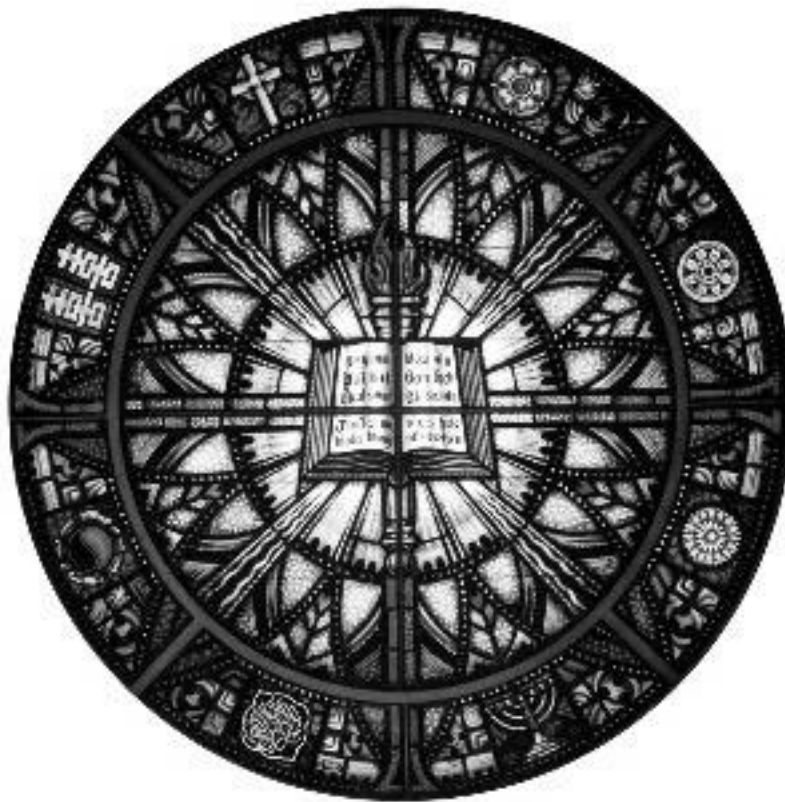


Annual Report 2023

First Unitarian Universalist Society of Syracuse



Annual Congregational Meeting

June 11, 2023

First Unitarian Universalist Society of Syracuse
Annual Report 2022-2023

ANNUAL REPORT AND ANNUAL MEETING INFORMATION 2022-2023

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ANNUAL MEETING AGENDA- SUNDAY, JUNE 11, 2023

1. Call to Order / Chalice Lighting
2. Selection of a Moderator
3. Approval of last year's Annual Meeting Minutes
4. Receipt of Reports, including Nominating Committee. Highlights?
5. Recognition of Life Members
6. Election of Board, Officers and Nominating Committee
7. Approval of Operating Budget for FY 2023-2024
8. Approval of Capital Projects Budget for FY 2023-2024
9. Updated COVID Policy
10. Chalice Extinguishing / Adjournment

Annual Meeting Minutes – Sunday, June 5, 2022

Meeting called to order

11:36AM

Quorum verified

at **36** voting members

Chalice Lighting

Rev. Jennifer

Motion: Nomination of moderator

Nominated: Jim D'Aloisio

All in favor: 36

Opposed: 0

The motion passes.

Receipt of reports

Proposed slate of officers (Nominating Committee)

President: Devon Kinsman (term: 1 year, 1st year of possible 3)

Vice President: Paul Barfoot (term: 1 year, 1st year of possible 3)

Treasurer: Sue Wadley (Term: 1 year, 1st year of possible 5)

Trustees: Kelly Eagan-Ledyard (2024), Randy Kalish (2025), **Pending Nomination(2023)**

Clerk: Heather Highfield (5th term)

Financial Secretary: Julia Schult (term: 1 year, 3rd year of possible 5)

Nominating committee new members: Betsy Spaulding (term: 3 years, 2023-2026)

(Returning Nominating Committee members: Eileen Taveniere (2020-2023), Michael Messina-Yauchzy (2021-2024), Don Marr (2021-2024))

Vote to approve slate of officers (by Zoom poll)

Motion: Paul Barfoot

Second: Joe Pawletko

All in favor: 100% (all present)

Opposed: 0%

Approval of budget for FY 2022-2023

(2022 Annual Meeting Minutes Continued)

Discussion

Jim: As Treasurer (not as Moderator)

- The total budget for pledges is just over \$103,000.
- A few significant points:
- We need to beef up our fundraisers in order to make our proposed budget!
- We need to raise rental income and do some other work to make sure we make income lines.
- Expenses: Tina Lesley Fox, our Lifespan Faith Development Director, and Melissa Lesley-Fox, our bookkeeper, have voluntarily agreed not to take any increases in salary or benefits this year in order to help us meet our needs for a minister compensation package.

We have some revisions to make from the floor:

- We created our budget as well as we could around a prospective contract for an interim minister. Over the past week, the Board has had discussions with a prospective minister, and in our negotiations we saw fit to raise the total compensation package by \$2,000.
- We also agreed to include dental and life insurance.

– Question: Regarding the \$74,310 coming from our investments. What is the total of our investments?

– Answer: As of right now it's approximately \$435,000.

– In favor of this budget: The Board, finance team, and hiring committee have done incredible work to craft a budget and compensation package that are realistic, balanced and forward-looking.

– Question: In the Annual Meeting the year before last, someone made a comment on the advisable amount for us to take out from our investments every year. What was that number? Are we surpassing that?

– Answer: The recommendation is to take a significantly smaller amount, something like \$35,000 to maintain our endowments. We are taking about double the recommended amount. This represents a deliberate attempt to use our endowment to return to our pre-Pandemic congregational health. It is not long-term sustainable, but in the immediate short term we believe it is the right thing to do.

Vote to approve 2022-2023 budget

Motion: Randy Kalish

Second: Betsy Spaulding

All in favor: 100%

Opposed: 0%

Abstentions: 0

(2022 Annual Meeting Minutes)

New Minister news!

We are excited to announce that we have extended a potential offer to Rev. Molly Hammerhand. (Rev. Molly uses fae/faer/faers pronouns: ex. “Fae is / fae does / to faer / for faer / this is faers”)

Chair of the ministerial search committee, Steve Doles, reads a blurb about Rev. Molly for the congregation. The committee is very excited about faer and believes fae is a great match for our congregation.

The rest of the committee is Pamela Spearman, Susan Wadley, and Heather Highfield.

Rev. Molly will come on board as a $\frac{3}{4}$ time interim minister, serving a 2-year term with option to renew.

The 8th Principle of Unitarian Universalism

Discussion:

–Jim reads the first paragraph of Article 2, Section 1 of our Constitution.

–Speaking in favor of adding the 8th Principle to the Constitution: It holds our feet to the fire to examine everything we do in the light of anti-racist work.

–Question: Is this just something we are doing, or is this something the UUA is doing?

–Answer: The UUA is undergoing a process that may some day result in

–Question: How is this not covered by respecting the inherent worth and dignity of every person?

–Answer: Our UU friends of color / BLUU have asked congregations to be intentional in specifically addressing the effects of white supremacy in our congregations. Nonwhite people have been specifically targeted in the past, and we cannot address racism without a similar specific targeting of that reality.

–Unitarian Universalism does not have the best track record of actually supporting our friends and members of color in the past. The original words about worth and dignity were not lived up to, so the same words can't be used to address the ongoing effects of that.

–The second part talks about dismantling racism. The word dismantle is negative. I am not sure I like this wording and I'm not sure if I can vote for it - is it possible to change it to be more positive?

–The 8th Principle was written by UUs of color. Those are words that they feel we need to be thinking about and working within. I don't feel like I as a white male have a place to tell them that the words they thought we needed to hear are not what we need to hear.

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–Responding to negative language: 2 negatives make a positive. Racist systems are a negative, and dismantling those is a positive.

–I am torn. The wording is a departure from the other principles and is too long.

–As a person of color, I am reading every day about how people of my race are facing violence and brutality. We are at a moment in this country where nonwhite people including my friends and loved ones are being hurt and harmed every day, both by systems and by individual violent actions, and I am deeply upset at being part of this congregation and hearing my fellow congregants say that we need to debate words.

– As the mother of a nonwhite person, I am deeply distressed at the suggestions of wordsmithing. My daughter is afraid to go out without basically an escort. She should not feel imprisoned in this country she belongs to. There have been times when UUs of color have made a request and the denomination did not rise to the occasion. We cannot afford to do that anymore.

Vote to approve (by Zoom poll)

Motion: Tina Lesley-Fox

Second: Michael Messina Yauchzy

All in favor: 100%

Opposed: 0%

The motion passes.

Motion to approve minutes from the 2021 Annual Meeting

Motion: Heather Highfield

Second: Sue Wadley

All in favor: 100%

Opposed: 0%

The motion passes.

Vote to adjourn meeting

Motion: Paul Barfoot

Second: Betsy Spaulding

All in favor: 100%

Opposed: 0%

The motion passes.

Chalice Extinguishing

**Minister's Annual Report
Fiscal Year 2022-2023**

Wow, you all. Just... wow.

This has been quite a year, in all the ways. Parts of it have been predictably difficult: we've seen a near-complete staff turnover, welcomed not only me as your new minister but Julie Forget as our Office Assistant and Emery Schramm as our Music Director and organist, and resettled into a stable rhythm of week-to-week, then month-to-month, congregational life after the stresses wrought by a nearly-three-year lockdown of the church building. (Whew!) Even in Lifespan Faith Development, where we retained our amazing Director Tina Lesley-Fox, the playing field and landscape of lifespan faith development has changed so dramatically that we could rely on very little of what we "knew" to be one-time best practices as we learned to work together.

It would dishonor all the efforts and striving we've made together in the last year to downplay this, so I won't! This has been hard, hard work. The learning curve—for all of us—has been high, and we know the hows and whys of this work matter as we do it. Through the changes we've experienced this year, we've been bolstered by our knowledge and experience of this congregation's capacity for deep welcome, its grace for trial and error, and its patience with experimentation.

I've led 28 worship services this year for FUUSS, and co-led two services over the summer with Rev. Jo at May Memorial UU. We had two Music Sunday services co-led and planned by me and Emery; and I've coordinated and arranged three worship guests: Rev. Craig Schwalenberg and Rev. Evin Carvill-Ziemer both brought their presence as guest worship leaders for us, and Karen Mihalyi and the Syracuse Community Choir helped to ground us in song for one participatory service.

A congregational highlight was the Building Beloved Community Beyond the Binary conference, the first to be held since just prior to Covid lockdown in early 2020. We had 57 in-person attendees, 10 virtual, for a total of 67 attendees; representing four states including NY, MA, VA, and FL. A generous grant from NYSCU was able to defray much of the expense and allowed us to forgo specific fundraising this year while we rebuilt capacity. This prudent use of UU community resources, as well as the collaborative support of the Q Center at ACR Health, afforded us seed money for next year's conference and ensured that BBCBB has indeed survived the lockdown stage of the pandemic! Of personal note was the workshop I developed and ran with the collaboration of SU student Scout Reinkraut on the connection between neurodivergence and gender variance and how to recognize harmful myths and language about this confluence of identities. A special thanks to our planning committee, which included FUUSS community members Tina, Melissa, and Amelia Lesley-Fox; Cam Gee; Coran Klaver; and Rick Olanoff. The committee also included local and further-flung community leaders Hilary Avallone; Mary Cupelo; Andie Davis; Ashley Davis; Jessica Dennison; Karen Fuller; Leo Greer; and Charlye Rosamilia.

The Minister's Discretionary Fund has had two uses this year. One use was in the amount of \$350, and one use in the amount of \$710, for a total of \$1060 given. Two significant financial gifts were received this year. The first was an amount of \$50,000 to establish the Lesley Fund for Innovation. This generous gift was given in memory of Lesley

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(Ministers Report continued)

Barfoot by her son Paul. The Lesley Fund will support the awarding of an annual prize by the Board in March of each year, funding a proposal from within the congregation that would further congregational innovation and future Unitarian Universalist leadership. In the '22-23 fiscal year, the Board voted that the Lesley Fund will finance a materials update and infrastructural upgrade to the congregation's justice library. The review and archiving of our current library's materials and historic congregational archives will be undertaken as part of this upgrade. Conversations are underway to move our archival material to the collection of the Syracuse University library, which would provide a secure place where this information can be kept and referenced for posterity.

The second financial gift received this year was an anonymously granted amount of \$20,000-30,000, earmarked to fund facilities improvements. Board members Jim D'Aloisio and Randy Kalish are working with the Facilities Team to discern needful priorities for the most effective use of this generous gift.

We lost four members and former members, and one friend to death this year: we remember with love Kathleen Manning Sobotka, Tim Rice, Georgia Schneider, David Lyttle, and Barbara Meldrum. I've officiated 3 memorial services this year: one for a member, one for an involved friend of FUUSS, and one off-site for a non-member.

First UU has welcomed four new members this year: Qudsia Chaudhry, Wil Murtaugh, Cam Gee, and Sarah Burnett-Wolle. In addition, we commemorated Gretchen Barfoot's membership, which began during the pandemic and had not been celebrated with a new member ceremony.

This year—theologically, relationally, developmentally—has been an important one for us. It's been a year of reestablishing not only who we are as individuals (as staff, as ministry teams, as congregants, etc), but who we are together. In practice, this has played out as you showing me again and again who you are... and that's one of the best, most immersive, and charming ways to learn a system and how to love it well. I look forward to loving you well into the next year, and being able to say "wow" over and over.

Lifespan Faith Development Director's Report

This has been a different kind of year than years past. Seems like we have said that a lot recently. Our previous two years looked nothing like years before pandemic times and this year looked different than the stay at home times. It has been so exciting to be together in person with those who are able to come to things in person and I am so grateful we continue to have a virtual option for those people who want or need to engage in that way. I am proud of the ways we are learning and growing together as a community. Finding ways to stay connected and make new relationships while also nurturing relationships we have had for years.

This year has been full of new things! We got three new staff, some new people on our board, new members, friends and families. We learned together how to make sure our air is cleaned so that we can reduce viral spread. We learned how to run a tech system and how to troubleshoot the sound when it goes wonky. We learned how to meet the needs of people in all ages worship every week. Our high school youth had an opportunity to learn how to run a con and relearn how to be in covenant with each other in person. Our middle school youth spent the year learning comprehensive sexuality education through the Our Whole Lives program. Our littlest community members learned that they too are always welcome in our sanctuary.

We made new relationships and fostered old ones with other community organizations such as Q Center, ACR Health, We Rise Above the Streets, Interfaith Works, St. Lucy's, Eastern Farm Workers, Syracuse Community Choir, ACTS, Vegan CNY and others. Developing those connections makes our city stronger and serves our mission, justice with love and joy, open to awe. Showing up and partnering with other organizations also builds our church community. People feel good when they have an opportunity to serve and to do things together.

Some other highlights from this year include many hikes, a trip to the Everson museum, fires on the patio, game day, take a part day, a Halloween party, zoom movie nights, the Building Beloved Community Beyond the Binary conference, new nearly silent air purifiers, ice skating, winter sowing workshop, the return of our no rehearsal Christmas pageant in person, and we hosted first in person youth con since the pandemic anywhere in the country.

My job looks very different than it did a few years ago, as do many things in our congregation and the world. I am supporting young adults more than I have in the past (we have young adults in our congregation!!!), we are running our educational and other programming multigenerational (this is a fantastic change that I believe is serving our people well right now), and I am supporting overall programming of the church in larger and different ways.

(Director of Lifespan Faith Report continued)

I know that sometimes it might feel like religious education/faith development isn't happening but I want to assure you it is. It also looks different than it used to.

Watching adults and kids climbing trees together, listening to a six year old sharing with an elder about something she was learning, watching one of our very shy teens in our kitchen with a large group of people planting seeds and sharing excitement about the discovery that snapdragons are edible, hearing youth talk about how this place is one of the only places they feel completely accepted and safe, seeing the smiling faces of our friends on zoom the big screen in the sanctuary, having a zoom room full of youth

and young adults working with a few of us older folk to make the gender conference happen, providing the opportunity for one of our youth to speak out and attend their very first protest march, listening to one of our kids from the nursery talk to himself and his baby doll during service...these moments are why we do church. This is faith development. Every piece of it, each of these moments. This is how we build community and how we help people feel connected to our faith.

It has been just a little over a year since we had our first in person service after lock-down time. Back at that point we had a limit on how many people could come to service and people had to register ahead of time. We had taped off pews and people were spread out all over the sanctuary. We had no singing.

Look how far we have come from then! And still, we are in a transition time. Where people are finding their place in the world. Figuring out where they belong and how they want to be involved with the community. I am proud of First UU and the ways we are opening our doors for new and old people and finding ways to meet people where they are instead of expecting things to go back to the way they were.

Thank you to all of you for holding a vision of what First UU is and can be in the future. I say again, as I do every year, I am honored and blessed to serve this congregation.

Tina Lesley-Fox
Director of Lifespan Faith Development

Music Director Annual Report

As we come to the end of this undeniably strange season, there are many things upon which to reflect and for which to be grateful. I entered this position during a heavily transitional time— not only in the sense that I was one of three new staff members, but also in the sense that we were coming off of two years of frightening uncertainty due to the COVID-19 pandemic. Despite all of that, I believe that we had a very successful year at First UU and in the music department, which is all thanks to the wonderful community and support systems in place that keep this church running.

The 'In Spiritual Harmony' Choir began meeting mid-September, a few weeks into the service season. At that time, the community COVID numbers were still high enough that singing was not permitted in the building, so the choir's first in-person performance of the year was on boomwhackers! Shortly after our boomwhacker serenade, we were granted permission to have one singer performing at a time; the next few services involved a soloist performing the opening and closing hymns, which was a welcoming nudge back towards community music making. By the middle of October, the choir was cleared to sing together, which was a very exciting moment! Since then, the choir has practiced and performed a new anthem, on average, every month during our normal Sunday services. Outside of the typical services, First UU also hosted two music services, as well as a Christmas Eve service, all of which involved the choir, the organ, and outside performers. We have had guest musicians from Syracuse University, from within the First UU community, and from the greater CNY community. I am very happy with the amount of music that has been able to ring through our sanctuary this year, and I look forward to another year of working with this wonderful community!

Looking towards the future, I have two main goals for the music department as a whole: One of my goals for next season is to increase the frequency of musical guests. The more musicians we can bring in, either from outside of, or within the First UU community, the more variety of musical style and expertise we can witness, and the higher the chance that a young person may be inspired to pursue music in the future. My other larger goal for the music department is to make the choir more involved in services week to week. This means a couple of things to me: I would like to get on a solid schedule of performing an anthem during services every other week, as opposed to monthly. This will involve working on more than one piece at once, which the members of the choir have expressed interest in. I would also like to get the choir more involved in the hymns that we perform each week by adding harmony parts, and musical elements beyond the notes and rhythms. Small things like that can help enhance the experience that the congregation gets during our services.

Thank you for a wonderful year, and I sincerely look forward to being with you again for the 2023-2024 season!

Emery Schramm, Music Director

Board President Report

This year (2022-2023) has been a year of reopening and renewing for First Unitarian Universalist Society of Syracuse. We started the year with three new staff members; a new office administrator, a new music director, and a new minister! Our continuing staff, Tina Leslie-Fox and Melissa Leslie-Fox (Lifespan Faith Development Director, and Bookkeeper respectively), and their knowledge of this community and the workings of this church from their numerous years with us, have been invaluable in helping our congregation through this transition. We are so grateful to have them with us in the past and in the coming years.

This year we have done a range of activities as a congregation, from hikes at local parks organized and lead by Tina, to restarting the Beyond the Binary Conference which had been an important part of this congregation for several years prior to 2020. We have also seen the rejuvenation of our facilities team as they have met over coffee and cleaning to discuss and address the needs of our building.

Like any animal coming out of hibernation, it is a process, and to be going through this process with three new staff has certainly been an adventure and a learning process for all involved. However, we are learning, we're growing, and we're coming out of this year as an increasingly involved and active congregation.

It has been a joy this year watching our staff, new and old, find their footings working as a team in new ways. They are reaching a place where they are prepared and eager to play together in the creative dance that is service planning and supporting our congregation. I'm eager to see what the next year holds as we head into a second year with our newer staff. We're looking forward to another year of varied, entertaining, and thoughtful services.

Devon Kinsman

Facilities

Members: Matt Irish, Jim D'Aloisio, Beth Geis-Waldron, Susan King, Janet Mallen, Lora McCooley

Facilities has been busy with miscellaneous repairs mostly of bathrooms and the elevator. It has been nice not to get an elevator call for some time so hopefully nobody is stuck in there.

After a noticeable lack of lawn care we were shocked and saddened to learn of the death of Phil from Lawn Tech. Moving forward we are getting pricing and working to line up a new lawn service.

Lastly we are setting some strategic priorities for project in the upcoming year. Any landscaping or painting volunteers out there?

Report from our Treasurer

The good news is that we are within our budget this year thanks to various savings and donations. Please see the reports on the following pages.

The bad news is that creating a budget for next year is hard as the number of our pledge units is down from 55 to 48. Our pledged amount (May 30) is about \$84,000 versus \$100,000 last year. Creating a budget is hard, but Jim and the Finance Team have been superb.

That takes me to the really bad news: we have a line of credit of \$214,000 and with the increase in interest rates, we will be paying \$18,000 in interest this coming year. That is a huge hit to the budget. Paying down that line of credit is essential and needs some significant attention as it leaves our finances in peril.

We had a few hiccups with the Credit Union this year—like they changed (or enacted) rules for cashing checks, didn't get our signatures on their books until mid winter, and some other technical issues. Hopefully their new building will lead to better management.

On the plus side is the wonderful engagement of those in our community and the work that we do that reaches far beyond our smallish congregation. Our team works well together, so thanks to Jim for heading the Finance Team, Julie for being Financial Secretary and Melissa for superb booking keeping and follow through.

-Sue Wadley

Finance Team Annual Report 2023

Members: Chair - Jim D'Aloisio
Treasurer – Sue Wadley
Financial Secretary - Julia Schult
Trust Representative – Cliff Mellor
Bookkeeper - Melissa Lesley-Fox
At-Large Members - Susan King and Janet Mallan

Once again, the Finance Team proved to be a reliable and robust group! We met via Zoom most, but not all, of the 2nd Tuesday of the month at 7 PM, to discuss the financial side of First UU. Highlights of the year:

- Sue Wadley stepped up to the plate to take on the role of Treasurer. Thank you, Sue!
 - Changes in branch locations and services and occasional accounting discrepancies have made working with Co-Op Federal Credit Union a challenge, on occasion. Each time, Melissa's accurate bookkeeping proved invaluable.
 - The finances of the utility costs and reimbursement from the new vehicle charging stations took a little time and patience to straighten out. Thanks, again, to Melissa.
 - As we had hoped, engaging Jim Pompo, CPA to apply for a Federal Employees Retention Tax Credit resulted in a nice infusion of cash near the beginning of the fiscal year.
 - Susan, Julie, and Felice Killian-Benigno are re-establishing the vital Fundraising activities. Thank you!
 - We've pulled a significant amount of cash from our investments over the past few years. See below.
 - As of this writing, our budget for next year is not set, pending the final phase of our annual pledge drive. Like most congregations across the country, our finances are challenged. Stay tuned!
- Jim D'Aloisio

Pastoral Care Report

Committee Members:

Diane Case
Rev. Betsey Spaulding

Our year started on a high note in June as we congratulated Grace Irish who was Salutatorian of her high school class.

I am especially grateful several people:

Jane Pickett, who for seventh year, has assured a speaker and musician were available to provide our weekly ecumenical service at the Nottingham. Next year will be the tenth anniversary of our ecumenical presence at the Nottingham.

Peggy Flanders for providing several well received services at the Nottingham, in addition to providing innumerable rides to work, appointments and assisting two members Trish Taylor Kaye get back on her feet and move to a new apartment as well as helping Mia Rand with drives to appointments or lending her car for her move to new apartment.

Jim D'Alosio for providing rides to Rev. Betsey.

Paul Barfoot for providing rides to Rev. Betsey, as well as photographically creating and providing me with a very generous supply of cards used for our pastoral greetings and to welcome new members.

Randy Kalish for keeping the community group in touch for several years.

In July, at the request of her family, Rev. Betsey and I provided an end of life blessing for Kathleen Sobotka Manning, who died the next day. Her family provided a private service. (prior to Rev. Molly's arrival)

Close to a dozen members have had acute hospitalizations frequently followed by rehabilitation. One member has been hospitalized five or six times

In October, we provided a generous supply of nonperishable food to the Eastern Farm Workers for their emergency food supply. This February they used our building for their annual Tamale making fundraiser.

October 8th, Rev. Molly assisted Tim Rice's family with his memorial. Our sanctuary was filled to capacity with people recognizing his many years of community service.

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In November, Georgia Schneider died after a lengthy illness, her family held a private service which several of us attended. Shortly after Georgia's death, David Lytlle died at 98.

In December, we held our flower sale, and delivered flowers to thirteen members coping with illness. Eileen Taveniere helped with sales, purchasing, maintaining and finding folks to deliver the flowers and some cheer.

In April, Barbara Meldrum one of our four new members was the fifth member we lost. Her memorial is scheduled for June 3rd.

I am grateful to Rev. Molly for ongoing support. As well as to Julie Forget, our office administrator, for assuring lines of communication remain open and for providing support with weekly newsletter. Also for her capable caring manor in speaking to friends and family.

Finally, to everyone I failed to mention who reaches out to our members and friends to provide warmth. Blessings.

Respectfully Submitted,

Diane Case

Annual Report: Worship Committee

Members:

Sue Wadley Chair

Paul Barfoot Chair for 23-24

Don Marr

Peggy Flanders

Kaaren Remley

Devon Kinsman

The Worship Committee organized summer services shared with May Memorial online.

In addition, they organized 9 hybrid services from Sept. to June. The individuals in charge of each service communicated well with Emery and Tina. Rev. Molly attended our monthly meetings which was an immense help in terms of focusing our contributions with faer's and also the Soul Matters themes.

Attendance in person ranged from 20 to 40, normally in the mid to high 20s. Attendance online ranged from 9 to 25, with the mean about 15.

We truly appreciated Emery's choice of music, widening hymn selections and his prelude and postlude selections. The Irish jig on the organ was outstanding. Tina's creativity in Time for All Ages were great and aided in cohesive services, as well as her creativity in interactive ideas.

We welcome new members! Please contact Paul if you are interested.

Community Relations Committee

Members: Felice Killian-Benigno (chair), Paul Barfoot (board liaison), Karen Bowman, Michael Messina-Yauchzy, Rick Olanoff

The Congregational Relations Committee/CRC was formerly called the Ministerial Relations Committee. This year, the committee has re-assumed its former role in their capacity of working with Reverend Molly to provide a forum for discussion, reflections, suggestions and feedback as Molly worked in developing and fulfilling the skills, duties and tasks of ministry in their first year of preliminary fellowship. We have met monthly via Zoom.

The committee would like to offer special recognition of our member, Karen Bowman as she finishes her tenure on the CRC. She has been a steadfast member of the committee serving way beyond her initial term to help us transition through many changes and the COVID years. Thank you, Karen, for all of your contributions and for providing stability for this committee.

Submitted by Felice Killian-Benigno

Nominating Committee Report

Eileen Taveniere, Chair

Recommendations for the Slate of Officers and Board for 2023-24:

Nominations may be made from the floor (see Constitution, Article IX, Section 3 below)

Officers:

President: Devon Kinsman (term: 1 year, 2nd year of possible 3)

Vice President: Paul Barfoot (term: 1 year, 2nd year of possible 3)

Treasurer: Sue Wadley (Term: 1 year, 2nd year of possible 5)

Clerk: Joe Pawletko (term 1 year, 1st year of possible 5)

Financial Secretary: Julia Schult (term: 1 year, 4th year of possible 5)

Board of Trustees: New Members TO BE VOTED ON

Randy Kalish (term: 3 years, 2022-2025)

Cam Gee (term: 3 years, 2023-2026)

Coran Klaver (term: 1 year, to fill out 3 year term 2021-2024)

Nominating Committee:

Michael Messina-Yauchzy (term: 3 years, 2021-2024)

Don Marr (term: 3 years, 2021-2024)

Betsy Spaulding (term: 3 years, 2022-2025)

Peggy Flanders (term: 3 years, 2023-2026)

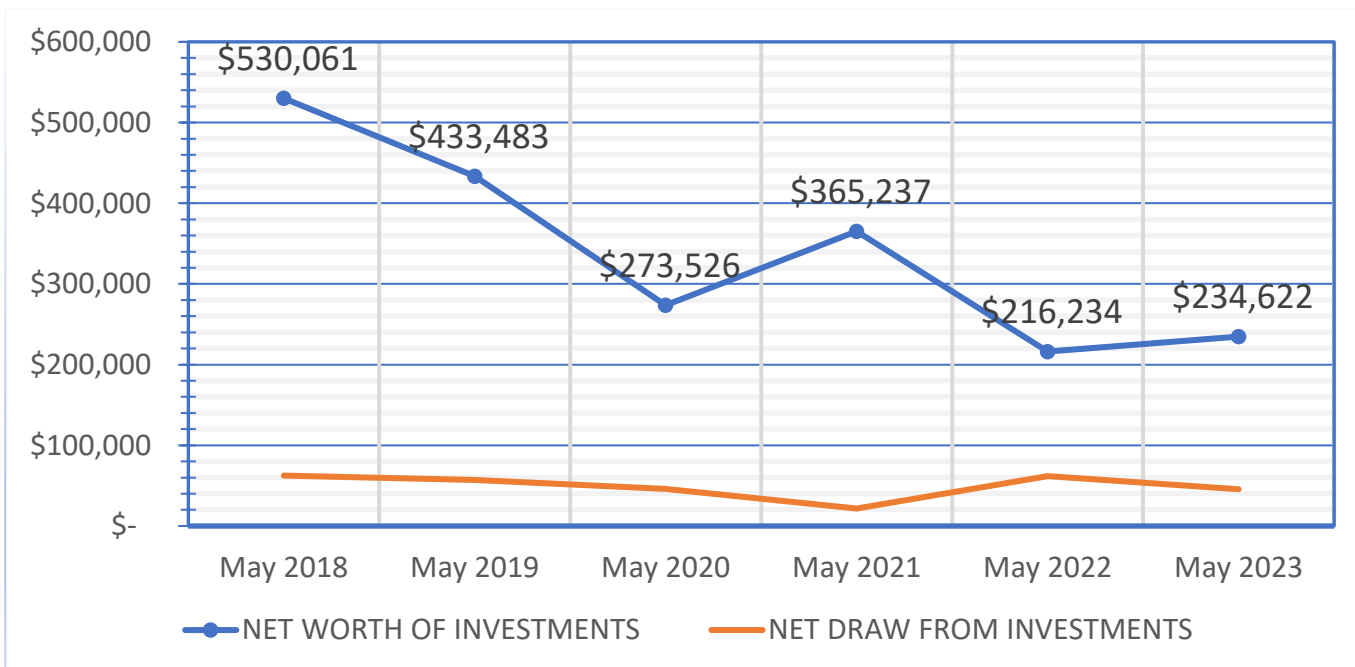
We thank Eileen Taveniere, who completed her term of office on the Nominating Committee this year.

Article IX of Constitution

Section 3) Nominations may be made from the floor, provided the person named has consented to the nomination. Nominees from the floor shall be given opportunity to present their candidacies. Should a nominee from the floor take advantage of such an opportunity, other candidates for the same office shall be offered a similar privilege.

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Investments



First Unitarian Universalist Society of Syracuse
Annual Report 2022-2023

First Unitarian Universalist Society of Syracuse
Profit & Loss Budget vs. Actual
 July 2022 through April 2023

82% through the year

Accrual Basis

	<u>Jul '22 - Apr 23</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>	<u>Notes</u>
Ordinary Income/Expense					
Income					
4100 · Contributions					
4101 · Plate Offerings	\$ 14,352	\$ 5,000	\$ 9,352	287%	
4102 · Offerings - Special	\$ 395	\$ 500	\$ (105)	79%	
4104 · Pledges/cash basis current yr					
4105 · Mid-year pledge	\$ 1,000	\$ 3,500	\$ (2,500)	29%	
4104 · Pledges/cash basis current yr - Other	\$ 68,809	\$ 100,000	\$ (31,191)	69%	
Total 4104 · Pledges/cash basis current yr	\$ 69,809	\$ 103,500	\$ (33,691)	67%	
4200 · Fundraisers					
4260 · Other	\$ 630	\$ 5,000	\$ (4,370)	13%	Trunk sale
4200 · Fundraisers - Other					
Total 4200 · Fundraisers	\$ 630	\$ 5,000	\$ (4,370)	13%	
4310 · Pledge Reserve		\$ (5,000)	\$ 5,000		
Total 4100 · Contributions	\$ 85,186	\$ 109,000	\$ (23,814)	78%	
4400 · Other Income					
4420 · Betts Estate Trust	\$ 5,623	\$ 7,500	\$ (1,877)	75%	
4440 · Miscellaneous Income	\$ 15,520	\$ 2,000	\$ 13,520	776%	\$11,582 Employee Retention Credit; \$2500 empl. matc. gift
Total 4400 · Other Income	\$ 21,143	\$ 9,500	\$ 11,643	223%	
4500 · Facility income					
4521 · Montessori	\$ 18,900	\$ 18,900		100%	
4523 · Rental Income	\$ 8,921	\$ 12,500	\$ (3,579)	71%	
Total 4500 · Facility income	\$ 27,821	\$ 31,400	\$ (3,579)	89%	
Total Income	\$ 134,150	\$ 149,900	\$ (15,750)	89%	
Gross Profit	\$ 134,150	\$ 149,900	\$ (15,750)	89%	
Expense					
6100 · Facilities					
6110 · Utilities	\$ 6,035	\$ 5,000	\$ 1,035	121%	
6111 · Waste Disposal	\$ 1,078	\$ 1,400	\$ (322)	77%	
6112 · Water	\$ 75	\$ 270	\$ (195)	28%	
6113 · Sewer District	\$ 926	\$ 1,500	\$ (574)	62%	
6121 · Lanscaping/snowplowing	\$ 4,800	\$ 7,500	\$ (2,700)	64%	
6130 · Maintenance and Repair items	\$ 3,085	\$ 2,550	\$ 535	121%	
6131 · Maintenance Contracts	\$ 1,104	\$ 3,050	\$ (1,946)	36%	
6140 · Cleaning Service	\$ 10,652	\$ 12,000	\$ (1,348)	89%	
6141 · Janitorial supplies	\$ 871	\$ 1,200	\$ (329)	73%	
Total 6100 · Facilities	\$ 28,626	\$ 34,470	\$ (5,844)	83%	
6200 · Administrative Expenses					
6209 · Admin services	\$ 1,826	\$ 1,500	\$ 326	122%	includes \$750 to CPA who filed for employee retention credit
6210 · Admin supplies	\$ 359	\$ 350	\$ 9	103%	
6211 · Postage	\$ 141	\$ 250	\$ (109)	56%	
6220 · Telecommunications	\$ 1,959	\$ 2,200	\$ (241)	89%	
6221 · Copier Lease	\$ 219	\$ 600	\$ (381)	37%	
6222 · Website Support	\$ 350	\$ 325	\$ 25	108%	
6223 · Insurance Building/liability	\$ 2,792	\$ 4,180	\$ (1,388)	67%	
6224 · Payroll Processing	\$ 1,200	\$ 1,200	\$ -	100%	\$110 unbudgeted additional "record retention fee"
6230 · Finance manager	\$ 6,375	\$ 7,534	\$ (1,159)	85%	
Total 6200 · Administrative Expenses	\$ 15,221	\$ 18,139	\$ (2,918)	84%	
6300 · Worship & Music					
6310 · Worship & Music Ministry	\$ 1,008	\$ 850	\$ 158	119%	
6321 · Accompanists & Performing	\$ 160	\$ 1,555	\$ (1,395)	10%	
6330 · Music supplies		\$ 451	\$ (451)		

6331 · Copyright Licenses		\$ 404	\$ (404)	
6332 · Organ & Piano Tuning/Repairs		\$ 620	\$ (620)	
Total 6300 · Worship & Music	\$ 1,168	\$ 3,880	\$ (2,712)	30%
6400 · Lifespan Faith Development				
6410 · Supplies & expenses	\$ 1,053	\$ 1,200	\$ (147)	88%
6420 · Teenz		\$ 300	\$ (300)	
6450 · Adult LFD		\$ 100	\$ (100)	
Total 6400 · Lifespan Faith Development	\$ 1,053	\$ 1,600	\$ (547)	66%
6500 · Community Outreach Ministry				
6520 · Interfaith Works	\$ 100	\$ 100		100%
6521 · ACTS	\$ 200	\$ 200		100%
Total 6500 · Community Outreach Ministry	\$ 300	\$ 300		100%
6600 · Congregational Care & Growth		\$ 100	\$ (100)	
6900 · Denominational affairs				
6910 · UUA Annual Program Fund	\$ 8,684	\$ 11,579	\$ (2,895)	75%
Total 6900 · Denominational affairs	\$ 8,684	\$ 11,579	\$ (2,895)	75%
6950 · Other				
6960 · Child Care	\$ 375	\$ 2,400	\$ (2,025)	16%
6970 · Line of Credit Interest Paid	\$ 6,250	\$ 12,500	\$ (6,250)	50%
Total 6950 · Other	\$ 6,625	\$ 14,900	\$ (8,275)	44%
7000 · Staff Salaries				
7010 · Minister Salary & Housing	\$ 44,445	\$ 51,846	\$ (7,401)	86%
7020 · Music Director	\$ 11,333	\$ 14,000	\$ (2,667)	81%
7030 · Director of Lifespan Faith Deve	\$ 18,129	\$ 21,425	\$ (3,296)	85%
7040 · Secretary	\$ 8,955	\$ 11,000	\$ (2,045)	81%
7055 · AV Consulting		\$ 1,000	\$ (1,000)	
Total 7000 · Staff Salaries	\$ 82,862	\$ 99,271	\$ (16,409)	83%
7100 · Staff Benefits				
7110 · Health Insurance				
7112 · Health Insurance-minister	\$ 6,828	\$ 8,125	\$ (1,297)	84%
7113 · Dental Insurance-Minister	\$ 587	\$ 720	\$ (133)	82%
7116 · Health Insurance-LFD Director	\$ 8,099	\$ 9,878	\$ (1,779)	82%
Total 7110 · Health Insurance	\$ 15,514	\$ 18,723	\$ (3,209)	83%
7130 · Pension Plan				
7132 · Pension Plan-Minister	\$ 4,784	\$ 5,581	\$ (797)	86%
7136 · Pension Plan-LFD Director	\$ 1,813	\$ 2,143	\$ (330)	85%
7138 · Pension Plan-Music Director	\$ 52			
Total 7130 · Pension Plan	\$ 6,649	\$ 7,724	\$ (1,075)	86%
7140 · Short term Disability Insurance	\$ (42)	\$ 300	\$ (342)	-14%
7150 · Workers Compensation Insurance	\$ 430	\$ 750	\$ (320)	57%
7160 · Long-term Disability	\$ 562	\$ 780	\$ (218)	72%
7165 · Life, AD&D Insurance-Minister	\$ 363	\$ 436	\$ (73)	83%
7170 · Employer Social Security				
7012 · In lieu of FICA	\$ 3,400	\$ 3,966	\$ (566)	86%
7170 · Employer Social Security - Other	\$ 2,858	\$ 3,643	\$ (785)	78%
Total 7170 · Employer Social Security	\$ 6,258	\$ 7,609	\$ (1,351)	82%
7180 · NY Paid Family Leave				
Total 7100 · Staff Benefits	\$ 29,734	\$ 36,322	\$ (6,588)	82%
7200 · Continuing Education				
7210 · Minister Prof Expense	\$ 90	\$ 2,000	\$ (1,910)	5%
7220 · Music Director		\$ 650	\$ (650)	
7230 · Director of Lifespan Faith Deve	\$ 258	\$ 1,000	\$ (742)	26%
Total 7200 · Continuing Education	\$ 348	\$ 3,650	\$ (3,302)	10%
8010 · *Reconciliation Discrepancies	\$ (1)		\$ (1)	100%
Total Expense	\$ 174,620	\$ 224,211	\$ (49,591)	78%
Net Ordinary Income	\$ (40,470)	\$ (74,311)	\$ 33,841	54%
7001 · Interest Expense	\$ 12,916		\$ 12,916	100%
9999 · UNKNOWN	\$ 869		\$ 869	100%

carry over from prev fiscal year

Air filters

First Unitarian Universalist Society of Syracuse
PROPOSED Budget

For Fiscal Year 2024 - July 2023 - June 2024

Approved by Board

5-Jun-23

	FY '22-'23 Budgeted	FY '22-'23 Through May	BUDGET PROPOSED	NOTES
Ordinary Income/Expense				
Income		This is 92%	\$ -	Amounts that we input
		of the year	\$ -	Cells that are calculated
4100 · Contributions				
4101 · Plate Offerings	\$ 5,000	\$ 14,981	\$ 12,000	Surged last year. No assurances.
4102 · Offerings - Special	\$ 500	\$ 395	\$ 500	We came close.
4104 · Pledges				
4105 · Mid-year pledges	\$ 3,500	\$ 1,000	\$ 3,500	Hoping for new members' pledges
4104 · Pledges obtained during canvass	\$ 100,000	\$ 72,429	\$ 95,000	\$94,115 received as of 4 June
Total 4104 · Pledges	\$ 103,500	\$ 73,429	\$ 98,500	
Total 4200 · Fundraisers	\$ 5,000	\$ 630	\$ 4,000	<<< Will require effort
4310 · Pledge Reserve	\$ (5,000)		\$ (4,750)	5% pledge shrinkage budgeted
Total 4100 · Contributions	\$ 109,000	\$ 89,435	\$ 110,250	
4400 · Other Income				
4420 · Betts Estate Trust	\$ 7,500	\$ 5,623	\$ 7,500	Cliff (Trust rep) confirmed OK
4440 · Miscellaneous Income	\$ 2,000	\$ 15,520	\$ 2,000	
Total 4400 · Other Income	\$ 9,500	\$ 21,143	\$ 9,500	
4500 · Facility income				
4521 · Montessori	\$ 18,900	\$ 18,900	\$ 19,800	Agreed to by Krisi - 4.76% incr.
4523 · Rental Income	\$ 12,500	\$ 8,961	\$ 12,500	<<< We need to market the space
Total 4500 · Facility income	\$ 31,400	\$ 27,861	\$ 32,300	
Total Income	\$ 149,900	\$ 138,439	\$ 152,050	
Expense				
6100 · Facilities				
6110 · Utilities	\$ 5,000	\$ 6,311	\$ 6,000	We've underestimated this
6111 · Waste Disposal	\$ 1,400	\$ 1,186	\$ 1,400	\$1296 contract + incr. cushion
6112 · Water	\$ 270	\$ 75	\$ 270	Keep the same
6113 · Sewer District	\$ 1,500	\$ 926	\$ 1,100	Varies from 1000 to around 1250
6121 · Landscaping/snowplowing	\$ 7,500	\$ 4,883	\$ 6,500	\$72/wk lawn care + plowing/salting
6130 · Maintenance and Repair items	\$ 2,550	\$ 4,107	\$ 2,500	Including air filters
6131 · Maintenance Contracts	\$ 3,050	\$ 1,104	\$ 3,050	Elevator insp & testing, fire ext.
6140 · Cleaning Service	\$ 12,000	\$ 11,849	\$ 12,000	Same as last year
6141 · Janitorial supplies	\$ 1,200	\$ 871	\$ 1,200	Keep the same
Total 6100 · Facilities	\$ 34,470	\$ 31,312	\$ 34,020	
6200 · Administrative Expenses				
6209 · Admin services	\$ 1,500	\$ 1,945	\$ 1,500	Breeze \$864 + online contrib fees. This year - \$750 extra acc't. fees
6210 · Admin supplies	\$ 350	\$ 393	\$ 400	
6211 · Postage	\$ 250	\$ 166	\$ 250	Keep the same
6220 · Telecommunications	\$ 2,200	\$ 1,959	\$ 2,616	Spectrum \$218/mo x 12
6221 · Copier Lease	\$ 600	\$ 219	\$ 300	Current usage \$280/yr
6222 · Website Support	\$ 325	\$ 392	\$ 400	Will be \$377 this year.
6223 · Insurance Building/liability	\$ 4,180	\$ 2,792	\$ 4,180	Current \$4352 - rebate (150-450)
6224 · Payroll Processing	\$ 1,200	\$ 1,284	\$ 1,400	Slight increase
6230 · Finance manager	\$ 7,534	\$ 6,954	\$ 7,760	<<< +3%
Total 6200 · Administrative Expenses	\$ 18,139	\$ 16,104	\$ 18,806	
6300 · Worship & Music				
6310 · Worship & Music Ministry	\$ 850	\$ 1,008	\$ 850	Keep the same
6321 · Accompanists & Performing	\$ 1,555	\$ 160	\$ 500	<<<
6330 · Music supplies	\$ 451		\$ 200	<<<

6331 · Copyright Licenses	\$ 404		\$ 100	<<<
6332 · Organ & Piano Tuning/Repairs	\$ 620	\$ 250	\$ 500	2 x \$250
Total 6300 · Worship & Music	\$ 3,880	\$ 1,418	\$ 2,150	
6400 · Lifespan Faith Development				
6410 · Supplies & expenses	\$ 1,200	\$ 1,169	\$ 1,500	Tina suggested \$1600
6420 · Teenz	\$ 300	\$ 310	\$ 300	from Tina
6450 · Adult LFD	\$ 100	\$ 90	\$ 100	from Tina
Total 6400 · Lifespan Faith Development	\$ 1,600	\$ 1,569	\$ 1,900	
6500 · Community Outreach Ministry				
6520 · Interfaith Works	\$ 100	\$ 100	\$ 100	Keep the same
6521 · ACTS	\$ 200	\$ 200	\$ 200	Keep the same
Total 6500 · Community Outreach Ministry	\$ 300	\$ 300	\$ 300	
6600 · Congregational Care & Growth				
6910 · UUA Annual Program Fund	\$ 11,579	\$ 11,579	\$ 4,000	No such body any more 38% of \$10,421 UUA Fair Share
Total 6900 · Denominational affairs	\$ 11,579	\$ 11,579	\$ 4,000	
6950 · Other				
6960 · Child Care	\$ 2,400	\$ 585	\$ 1,200	from Tina
6970 · Line of Credit Interest Paid	\$ 12,500	\$ 6,250	\$ 18,000	<< 8.6% interest on \$210,000
Total 6950 · Other	\$ 14,900	\$ 6,835	\$ 19,200	
7000 · Staff Salaries				
7010 · Minister Salary & Housing	\$ 51,846	\$ 48,433	\$ 53,401	50% salary, 50% housing. +3%
7020 · Music Director	\$ 14,000	\$ 12,606	\$ 14,420	<<< +3%
7030 · Director of Lifespan Faith Deve	\$ 21,425	\$ 19,777	\$ 22,068	<<< +3%
7040 Administrative Assistant Teen Advisor	\$ 11,000	\$ 9,915	\$ 11,330	<<< +3%
7055 · AV Consulting	\$ 1,000		\$ 1,000	from Tina Necessary
Total 7000 · Staff Salaries	\$ 99,271	\$ 90,731	\$ 103,219	
7100 · Staff Benefits				
7110 · Health Insurance				
7112 · Health Insurance-Minister	\$ 8,125	\$ 7,464	\$ 8,450	Current \$8268, maybe add 2%
7113 · Dental Insurance-Minister	\$ 720	\$ 643	\$ 750	Current \$728, maybe add 3%
7116 · Health Insurance-LFD Director	\$ 9,878	\$ 8,879	\$ 10,350	Current \$10,145, maybe add 2%
Total 7110 · Health Insurance	\$ 18,723	\$ 16,986	\$ 19,550	
7130 · Pension Plan				
7132 · Pension Plan-Minister	\$ 5,581	\$ 5,214	\$ 5,749	10% of compensation
7136 · Pension Plan-LFD Director	\$ 2,143	\$ 1,978	\$ 2,207	10% of compensation
Total 7130 · Pension Plan	\$ 7,724	\$ 7,192	\$ 7,955	
7140 · Short term Disability Insurance	\$ 300	\$ (42)	\$ 300	Keep same. Refund hard to est.
7150 · Workers Compensation Insurance	\$ 750	\$ 430	\$ 900	Slight increase.
7160 · Long-term Disability	\$ 780	\$ 618	\$ 750	\$720 unless rate increases
7165 · Life, AD&D Insurance-Minister	\$ 436	\$ 399	\$ 450	\$444 unless rate increases
7170 · Employer Social Security				
7012 · In lieu of FICA	\$ 3,966	\$ 3,705	\$ 4,085	7.65% x minister S+H
7170 · Employer Social Security - Other	\$ 3,643	\$ 3,144	\$ 3,704	7.65% x salaries
Total 7170 · Employer Social Security	\$ 7,609	\$ 6,849	\$ 7,789	
7180 · NY Paid Family Leave			\$ -	Deducted from staff salaries
Total 7100 · Staff Benefits	\$ 36,322	\$ 32,432	\$ 37,695	
7200 · Continuing Education				
7210 · Minister Prof Expense	\$ 2,000	\$ 90	\$ 500	<<< Way below UUA guidelines
7220 · Music Director	\$ 650		\$ 200	<<< Way below UUA guidelines
7230 · Director of Lifespan Faith Deve	\$ 1,000	\$ 969	\$ 500	<<< Way below UUA guidelines
Total 7200 · Continuing Education	\$ 3,650	\$ 1,059	\$ 1,200	
Total Expense	\$ 224,211	\$ 193,439	\$ 222,490	
Income Minus Expense	\$ (74,311)	\$ (55,000)	\$ (70,440)	<<< Amount to draw from our investments. It's a LOT.

Contracted or Purchased Work Items

	ITEM	COST	DESCRIPTION
1	Brickwork Rehabilitation	\$14,000	Limited repairs to portions of walls at rear entry and front portico
2	Fellowship Hall Heat Pump	\$6,000	To replace old furnace in furnace room. Unit to go on east side of FH
3	Sanctuary Windows	\$5,000	Limited repairs - partial replacement of some of the east windows
4	Replace / relamp FH can lights	\$1,000	CFL's have become expensive
5	Chairs for Fellowship Hall	\$500	Seating that can accommodate wider people
6	Belated spring landscaping cleanup	\$500	Mulching, pruning, etc.
	TOTAL	\$27,000	Paid for by anonymous donation

NOTES

Costs are estimates only - amounts may be shifted between items as costs are confirmed.

Jim to prepare sketch of work scope and materials and contact Lupini or RE Kelley for \$15,000 worth of work

Jim to contact CNY Heat Works, contractors
Jim to see if Hueber-Breuer knows of a willing window installer who can come up with a plan

Matt has cost options

Julie provided a website

Lawn Tech didn't do anything this spring

Work Items to be Accomplished During Work Parties

1	Prep and paint exterior wood trim & soffits, replace rotted pieces		
2	Pressure-wash rear façade elements		
3	Prep and replace/recoat parge coating on rear cement board façade panels		
4	Paint stained spline ceiling at corridor near office		
5	Clean, repair and paint sign at corner		
6	Replace / reinstall front and rear flagpoles		
7	Straighten / repair front bench		
	Total material cost	\$500	Paid for by anonymous donation

Rear entry portico, windows, front gable soffit

Gently!

Need to buy Durock coating material. Color to match?

Roof may or may not be leaking