



# Annual Report 2023-2024


*First Unitarian Society of Ithaca*

*Presented May 21, 2024*

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# Attendance Record

	Date	In Person Adults	YouTube Views	RE teachers and nursery staff	RE kids	Kids in Sanc & parlor	Kids in nursery	Minister/Speaker	Sermon Title
Sept	10-Sep-23	99	27	n/a	n/a	19	n/a	Rev. Janet Shortall, Rev. Peaches Gillette, Emily Richards	Water Communion
	17-Sep-23	88	17	5	16	0	6	Rev. Janet Shortall	Our Yearning to Belong
	24-Sep-23	73	36	8	12	1	3	Emily Richards	Our Commitment to Welcoming
Oct	1-Oct-23	58	21	n/a	n/a	10		Emily Richards	Kindling the Flame, Multi Gen service
	8-Oct-23	64	20	6	13	0	4	Anne Rhodes	The Climate Crisis: What's Spirituality Got to Do With It
	15-Oct-23	86	29	9	16	1	1	Rev. Peaches Gillette	Mutualizing our Humanness
	22-Oct-23	98	27	8	13	2	6	Jim Garbarino	My Journey to Making Sense of Broken Children
	29-Oct-23	75	21	8	20	2	3	Emily Richards	We Remember
Nov	5-Nov-23	57	30	11	15	1	3	Emily Richards	Generosity of the Spirit"
	12-Nov-23	88	45	7	14	0	5	Rev. Janet Shortall	Generosity is the Fruit of a Supple Heart"
	19-Nov-23	140	32	2	n/a (multigen)	36	3	Emilv Richards	We Give to Receive
	26-Nov-23	83	7	13	22	2	2	Rev. Peaches Gillette	Generosity, the Stage of Al Virtues"
Dec	3-Dec-23	79	26	10	14	0	1	Michael Ramos	A Living Wage Future and Beloved Community
	10-Dec-23	68	15	9	13	4	3	Karim Beers	Reflections on Bahá'í Faith and Social Activism
	17-Dec-23	107	26	0	n/a	35	0	Emily Richards	No Rehearsal Holiday Pageant
Sage Chapel	23-Dec-23	645			xxx	xxx	xxx	Sage Chapel	Candlelight service
	31-Dec-23	xxx	xxx	xxx	xxx	xxx	xxx	no service	xxx
Jan	7-Jan-24	xxx	xxx	xxx	xxx	xxx	xxx		xxx
	January 14, 2024	77	52	10	15	1	2	Emily Richards	Love is the Answer
	21-Jan-24	70	56	9	19	0	3	Branwen Drew	Never too Old
	28-Jan-24	111	50	10	21	2	7	Rev. Peaches Gillette	Liberating Love
Feb	4-Feb-24	93	14	12	21	1	6	Rev. Peaches Gillette	Justice and Equity: Nourishing One Another Through the Journey
	11-Feb-24	80	112	4	n/a (multi gen)	13	5	Crys Matthews	Songs on Why We Can't Wait
	18-Feb-24	80	21	9	15	4	3	Sara Catterall	Change Through Community
	25-Feb-24	100	32	12	23	2	1	Emily Richards	The Future is Ours to Create
March	3-Mar-24	98	24	8	23	1	6	Rev. Peaches Gillette	Transformation
	10-Mar-24	67	49	10	10	0	2	Emily Richards	Opening Up to Change

	17-Mar-24	87	36	3	n/a (multi gen)	12	1	Emily Richards	The Joy of Transformation
	24-Mar-24	96	17	10		12	2	Rev. Peaches Gillette	Transformation
	31-Mar-24	101	22	7		13	4	Magdalen Lindeberg	Death and Renewal
<b>April</b>									
	7-Apr-24	74	20	11		18	0	Rev. Peaches Gillette	Independence and Community-Striking the Balance
	14-Apr-24	72	27	10		21	0	Emily Richards	We Belong to Each Other
	21-Apr-24	92	29	19		4	1	4 Rev. Janet Shortall	From What Understanding of the World is YOUR Life Lived
	28-Apr-24	107	19	2	n/a (multi gen)		12	5 Emily Richards	Songs of the Earth
<b>May</b>	5-May-24	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
	12-May-24	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
	19-May-24	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD
	26-May-24	TBD	TBD	TBD	TBD	TBD	TBD	TBD	TBD

## The 7 Principles of Unitarian Universalism

**1st Principle:** The inherent worth and dignity of every person.

**2nd Principle:** Justice, equity and compassion in human relations.

**3rd Principle:** Acceptance of one another and encouragement to spiritual growth in our congregation.

**4th Principle:** A free and responsible search for truth and meaning.

**5th Principle:** The right of conscience and the use of the democratic process within our congregation and in society at large.

**6th Principle:** The goal of world community with peace, liberty, and justice for all.

**7th Principle:** Respect for the interdependent web of all existence of which we are a part.

*And the 8th Principle which was adopted by First Unitarian Society of Ithaca at it's Annual Meeting in May, 2022:*

**8th Principle:** To affirm and promote 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.



# Minutes of Annual Meeting, May 24, 2023

Abbreviated notes are below. For the complete version, please use this link:

<https://tinyurl.com/AnnualMeetingMinutes2023>

*Board President Don Barber called the annual meeting of the First Unitarian Society of Ithaca to order at 6:09 pm on May 24, 2023.*

*Scribe: Valerie Graves/Parliamentarian: Don Barber/Quorum: **50 members present** (37 in-person, 13 virtual)*

Handouts: [Annual Report 2022-2023 .pdf](#), [Parliamentary Procedure.pdf](#), [22-23 Annual Meeting agenda.docx.pdf](#), [Treasurer's Annual Report, 2023.docx](#), [Proposed Budget for Annual Meeting.xlsx](#), [2023 Annual Meeting BoT Candidates](#)

The meeting began with opening words of welcome and chalice lighting by Director of Religious Education (DRE), Emily Richards.

## **Item #1: Year in Review Presentation by DRE Emily Richards**

This was a year of growth, trying new things, building connection and working with change. Some highlights of the year were:

We have had a full year of in-person services, with a steady increase in participation; hospitality teams are running again; the auction was successful and raised \$7500; there is a new social justice leadership team; the antiracism team hosted two “living the pledge” workshops; religious exploration has returned to regular Sunday programming; there were two sessions of OWL; the church hired an RE assistant - Madeline Natale; adult RE team has offered diverse morning lectures and workshops; we have a new choir director Jayne Demakos; Stephanie Ortolano, music director, started a concert series: Beacon on Aurora; small group ministry continues and two new small groups are being formed; we have a dedicated care team that provides hands on and spiritual care; the library team cataloged 800 books and created an online catalog; the stewardship team raised \$310,000; the buildings and grounds team has taken care of many maintenance projects and will be working to replace the tile in the annex; Babies First served a record number of families this year; FUSIT Returned to Sage Chapel and held a Christmas Eve service for over 500 members of the Ithaca community.

## **Item #2: Year in Review Presentation by President Don Barber**

Don Barber gave a balcony view of where we have been and where we are headed:

The congregation has had successive years of transitions since the time when Reverend Margaret left, and through Rev Tony's short stay with us leaving us without a minister. Guidance from the UUA was that there were very few ministers available, so the Board developed an adapted partnership governance (PG) model that could be in place with or without a minister present, that played on the strengths of the congregation, which is its members. The Ministry Visioning Team (MVT) and the Operations and Administrative Team (OAT), were formed. The Staff came together to support each other and helped with transition to in-person services; and the celebrations team created services that people wanted to return to. This has been the first year with the new PG model, and in general, things went well.

The congregation also transitioned to a new model of ministry leadership after the Ministry Fulfillment Committee (MFC) recommended Peaches Gillette, Janet Shortall, and Emily Richards to share the responsibilities of ministering to the congregation.

## **Item #3: Overview of Hybrid Meeting and Parliamentary Procedure**

**Item #4: 2021 Annual Meeting Minutes. MOTION:** Approved the minutes from the 2022 Annual Meeting.

## **Item #5: 2022-2023 FUSIT Budget**

Walt Peck presented the budget for the 2023-2024 church year:

- The church is thriving and we want to continue to support that thriving; a budget was written, but then it was clear we would be short of the pledge goal despite all the work of the stewardship team meaning a deficit of around \$25,000.
- We are making up for the deficit in many ways, including: a one time cash carry over of money left from when Rev. Tony resigned; plans to brainstorm and research ways to monetize the facility through short and long term rentals; another line item income increase is for new fundraisers, such as the cabaret that the church held in the past.

**MOTION:** That the Proposed 2023-2024 Budget be adopted with spending of \$442,461 was passed.

## **Item #6: Candidate Slates for the Board of Trustees and Nominating Committee**

Fred Balfour presented a brief explanation of the role of the Nominating Committee (NomComm). NomComm is submitting four names for board, which will leave the Board with seven members and two vacancies on Board. There were no names shared for NomComm, which will have # vacancies. The candidates for the Board of Trustees were introduced and votes were tallied. Results: All candidates were elected. 45 votes for Megan McCormick (3-yr Board term), 45 votes for Fred Balfour (3-yr Board term), 45 votes for Tom Coakley (2-yr Board term), and 45 votes for Rene Rogers (2-yr Board term).

## **Item #7: Renewal of LGBTQ+ Welcoming Congregation Resolution**

Kevin Moss began by reading from the First Unitarian website about being a LGBTQ+ welcoming community. FUSIT became a welcoming congregation in the year 2000. The UUA asks us to renew every five years but we have never renewed this resolution. The UUA asks us to renew every five years but we have never renewed this resolution.

**MOTION:** We, the First Unitarian Society of Ithaca, agree to renew the LGBTQ+ welcoming congregation by undertaking the 5 practices of welcoming renewal in the 2023-2024 church year was passed.

## **Item #8: Closing Words**

Emily Richards read a passage and extinguished the chalice. Meeting adjourned at 7:29pm.

## Board of Trustees Report

### Our Governance Model

Nine years ago, Dick Cogger and others were leading work groups to consider updating our 159-year-old FUSIT to a “Partnership Governance” model. Last year’s Annual Report detailed that we were well along in the implementation. Staying within the framework of our 104-year-old Bylaws, we defined a governance “partnership” where the Board delegates authority to Committees and Teams to manage church operations and programs. What does the Board do, you ask? We spend 12 meetings and many in-between hours:

- Discerning mission
- Establishing plans
- Setting goals
- Monitoring programs/activities
- Establishing partners
- Holding itself and leaders accountable

### Work Product Production

Our Bylaws and our Board Policy Book define 17 Work Products. Major activities this year include:

- Board Policy Book: amended and expanded (December, 2023)
- Employee Handbook: amended and expanded (June, 2024)
- Fall and Winter Open Questions
- Creation of 2024-25 Vision of Ministry
- Transparency improvement through publishing monthly “Sense of the Board Meeting”
- Reestablishing the assignment of “Spokesperson for the Board”

### Goals for Next Year

The governing documents call for four long-term items that we will focus on in the near term.

- Five Year Strategic Plan for Finance
- Five-Year Strategic Plan for ministry and strategic choices.
- Planning and implementing an internal audit once every three years by an appointed internal committee.
- Planning and budgeting for an audit performed by an outside firm every 10 years.

*Fred Balfour, Board President*

The  
Board of  
Trustees meets on the  
third Tuesday of the  
month.

## Open Questions

Each year, the Board engages the congregation in a series of Open Questions. This year the Board proposed two open questions to the congregation in an effort to ensure the work of the church is in line with the needs of the community, and to help inform the decisions and the vision for the future.

The fall Open Question was: ***What types of opportunities for involvement bring you a sense of meaning and purpose, and what barriers exist to you becoming more deeply involved?***

For the first part of the question, of the 70 answers received, the majority of respondents felt that activities with others, such as small group ministry, social events, and partnerships with the greater community were a source of meaning and purpose. Many people shared their desire to connect with others. In response to the second part of the question, time limitations were overwhelmingly the barrier to increased involvement.

The winter Open Question was: ***How could FUSIT evolve and transform to continue to meet the needs of the community and also prepare for the future?***

There were 96 responses to the winter Open Question and the theme of community building was present again with many people offering changes to our spiritual programming to be more inclusive and collaborative with other area organizations. Many people also expressed the need for opportunities to meet and get to know others through events, service, and social justice projects.

In response to all the information, the Board has worked this year and made plans for future years, to support the many service projects, social events, and Ministry efforts to provide meaningful ways for our community members to be engaged and find purpose!

*Valerie Graves, Board Clerk*

## Governance Committee

This year GovCo finished making recommendations for modifying the Board Policy Book language with the new partnering of Teams MVT and OAT. An amended Board Policy Book was adopted by the Board in January.

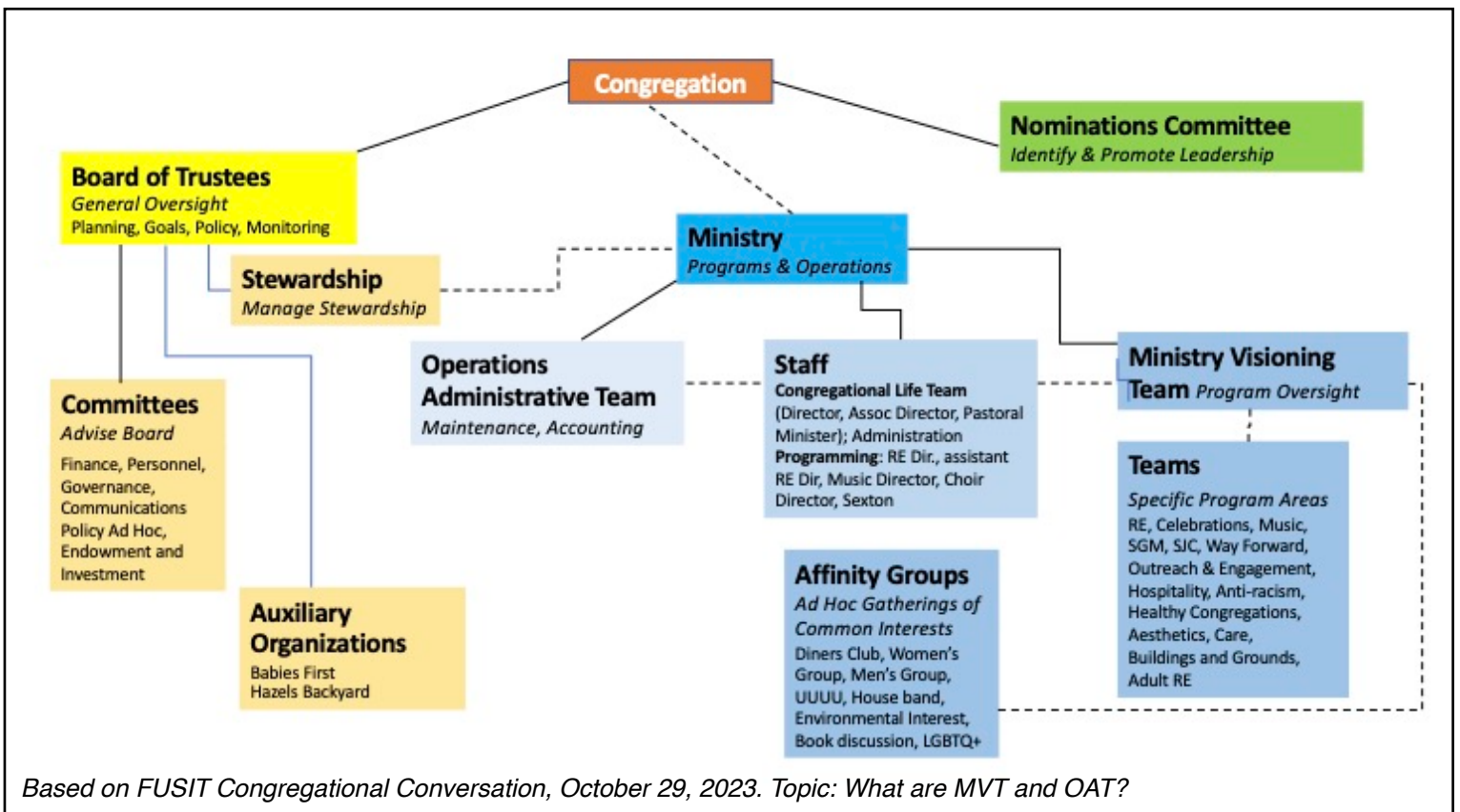
The Board has asked GovCo to review all policies, not in the Board Policy Book, and report back any recommended changes. This activity will spill over into next year.

The Board has also asked GovCo to assess what is working well and what could use further attention or modification with our current MVT, OAT, Staff, and Board governance model. GovCo anticipates making this report to the Board in June.

*Submitted by Don Barber*

# Board of Trustees Terms of Service and Organizational Chart

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
Slot # 1	Hare, Matt	Barber, Don <small>President</small>	Barber, Don <small>President</small>	Barber, Don	Don Barber <small>(On May 2024 Ballot)</small>		
Slot # 2	Turner, Andy <small>President</small>	Graves, Valerie	Graves, Valerie <small>Clerk</small>	Graves, Valerie <small>Clerk</small>	Wren Tuatha <small>(On May 2024 Ballot)</small>		
Slot # 3	Wilkinson, Kim	Nichols, Margaret	Nichols, Margaret	Nichols, Margaret <small>Vice President</small>	Open for Nominations <small>from the floor.</small>		
Slot # 4	T. O'Connor	T. O'Connor <small>Vice President</small>	T. O'Connor <small>Vice President</small>	Megan McCormick	Megan McCormick	Megan McCormick	
Slot # 5	Catterall, Simon	Catterall, S. <small>(Retired early)</small>	Dick Kurtz	Fred Balfour <small>President</small>	Fred Balfour	Fred Balfour	
Slot # 6	Hess, Carsten <small>(Retired Early)</small>	Miller, Nancy	Miller, Nancy	Wren Tuatha <small>Mid-Year Appointment</small>	Open for Nominations <small>from the floor.</small>		
Slot # 7	Stack, Lyn <small>(retired early)</small>	Gaines, John	Rene Rogers <small>(partial year: Feb-June)</small>	Rene Rogers	Rene Rogers		
Slot # 8	Hall, Elton	Hall, Elton	Fred Balfour <small>(Partial Year: Mar-June)</small>	Tom Coakley	Tom Coakley		
Slot # 9	Nier, Diana <small>Clerk</small>	Nier, Diana <small>Clerk</small>	Empty	Empty	Open for Nominations <small>from the floor.</small>		
ExOfficio Treasurer	Streid-Mullen, <small>Treasurer</small>	Peck, Walt, <small>Treasurer</small>	Peck, Walt, <small>Treasurer</small>	Peck, Walt <small>Treasurer</small>	Treasurer <small>To be Elected in July</small>		
ExOfficio Staff			Peaches Gillette Emily Richards	Emily Richards	MVT Member		
<b>Bylaws: First Unitarian Society of Ithaca</b>							
Section 1. There shall be nine elected trustees							
Section 2. No person may serve more than six consecutive years on the Board.							
After 12 months off the Board, person is eligible to run again.							





## Congregation Administration

The 23-24 Church year continued with Rachel Seymour as our Sexton, Loretta Heimbuch as our Administrative Assistant and Michelle Waffner as our Administrator. Administration highlights from this church year are below.

- A full review and update of the Employee Handbook was completed including the addition of the Ministry Visioning Team and Operations Administration Team, a review of all state laws, federal laws, and employee benefit plan requirements.
  - In light of recent thefts, security cameras were researched and installed.
  - Emergency contact information was added to the Breeze database for over 100 people. This information can be accessed by staff in the event of an emergency.
  - Details about congregant involvement, volunteering, etc. has been added to Breeze to help us maintain long term records.
  - Completed a database review and update. Current data as of May 1, 2024 is listed below:
    - Member: 263
    - Congregant: 178
    - Visitor: 106
  - Created a Breeze how to document to help people better understand how to use this resource. For basic information about how to use Breeze [Click here](#)
    - Six people joined FUSIT as members this year.
    - Thirty-six people filled out newcomer cards (and were added to the Weekly Announce list and to Breeze).
    - The building was used an average of 75 times a month for Sunday services, events, Religious Exploration, music concerts and outside rentals. An average of 37 of these uses were for non-FUSIT groups.
    - On average we welcomed 104 people each week to Sunday services and an average of 34 people viewed the service on YouTube weekly.
    - See the full attendance report for the 2023-24 church year on pages 3 and 4 of this Annual Report.

We would like to honor the passing of our fellow congregants: Dilmeran Akgoze, Martha Ferger, Jim Murphy, Margaret Moschak, Fran Helmstadter, Micheline Contiguglia, Amelia Habicht, Veasna Howe Pedersen and Anna Merson. We are grateful for their time with FUSIT and will carry them in our hearts.

*Michelle Waffner, Director of Congregation Administration*

## 8th Principle Action Ministry

The Antiracism Ministry Team transitioned this year in name only to the 8th Principle Action Ministry (8PAM) in order to be more inclusive. The 8th Principle calls out marginalized populations in addition to POC, such as LGBTQ+ who are being targeted in many ways through legislation and discriminatory acts. The goal remains the same to continue educational efforts so that as a congregation we “accountably dismantle racism and other oppressions in ourselves and our institutions.” The following are activities that were offered:

### **Book Discussions**

- In October The Office of Historical Corrections was discussed with Jackie Jablonski leading. The title novella focuses on moments and relationships in the characters’ lives in a way that allows them to speak to larger issues of race, culture, and history.
- In the first four months of 2024, specific chapters of Authentic Selves: Celebrating Trans and Nonbinary People and Their Families were presented and discussed in partnership with the LGBTQ+ Welcoming Community renewal committee.

### **Film Showing and Discussions**

- A film, The Good Mind, was offered in November for National American Indian Heritage Month. Sara Catterall led the discussion. She also organized a presentation with her father on an initiative he is working on for reparations of Native populations in Minnesota.
- Rev. Peaches Gillette will be working with the chaplains at local prisons to obtain the names of individuals who wish to receive letters. Once we obtain a list, we’ll put the call out for FUSIT volunteers, have a meeting to discuss the guidelines, and start writing.
- Reclaim Our Vote is a grassroots campaign that focuses on increasing BIPOC voter turnout through post-carding, texting, and phone banking. Nick Garin organized a postcard writing project at FUSIT on April 7 and April 28. There have been over 150 postcards written so far.

- Matt Franke-Singer is helping SURJ in their campaign to ensure that the people elected to the Ithaca School Board are committed to diversity and willing to fight racism. He is providing interested FUSIT members (20 requests) in the school district with information about the attitudes of the candidates as the time for voting gets closer.

Throughout our meetings, we regularly call attention to various community organizations and their needs in order to offer assistance and provide volunteer opportunities for FUSIT members.

*Submitted by joAnn kowalski*



## Aesthetics Team

The Aesthetics Team composed of Magdalen Lindeberg, Dawn Grover, and Laura Free engaged in several activities this year.

**Sanctuary Displays:** Using a combination of recycled materials from past years and new creations, several displays were rotated through the sanctuary, with the goal of aligning visual elements with the monthly themes. Shown in the picture at left is a WELCOME sign that Dawn Grover coordinated as a group project at Unirondack. The hand cutouts below are intended to underscore the April theme of INTERDEPENDENCE.



**Consultation on Annex colors:** Painting and flooring of the Annex were coordinated by MaryPaul Kirkpatrick and Sara Catterall. Aesthetics Team provided input on the colors of the floor tiles and suggestions for the blue accent wall. Materials have been purchased for fabric-covered foam boards that will serve to both add warmth and color to the space as well as providing some acoustic buffer.

### Art in the Parlor:

Aesthetics was asked for potential contributions to the parlor decor for the recent Cabaret Night. While others created a beautiful, warm environment with table decorations and lighting, Magdalen asked around for contributors to an Art in the Parlor show to perk up the bare walls, resulting in multiple pieces contributed by both herself and photographer Frank Muller. The show was included in Ithaca's May First Friday Art Walk, inviting the public to visit our space to see art in addition to the many other musical and religious offerings.

## Adult Religious Exploration

*(Preston Wilson, team leader; Peggy McKernan, Mary Paul Kirkpatrick)*

As of May 1, 2024, The Adult Religious Explorations (ARE) team has sponsored and moderated thirteen presentations. The total number of attendees, not counting the two scheduled later in May, was 174 with an average of 16 per session. The ARE team would like to thank all who contributed to making this year a success in regard to speakers and those who attended.

October 1: **Don Barber** presented a video on Netflix's "The Blue Zones". (The three remaining episodes were shown by Don in the spring.)

October 15: **Regi Teasley** spoke on flood preparedness in Tompkins County.

November 5: **Marie McRae** spoke on the excessive use and disposal of plastics in our society.

December 3: **Jonathan Lunine** presented a slide show on new discoveries in our solar system.

January 21: **Rev. Peaches Gillette and Tony Beer** presented a program on poetry and watercolors inspired by rural farm life in Tompkins County.

February 4: **Dick Kurtz** presented a slide show on his construction work in Poland assisting Ukraine with the international aid group, "All Hands and Hearts."

February 18: **Elisa Keeler and Aria Dawn** led us in the joy of singing.

March 3: **Jim Garbarino** spoke on the trauma inflicted on children by warfare.

March 17: **Marie McRae and Anne Rhodes** spoke on the Ithaca New Deal and energy conservation practices.

April 7: **Cortney Johnson** spoke on the nomenclature surrounding LGBTQ+ identifications.

April 21: **Nick Garin** spoke of his life growing up and his spiritual journeys.

May 5: **Stephanie D'Amico** will speak on the illnesses of Alzheimer's and dementia.

May 19: **Leslyn McBean-Claiborne** of GIAC will speak on Black Women's Mental Health.

*Submitted by Preston Wilson*

# Babies First Loan Program

*Sue Rakow, Walt and Barb Peck (Coordinators), Pat Gaines (Supplier) and Jane Koestler (Supplier and volunteer)*

Our Babies First Program is a church sponsored community outreach program now in its 3rd decade. The program supplies infant and toddler equipment to low-income families in Tompkins County. We receive requests for these articles through Tompkins County Social Service agencies and also from individual families who contact us directly.

We continued our connection with the Zeta Phi Beta Sorority -So Fly Xi Phi Chapter of Cornell University for their 2nd Annual Baby Shower Drive to benefit Babies First. We received a carload of brand new baby equipment from very enthusiastic sorority sisters and we are so grateful.

Babies First is supported through the generosity of our congregation by way of individual donations, the annual Christmas Eve offering and we also receive a generous grant from the Presbyterian Church's Wiggan's fund.

This year we saw an increase in need for car seats from our community. From September 2021-September 22 we gave out 70 car seats. From September 2022-September 23 we gave out 130. In order to meet the community need, we applied for a grant from the Community Foundation and received it for the amount of \$6,000. We have also applied for a grant from the office of Anna Kelles, our District 124 Assemblywoman. The outcome is pending.

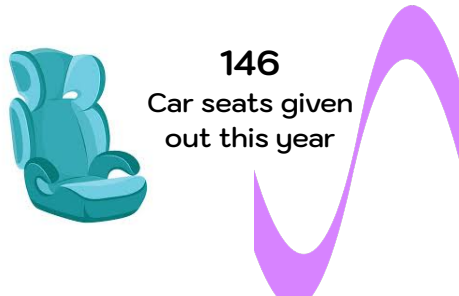
Our sources of income are:

Christmas Eve: \$3,218.78

Wiggan's Fund: \$1,100

- Our starting balance was \$4,587.94
- The income for the 2023-2024 church year (4/30/23 to 4/30/24) was \$15,777.34
- Our expenditures were \$11,278.08
- Current balance of \$9,087

Distributed Equipment	2014	2015	2016	2017	2018	2019 to 4/30	2019-2020	2020-2021
Car Seats	12	37	60	72	72	27	56	36
Pac 'n Plays	13	24	36	31	35	19	17	9
Strollers	8	9	31	33	24	8	18	10
High chairs	2	7	22	23	13	5	13	7



**146**  
Car seats given out this year

Distributed Equipment	2021-2022	2022-2023	2023-2024				
Car seats	58	88	146				
Pac'n'play	9	24	42				
Strollers	14	31	29				
High Chairs	8	15	14				

*Respectfully,  
Sue Rakow, Walt and Barb Peck, Pat Gaines and Jane Koestler*

Other: Baby Gates, Baby Carriers, Potty Chairs, Bouncy chairs, Swings, Activity Centers, linens, etc.

## Buildings and Grounds

We gained three new volunteers this year, and have had better attendance at work days, which is very encouraging! We still need more people with strong backs and knees and arms to deal with many tasks, and people who are willing to climb tall ladders! Carpentry skills are always welcome too.

This year, Buildings and Grounds oversaw the installation of a new pollinator garden in front of the Parish House, a project headed up by Madonna Stallman and Judy Jones, and with help from about eight volunteers. Coming up and growing well this spring!

In the annex, MaryPaul Kirkpatrick headed up the removal of old tile and cleaning and replacement of the baseboards by volunteers, and directed the installation of a new floor, which came in under budget. Sara Catterall organized volunteers to repaint the annex with colors chosen by Aesthetics.

The Parish House basement flooded with sewage due to a line blockage of wipes and other things that should not be flushed down our toilets, resulting in about \$2000 worth of damage. Cleaners were hired, and Dick Kurtz headed up the volunteer bathroom and wall repairs.

We have been involved in discussions and other efforts to evaluate options for renting our buildings, for improving our energy efficiency with heat pump installations, and with the safety team, including the installation of cameras around our entrances.

The painting of the Parish House by Bumblebee, and some ADA compliance projects should be happening this summer.

The trees on Aurora have been removed by the city in preparation for a major sidewalk reconstruction project this summer. They will plant new less damaging trees in the fall.





## Cabaret Event

The Cabaret Event was a successful community-building event and fundraiser that raised \$1,862 for the Society. The parlor was converted into a setting reminiscent of a cozy dinner and entertainment establishment with soft lighting and festive decor. Due to fire code limits seating in the parlor was limited to 48 but we were able to seat a few extras by expanding a bit into the sanctuary. Three individual acts entertained with a half hour set each while guests enjoyed a three course meal. The event was full to capacity and received very positive reviews from attendees.

The planning committee consisted of Rene Rogers, Sue Roenke, Don Barber, Sara Caterall, and Loretta Heimbuch. Planning meetings were held weekly via Zoom.

Reservations with entree preferences were made online and in person after services. Color-coded tickets indicating entree preference were distributed, aiding food service. Volunteers brought desserts. Salads were prepped in the kitchen and served early, entrees prepared ahead of time and served from the kitchen via waitstaff. Musicians performed in front of the fireplace, drinks and desserts set on long tables adjacent to the kitchen. Decorations, including lighting and tables seating 4-6 (tabletops made by Dick Kurtz) set the right ambiance.

Many people were involved in this successful event:

Set-up team: John Vandenberg and Alice Churchull, Don Barber and Rita Rosenberg, Sue Roenke, and Loretta Heimbuch.

Waitstaff: Marie Benedetti, Andrew and Suzanne Quagliata, Maria Prentiss, Margaret Nichols, and Dawn Grover; plus bartenders Scott Grover and Matt Hare.

Musicians: Valerie and Lloyd Graves, Tim Ball, Kevin Moss, Jack Zinda, Bob Melfi, with Jack Roscoe, MC

Chefs: Keith Perry supplied the bread, Sue Rakow made the salad, Sara Caterall prepared the side dishes, Loretta Heimbuch brought the popular Tagine, Sue Roenke did the chicken dish and Rene made the fish stew.

Clean-up crew: Scott and Dawn Grover, Fred Balfour, Don and Rita Barber

Recommendations from the Planning Committee for future Cabaret Events included:

- dropping the 3-course meal idea and going with a buffet of finger foods and desserts,
- waiting to plate until just before food service and plating assembly-line style,
- state clearly what number of seats are available due to fire code,
- the small kitchen was overly crowded and mildly chaotic at times. Suggestion to expand the Annex kitchen and supplement it with extra counter space for large event prepping,
- posting the time schedule in the kitchen, handing copies to the musicians and MC helped the evening flow smoothly.

*Respectfully submitted by Rene Rogers*



## Care Team

The Care Team acts on behalf of the congregation, and by the congregation, to provide pastoral care, and support for members and friends

of the congregation who are going through challenging times.

The Care Team goal is to provide various kinds of short term or infrequent support. When volunteers were available we provided meals and rides to appointments. Friendly phone calls, cards and visits were made for those that were isolated, ill or recovering from illness. For those who need referrals for health care, mental health or eldercare, we have lists of resources and members with some experiences with these Community resources. Easter flowers and Christmas poinsettias were delivered to our older elderly or ill church members. Members were invited to order a plant in honor or memory of family, friends, or church members. Nancy Dolge and Rita Rosenberg co-lead memorial receptions.

The Care Team had a table in the parlor after Sunday services, to answer questions or help with various needs. Kathy Hopkins has been the contact person for those members or friends of FUSIT needing assistance. Emergency pastoral care is referred to Rev. Janet Shortall. Core team members included Kathy Hopkins, Jackie Jablonski, Nancy Dolge, Nancy Miller, Rita Rosenberg, Walt Peck, Madonna Stallmann, Carolyn Emerick, Loretta Heimbuch and Janet Shortall. We are looking into expanding the number of volunteers on this team.

Memorial Receptions from July 1, 2023 - May 7, 2024

- 5 Receptions at the church
- 1 consultation with someone we were unable to accommodate at the church- 1 hr.
- 650 people in attendance total
- 61 volunteers (This figure is based on the total for each reception. Some volunteers helped at several receptions. Some helped for 2-5 hours)
- Planning Time- 2-3 hours/reception

Human Needs Fund from July 1, 2023 to May 7, 2024

- 3 recipients for a total of \$1,540
- 1 recent consultation- the potential recipient found out they had insurance to cover it.
- Raised \$1,833.50 on 2/1/24 for a current balance of \$4,488.50

**5**

**Memorial Receptions  
were held at the church**



## Celebrations Team

The Celebrations Team is composed of Magdalen Lindeberg, Jens Wennberg, Preston Wilson, Kimari Johnson, Sue Roenke, and Amber Markus, in addition to members of our ministry team (Emily Richards, Rev Peaches Gillette, Rev. Janet Shortall), and periodic contributions from other congregants.

### **Sunday Celebrations**

We are on track to have held 38 Sunday Celebrations with 29 of these led by members of our wonderful three-member ministry team and nine by laypersons. Our Soul Matters themes continue to be a valuable organizing tool for shaping elements of our services and the thematic arc over the course of each month. Themes for this past church year were: Welcome (September), Heritage (October), Generosity (November), Mystery (December), Liberating Love (January), Justice & Equity (February), Transformation (March), Interdependence (April), Pluralism (May), and Renewal (June)

### **Monthly meetings**

The Celebrations Team meets on the first Tuesday of the month by zoom, immediately following the Team Leader Council meeting. Meetings are used to review recent services, plan the Celebration Associate schedule and any openings for lay speakers, and discuss elements of the service in need of improvement or reimagining.

### **Refinement of service elements**

- In response to hearing difficulties, speakers now arrive early and work with the sound technicians so that the audio system can be calibrated to the different volumes and timbres speaker voices.

- Matters of Our Lives: This service element was reintroduced as a more regular element of the services as a way of hearing more diverse voices. Twelve have been included over the course of the church year.

- Joys & Sorrows continues to be discussed with the Joys & Sorrows team and small edits have been made to the text to better accommodate the range of comfort with calling names out loud.

- We continue to experiment with service closure in order to more clearly close the service. Having the Celebration Associate conclude the postlude with an invitation to join us in the parlor for coffee and assertively open the parlor doors has been well received.

*Submitted by Magdalen Lindeberg*

## Community-Wide Online Auction

Thanks to all those who generously donated items and those who bid on them, we had a very successful 3-day Online Auction on April 26, 27, 28, 2024. This was a great outreach event and major fundraiser, connecting FUSIT with the wider Ithaca community. Kudos to auction leader, Marie Benedetti and her team of assistants, we should write "Kudos to the auction team of Marie Benedetti, Simon Catterall and Alice Churchill.

- Bidding Owl Proceeds: \$10,112, far exceeding our \$8000 goal.
- Number of bidders increased to 125.
- Once again, over 70 local vendors participating.
- Number of auction items: 220

## Diners' Club

Diners' Club is an adult social group, which provides a way for church members and friends to get to know each other better while eating delicious food. This year, members attended five dinners; there were two whole group events and three small dish-to-pass dinners between December and June. The small group dinners were held in members' homes with each participant bringing part of the meal. There were 30 members and friends who participated in the dinners during this second transitional year. Sadly, former coordinator, Amelia Habicht, died in January after an accident. The Diners' Club group appreciates her efforts in restarting the club in the fall of 2022 and guiding it until her untimely death.

*Submitted by Jane Koestler, Diners' Club Coordinator, January-June 2024*

## Engagement and Outreach

The Ministry Visioning Team (MVT) hired Miranda Bianchi as the Engagement and Outreach Coordinator for the 2023-2024 year.

After being with us for several months Miranda left to pursue other opportunities. The decision was made not to re-hire for the position mid-year so MVT created a schedule of volunteers to be present at the Welcome Table on Sunday mornings. Childcare Coordinator Melissa Heslop took over social media for the remainder of the year in the absence of an Engagement and Outreach Coordinator.

*Submitted by Emily Richards, CRE*

## Hazel's Back Yard

Hazel's Back Yard is a place of natural beauty owned by The First Unitarian Society of Ithaca. It was deeded to us by Hazel M. Hauck in 1964, an active member in the Society. The Back Yard is a sacred trust and there are certain policies in place to maintain it as a natural area. Members and friends of First Unitarian Society of Ithaca can visit the site as a place of quiet contemplation and can have their own cremated remains, and those of loved ones, placed at this spot. It is located on Twin Glens Road, a public road off of Cayuga Heights Road in the Village of Lansing. The following names were added this year: Gilbert Levine, 1927-2024; Ilma Stein Levine, 1929-2024; David Sidney Levine, 1953-1973; Elisabeth M. Thorn, 1930-2023.

The Committee is always looking for help to decide how to maintain the property and to actually do the work needed. If you would like to volunteer you may call the church office at 607-273-7521 (ext. 21) or email [office@uuiithaca.org](mailto:office@uuiithaca.org).

## Environmental Interest Circle

The Environmental Interest Circle (EIC) has taken the past year to re-establish itself and develop some rhythms for honoring the 7th Principle: that we value and care for the web of life that connects us all.

We have engaged in many projects, while holding the theme that each of us please continue to take steps to address and re-evaluate our behaviors with respect to:

- all aspects of our resources use
- our relations with the land and all other beings
- and our impacts on future generations.



We also recognize that these requests can be overwhelming. Thus, **we ask that congregants join us in congregational presentations**, ie Matters of Our Lives, Adult RE and Social Justice Coffee Circle Events, **as well as with organization wide projects**, ie contracting to install heat pumps and more.

**EIC is also active with outreach events**, ie Earth Day Celebrations on the Commons, coordination with other local climate activists, etc. We ultimately hope to offer models of how we can work in coordination as a congregation to collectively impact our futures while we take steps together.

We recognize we could do more and would like to do so. Many proposals and discussions of different recycling, composting, plastics use, justice impacts and other initiatives could be enacted if we had more engagement and volunteers. **Please join us, the first Wednesdays of the month at 7pm via Zoom or in person at FUSIT. All are welcome!**

*Submitted by Matt Franke-Singer*

## Hospitality Teams

### ***Our Wonderful Staff: 2023-2024***

- Fred Balfour: Chair
- Cheryl Botts: Team #3
- Mike Daniels: Team #4
- Andy Turner: Team #2
- Jack Zinda: Team #1
- Pat & George Hinkle: Summer Team
- 50 regulars that “always” signed up
- Recruits that “signed up” on Sunday
- 100s of folks that brought snacks



### ***Accomplishments For The Year***

- Coffee prep and clean up: 39 regular weeks and 10 weeks of summer service.
- Serving: 2,200 cups of coffee, 250 cups of tea and 390 plates of delicious snacks.
- Washing Up: 5,000 cups and plates, plus coffee urns.
- Ushering: 2,000 people greeted and handed a Sunday Bulletin.
- Snacks: Preparing and serving many delicious snacks each week.
- Collections: \$13,000 in funds to share with ourselves and other nonprofits.
- Assisting: With several memorial services and three all-church lunches.

### ***Challenge for Next Year***

Test an “HT pledge campaign”. Congregants pledge to volunteer 3 Sundays a year.

*Submitted by Fred Balfour*

## LGBTQ+ Group

The Small Group Ministry (SGM) for the FUSIT LGBTQ+ community was formed in March of 2020 with twelve people attending and with Kevin Moss as facilitator. All individuals on the LGBTQ+ continuum are welcome in this group and can find connection, community and support in a safe, confidential and nurturing environment.

In summer 2023, Kevin stepped down and Ely Willard took over facilitator duties. The group meets once a month in person (outdoors in the warmer months) and there are currently between eight and ten regular members. There has been a lot of turnover in the last year, but the group's current size feels healthy and its membership is committed to attending regularly. Not all group members are affiliated with FUSIT, and some are loosely affiliated but their main involvement in the congregation is through this group, indicating a reach beyond the immediate FUSIT community.

The membership is interested in pursuing a service project that would bring us into greater contact with the broader LGBTQ+ community in Ithaca, but at the moment this is still a work in progress.



*Submitted by Eleanor Willard*

## Ministry Visioning Team (MVT)

This year the Ministry Visioning Team members are Emily Richards, Certified Religious Educator (CRE), Director of Congregational Life Director and Director of Religious Exploration, Rev. Janet Shortall, Director of Pastoral Care, and lay leaders, JoAnn Kowalski, Don Rakow, and Nancy Miller. Along with the Operations Administration Team, we are one of the two Partnership Teams that support and guide the staff and volunteers that bring to life the various activities that comprise the Ministry of the First Unitarian Society of Ithaca.

This year our spiritual leaders are Emily Richards CRE, Rev Janet Shortall, and Rev Peaches Gillette. MVT wants to express our deep gratitude for everything that these three bring to our Beloved Community.

### Our major work:

- Support and Supervision of the Ministry Staff including end of year evaluations and annual review of job descriptions/ contracts.
- Supporting the Ministry Teams in their work and collaboration with each other through the Team Leader Council and individual Team support efforts, especially Social Justice work.
- Recruiting volunteers for various ministry work.
- Recruiting for and hiring an Engagement and Outreach Coordinator.
- Organizing Engagement and Outreach tasks this spring when the E&O Coordinator position was again vacant.
- Developing and implementing a Staff Wellbeing Initiative in collaboration with Board member Megan McCormick.
- Working to improve communication and collaboration with other governance partners (Board, OAT, and the Governance Committee).
- Initiating plans for a Leadership Skill-building workshop for the coming fall.
- Reconfiguring the job descriptions, job titles, and contracts of our three spiritual leaders for the 24-25 church year.
- Participating in the 2024-2025 Budget Team.

Thank you to all who have contributed to the growth and vitality of this congregation this past year!

*Nancy Miller for the Ministry Visioning Team*

## Operations Administration Team (OAT)

OAT began the church year with Michelle Waffner, Don Barber, Dick Kurtz, and Rod Howe as team members. Rod left OAT in December and was replaced by Simon Catterall.

Highlights of OAT's work in 23-24 can be found below.

- **Building Use Policy:** This policy was updated to reflect current procedures. Rental rates increased by 20%.
- **Alcohol Use by Renters:** Procedures for serving alcohol were created/clarified to minimize FUSIT's risk. These were added to rental contracts.
- **Safety Team:** John Gaines stepped down as Safety Team leader and Dick Kurtz took this over. See separate Safety Team report.
- **Staff Equipment Use:** Since COVID most staff work remotely rather than in the church offices. OAT is creating an equipment use policy to set expectations around office equipment use. This should be finalized soon.
- **501(c)3 Sponsorship:** FUSIT acted as the fiscal sponsor of the Kids Discovery Trail, allowing them to accept tax deductible donations.
- **Bloc Power:** OAT worked with the environmental interest group to secure a grant to install heat pumps in the Annex. This work is scheduled to be completed this summer.
- **Tech Team:** A sound system with increased capacity including livestreaming was installed in the sanctuary during COVID. However, we do not currently have enough volunteers to handle all the events that occur. Additionally, the tech team has requested professional assistance to evaluate our system, provide training and analyze our current tech operations. OAT created a Requests for Proposal document that was sent to local AV technicians and we are currently looking for someone to fulfill these roles.
- **Contractors:** OAT created a template to use for any contractors/subcontractors who do not have their own contract to make sure the terms of the job are clear and to cover any liability.
- **Long-Term Rentals:** OAT talked about long term rentals in order to have some clarity and fairness around the pricing. It was decided that long term renters will receive a 50% discount.
- **Hiring Procedures:** Hiring procedures were finalized to provide more clarity.
- **Phone System:** We have been having some issues with the phone system. Michelle has been researching the move to Voice over Internet Protocol (VoIP) phones with the plan to move away from the landlines to VoIP in the 24-25 church year.

The OAT members have enjoyed their time on this team and look forward to serving the FUSIT community again next year!

*Submitted by Michelle Waffner, Director of Congregation Administration*



## Music Team

The mission of the Music Team is to provide a variety of high quality music for Sunday Celebrations and to encourage and facilitate musical participation from the church community. Our Music Team members are Stephanie Ortolano (chair), Jayne Demakos, Jack Roscoe, Sue Roenke, Emily Richards, Tim Ball, and Kevin Moss.

### Adult Choir

Under the leadership of Choir Director Jayne Demakos, our adult choir continues to provide an opportunity to create inspiring music for Sunday services and a weekly time for connection and care.



### Sage Chapel on Christmas Eve

Our Sage Chapel Christmas Eve service was well-attended and the choir included almost 50 voices, including members from our Adult Choir plus other singers from the wider community. Special prelude music was provided by Erica Howard on oboe, Roberta Crawford on viola, Alex Shuhan and Heidi Oros on French horns, Liz Shuhan on flute, and Nathaniel Shuhan on piano. Our Silent Night string section included Kathy McHugh and Tim Ball on violins, Josephine Jenkins-Ortolano on cello, and Roberta Crawford on viola.



### Beacon on Aurora

Our monthly concert series continues to grow and this first full year of programming brought a variety of talented musicians into our sanctuary. The goal of the concert series is to bring people together to enjoy music in the folk/indy folk tradition from artists touring regionally and nationally. Members of the wider FUSIT community have helped with baking, coffee-making, ticket sales and more.



### Special Music Sundays

In addition to our monthly Choir Sundays, this year we had sixteen other guest artists join us for Sunday morning worship. Some of these guests use our space regularly, like VOICES Multicultural Chorus and the Children's Chorus of Ithaca, and others were musicians who were bartering for one-time events. We had solo piano, a string quartet, traditional Mexican songs on guitar and voice, an a capella group, banjo, violins, and more!

Our Music Team Music Service Sunday on February 11 featured Crys Matthews. She gracefully wove songs and stories about her life and the importance of music to inspire and energize social justice movements.

*Submitted by Stephanie Ortolano*

**W E L C O M E**

***We warmly welcome those who have become new members this year:***

*- Michelle Buttino - Mike Daniels - Deborah Diehl - Michele Hochstetter - Bob Melfi  
- Ginger Melfi - Mariab Prentiss - Susan Salton - Erin Treat - Matt Franke-Singer*

## Nominating Committee

The Nominating Committee (NomCom) is elected each year by the full congregation at the annual meeting.

Traditionally the Committee took its mission from the Bylaws' charge: "The Committee shall work throughout the year to identify and assess members whose interests, abilities and talents would provide leadership on the Board of Trustees." Recently NomCom began to consider the second Bylaws charge that hinted at a broader role: "The purpose of the Nominating Committee is to assure that the Society has effective and diverse leadership to guide the future operations of the Society."

NomCom will be reviewing the range of leadership skills needed and preparing a proposal for long term success of the Society. The proposal will consider any necessary funding, staffing, and management of such a program.

*Submitted by Elizabeth Bixler*

## Personnel Committee

The Personnel Committee welcomed Megan McCormick as the committee's liaison to the Board of Trustees. Continuing as members are Carolyn Emerick, Susan Murphy, and Jenna Rosenberg, as chair. Michelle Waffner, Congregational Administrator, met with the committee, as needed, during the year.

The committee began the year clarifying the need for the committee to remain as a standing committee of FUSIT, recognizing that it will meet less frequently than it has in the past as many of the key items have been addressed.

The committee outlined its priorities for the year:

- Finish the review and revision of the Board Policy Book as it pertains to Personnel;
- Finish work on the Ombuds proposal and if it is accepted, **function as a resource**;
- Finish review and editing of the Employee Handbook;
- Finalize pending issues **including the hiring process and the existence of a probationary period.**

The suggestions for the Board Policy Book were reviewed by the Board and have been adopted as appropriate. The Ombuds proposal remains in the hands of the Board; discussions are continuing with both OAT and MVT about where this role might best be assigned.

The committee reviewed the excellent work done by Michelle Waffner on the Employee Handbook and clarified several areas. It is the intent of the committee to forward the completed Handbook to the Board for approval at its May 2024 meeting. Michelle will continue to keep the Handbook current with FUSIT policies and protocols as well as federal and state statutes and regulations. The Committee will review the Handbook, formally, each year.

This committee worked with Michelle to finalize several HR related processes. It also reviewed contracts for the coming year for two individuals and reviewed the job responsibilities and description for another staff member.

The committee thanks all the staff who continue their commitment to FUSIT and help it be a spiritual home for our members and guests.

*Respectfully submitted, on behalf of the committee  
Susan H. Murphy*

## Religious Exploration

*2023-2024 has been a year of returning to programming and trying new things for our Religious Exploration (RE) program. Here are some of the highlights.*

- Classroom Sundays were offered twice a month for the first time since 2020, with three classrooms, PreK-1st, 2nd-5th, and 6th-12th.
- Our Nursery was open every Sunday! A huge thank you to Melissa Heslop, our Childcare Coordinator.
- Classroom volunteers for this year were: Jessica Brown, Juliana Garcia, Lora Timonin, Rev. Janet Shortall, Elisa Collins-Zinda, Julianne Schulte, Josephine Ennis, Rita Rosenberg, Seema Mathur, Brisa Teutli, John Gaines, and Mike Timonin.
- Multiple Creative Sundays were offered during which community members shared their skills and talents including: Mary Clabby, Cheryl Botts, and JoAnn Kowalski.
- A huge thanks to all of our substitute teachers, who stepped up to make sure our children and youth always had the support they needed: Sue Roenke, Carrie Lang, Beth Mudge, Madonna Stallmann, Keith Perry, Gareth Richards, Anthony Natale, Magdalen Lindeberg, Michelle Hochstetter, and our Childcare Coordinator, Melissa Heslop.
- Thanks to Madonna Stallman and Loretta Heimbuch who handed out candy for us on Halloween.
- We have welcomed twelve new families to RE this year.
- Crossing Paths was offered for the middle school and high school youth and visits were made to Binghamton UU, Calvary Baptist, Tikkun V'or, Namgyal Buddhist Monastery, BAPS Mandir, the Quaker Meetinghouse, and a visit with local pagan practitioner to make Pagan Altars.
- Music classes for babies, toddlers, and young children were offered three times a month for free to the Ithaca community.
- Pub Theology ran each month on the fourth Tuesday.
- A new Small Group Ministry for Parents, which includes childcare for those in attendance, began in the spring.

*(continued on page 17)*



## Religious Exploration (continued)

- Special events offered this year include:
  - Back to School Blessing
  - Trick Or Treating at First UU
  - All-Ages Game Night
  - Holiday Decorating Party
  - Winter Solstice and Yule Celebration
  - No-Rehearsal Holiday Pageant
  - Holiday Cookie Decorating
  - 4th Annual StUuffy Sleepover
  - Love Month Cards and Crafts
  - Spring Celebration
  - Take Apart Party
  - Multiple Movie Nights
  - All Thing “Baby” Swap
  - Playdate in the Park
- Attendance at Sunday morning RE continues to increase, with several dates seeing well over thirty children in attendance.
- A new program is being planned for summer 2024. Camp Aurora will include three full weeks and a two day offering at the end of June.
- A Share Your Wisdom RE volunteer campaign to encourage volunteers for the 2024-25 church is running this spring.



*A glimpse of some of the fun activities that the RE program engaged in this year.*

*Religious Exploration Staff*

## Safety Team

The Safety team has been focused on several issues this 23-24 year:

### Security

To care for our property, and in concern for the safety of our people, whether congregants, staff, guests or other users, we installed security cameras at all property entrances. The cameras are visible, so as to be a deterrent to possible vandalism and unauthorized entry. They have limited data storage capabilities, as part of our concern for individuals' privacy, but do allow us to post-review incidences when needed.

### Building Access

Our buildings are used by multiple FUSIT groups, also many community individuals and groups. It is used at all hours of the day, and days of the week. The current system of door locking does not meet the access requirements for the various types of activities in the facilities. We need to provide easy access to users, with assurances that the building remains secure during and after use. We are investigating better solutions, including door locking technology, and access policy.

### Fire Safety

A review of fire Safety policy and procedures was completed during the year.

### Personal Safety policies

We are beginning review of our policies and needs to assure the personal safety of any facilities users. Personal Safety issues include medical emergency, disruptive behavior, active shooter, and others. Some of these issues have become more concerning, due to the current political environment. In the past we had individuals trained to deal with these types of situations, and we have lost many of them. We are reviewing our policies, and potential sources of training for individuals who are willing to be part of a group who assure the safety of our congregation.

*Submitted by Dick Kurtz*



## Small Group Ministries

Small Group Ministry (SGM) has been part of FUSIT for 23 years, and embodies FUSIT's mission:

- Confidentiality, deep listening and sharing life experience allow members to form deep **connections**.
- Our topics **inspire** us to lead more intentional lives.
- Service projects **engage** and assist either FUSIT, Ithaca, or beyond.

There are 8 SGMs containing 66 people. SGM topics are drawn from Soul Matters, the UU SGM Network, or member suggestions. Groups meet in-person (inside or outside), on zoom, or a combination of these, once or twice each month, on Sunday and Friday mornings, and Monday, Tuesday, and Wednesday evenings. Groups welcome new members as their size allows. Two groups are new this year: Sue Roenke's new group meets twice monthly on Zoom, uses Soul Matters topics, and currently has four regular attendees. Emily Richards' new group is for people who are actively parenting, meets at FUSIT after the service monthly on the third Sunday, and childcare is provided.

The SGM facilitators are Andrew Quagliata, Sue Rakow, Mike Mann, John Gaines, June Locke, Ely Willard, Emily Richards, and Sue Roenke. The facilitators' group, which provides support, mentoring and training for facilitators, met on zoom in November and April. The meetings consist of a business meeting led by Marsha Kardon, and a SGM session led by Emily Richards.

Service projects this year have included:

- Assisting Village at Ithaca by delivering food and household products to families supported by the Village
- Caring for Hazel's Backyard
- Preparing lunches for St. John's food services quarterly
- Volunteering for Trees Up Tompkins: replacing invasive plants with native trees to improve the environment and support migrating and resident birds.

To raise awareness of SGM, there was an SGM table at the Activities Fair in November and a Sunday service in the spring during which the congregation met in small groups.

To find out more about SGM, or to join a group, contact Marsha Kardon at [mfkardon@gmail.com](mailto:mfkardon@gmail.com) or 607-592-2520, or call the FUSIT office.

## Social Justice Leadership Team (SJLT)

The Social Justice Leadership Team, SJLT, has worked consistently throughout the past year to engage both short term (often charity) projects as well as longer term social justice and equity initiatives. We did these things by coordinating and organizing with others at FUSIT as well as by conducting outreach to local groups.

Many short term projects include several interactions and tasks at the Village at Ithaca, the Rise Together campaign to forgive medical debt, coordination and participation in the Ithaca Green New Deal as well as monthly coordination for the Shared Plate and Side with Love ministries, among many others.

Longer term activism/equity work was engaged when we unanimously voted to petition to ban High Pressure CO<sub>2</sub> Fracking as well as an ongoing series of outreach events with local groups we call Social Justice Coffee Circles.

See link below for the whole report which reflects the many and different accomplishments of the group over its first full year since becoming transformed and reactivated.

<https://tinyurl.com/SJLTAnnualReport>



### Stewardship Team

During February and March 2022, the Stewardship Team conducted the "Gifting Grows Connections" Stewardship campaign to raise funds for the 2024 - 2025 church year. Planning began in January and efforts were coordinated with the Finance Committee, Treasurer, and Board as the budget process progressed.

Our opening celebration on February 27, a week after pledge letters were mailed, included an inspiring sermon by Emily Richards, testimonials from several congregants describing how FUSIT programs are having impact, and spirited music as congregants danced their pledge cards down the aisle. Virtual attendees also were invited to pledge, and even offered delivery of soup while in-person congregants enjoyed the StewardSoup lunch in the Annex. One change this year was to send out pledge request letters as an invitation to the launch ceremony, and without pledge cards. Pledge cards were subsequently mailed to households that had not yet pledged.

After a strong start, our projected pledge total for this year was \$320,000, so this became our target. The projection assumed that everyone who pledged last year also would pledge this year with no change in pledge sizes. So far pledges have come in from 136 households. These included 17 first time pledges, 67 with an increased amount, 42 the same as last year, and 10 with a decreased amount. Six pledging members either moved, left the congregation, or passed away. Although the projection had some conservative assumptions, the expectation of consistent pledging is not what we are experiencing. At this point we are not near the target because multiple previously generous congregants have not pledged yet this year.

*(continued on page 19)*

## Stewardship Team *(continued)*

We have an experienced core team working with strong support from staff and many congregant helpers! The Stewardship Team deeply misses Amelia Habicht, who joined two years ago and brought fresh eyes and energy before her passing. Other members include Wendy Schaerer, Jack Roscoe, Jeanette Knapp and Board Liaison Margaret Nichols. Thanks to Mike Daniels who energetically helped the team for a considerable portion of this year's pledge campaign. We also thank team alumni Sam Weeks and Terry Starr for generously pitching in by operating the Stewardship table during coffee hour. The Stewardship team also is very grateful for thank you note efforts by Liz Einstein, Terry Starr, and Kimari Johnson. Phone call help was generously provided by Board members Don Barber and Fred Balfour. Thank you to Loretta Heimbuch for making the gorgeous campaign graphic and prompting Matt for newsletter contributions, and to Michelle Waffner for excellent management of the member list and pledges.

Pledges can be made at any time, but each year the Stewardship team encourages everyone who can to make their pledge by the end of April, so the Treasurer, Finance Committee, and Board can settle on next year's budget in time for the Annual Meeting in May. As of this writing, we continue to contact by phone those who pledged in a recent year, but not yet this year, to thank them for past support and invite continued gifting to grow connections. Payment of pledges is made easier by setting up an auto-payment feature from your bank – Michelle Waffner can help set that up.

Matt Hare has reached out to UUA stewardship consultants to review our practices and explore alternative strategies. Consultants will probably be on site this Fall. Meanwhile, we are in great need of additional team members. FUSIT members with graphics skills, copy editing skills, and/or lots of social connections within our congregation are especially encouraged to contact Matt Hare, Stewardship Chair, for more information at [stewardship@uuithaca.org](mailto:stewardship@uuithaca.org).

## Tech Team

The Tech Team's core function is to facilitate Sunday services by volunteering to operate FUSIT's sound system and live streaming system. The live stream videos maintain connections with members who can't make it to church each Sunday, and form an archive of past sermons that is easily accessible. Tech team members also volunteer to support memorial services for church members.

Returning members Tim Ball, Steve Doria, a group, the team has created and updated morning and helped troubleshoot problems

*Submitted by Tim Ball*



## Team Leaders Council

Team Leaders Council (TLC) was created as a way for leaders within our community to share with one another information about what each team has been working on, offer avenues for collaboration, and to increase communication between the various members.

When first formed the TLC was composed only of leaders of the ministry teams but has widened to include the leaders of the committees from the board side of our partnership governance structure. This change has allowed for an even greater understanding among the members in regards to the different aspects of ministry, administration, and governance that keep this society going and what a labor of love it truly is.

Teams and committees which have had representation on the TLC for the 2023-2024 year include the following:

- 8th Principle Action Team
- Aesthetics
- Babies First
- Buildings and Grounds
- Care Team
- Celebrations
- Communications
- Engagement and Outreach
- Finance
- Governance
- Healthy Congregations
- Hospitality
- Music
- Nominating
- Personnel
- Religious Exploration
- Adult Religious Exploration
- Small Group Ministry
- Social Justice
- Stewardship

and Arthur Woll were joined by John Gaines in 2023-24. As documentation for the procedures that are used on Sunday with equipment.



## Welcoming Renewal Team

This year the First Unitarian Society of Ithaca chose to renew their commitment to being a congregation and community by taking intentional steps to be more welcoming and inclusive of people of all sexual orientations and gender identities. Members of the Welcoming Renewal Team included: Emily Richards CRE, Kevin Moss, Loretta Heimbuch, Tom Coakley, and Elisa Collins Zinda.

As a part of this effort this congregation fulfilled the Five Practices of Welcoming Renewal.

- **Become a Welcoming Congregation**  
-First Unitarian Society of Ithaca has been a Welcoming Congregation since 2000.
- **Incorporating Welcoming Worship Services**  
-Three services were held with a specific focus on lifting up the LGBTQ+ experience and issues important to the community.  
-September 24th: Our Commitment to Welcoming  
-January 21st: Never Too Old  
-June 2nd: Pride - in collaboration with our First UU choir
- **Welcoming Days of Observance.**  
-Annual Days of Observance were marked in the Monthly Newsletter and Weekly Announce, as well as verbally lifted up during multiple throughout the year.
- **Welcoming Religious Education**  
-LGBTQ+ Allyship Workshop on April 7th  
-Dr. Cortney Johnson (she/they) led a discussion about LGBTQ+ allyship. This conversation focused on introductory information about gender, sex, sexuality, and romantic orientation, as well as terminology and best supporting the LGBTQ+ community.
- **Support a Welcoming Project**  
-Our Side With Love collections for the month of March went to Out for Health. The Out for Health team is starting a gender affirming clothes closet, as clothing can be a powerful tool for helping people feel affirmed in their gender identity.  
-Our Shared Plate in March went to Planned Parenthood with a donation of \$656

Additional ways that this community worked together to widen our circle of support for LGBTQ+ folks include: a book group for Authentic Selves, multiple Time for Wonders and religious exploration sessions lifting up and normalizing LGBTQ+ identities, an Identity Survey for the UU community, and a possible partnership with the Ithaca Pride Alliance for June.

*Submitted by Emily Richards, CRE*

## Women's Circle

The Women's Circle continues to meet monthly on Zoom to keep a connection with a couple of women who have no longer live in Ithaca but want to stay connected. We support one another as we navigate personal transitions, illnesses, and just the travails and joys of life. We average 6 to 8, so we are a small group.

*Nancy Miller, May 2024*



**LGBTQ+ / TGQNB\* Days of Observance**  
*All of who you are is sacred. All of who you are is welcome.*

<b>National Black HIV/AIDS Awareness Day (NBHAAD)</b>	<b>1st Wednesday of February</b>	National Black HIV/AIDS Awareness Day (NBHAAD), a national HIV testing and treatment community mobilization initiative targeted at Blacks in the United States and the Diaspora.
<b>International Transgender Day of Visibility (TDOV)</b>	<b>March 31</b>	Celebrated to bring awareness to transgender people and their identities as well as recognize those that helped fight for rights for transgender people.
<b>Day of Silence</b>	<b>April</b>	April; Day varies from year to year. GLSEN's Day of Silence is an organizing tool to end the silencing effect of anti-LGBTQ bias.
<b>Lesbian Visibility Day</b>	<b>April 26</b>	Origin unknown, but recognized since 2008 as a way of acknowledging perceived erasure of lesbian spaces and the need to preserve and celebrate lesbian culture, distinct as it is from other gay, bi, trans, and queer experiences.
<b>International Day Against Homophobia, Transphobia and Biphobia</b>	<b>May 17</b>	The main purpose of the May 17 mobilizations is to raise awareness of violence, discrimination, and repression of LGBT communities worldwide.
<b>LGBT Pride Month</b>	<b>June</b>	June is celebrated as Pride in honor of the Stonewall Riots, though Pride events occur all year round. It also marks the month that same-sex marriage was legalized in the United States.
<b>Pulse Night of Remembrance</b>	<b>June 12</b>	Annual day of US remembrance for the loss of 49 people in the Pulse Nightclub shooting in Orlando, Florida on June 12, 2016.
<b>Stonewall Riots Anniversary</b>	<b>June 28</b>	To remember the Stonewall Riots that are described as the start of the Trans and Gay Liberation Movement in the United States.
<b>Celebrate Bisexuality Day</b>	<b>September 23</b>	Also referred to as Bisexual Pride Day, CBD, Bisexual Pride and Bi Visibility Day.
<b>LGBT History Month (USA)</b>	<b>October</b>	First celebrated in 1994 in October. It was declared a national History month by President Barack Obama in 2009.
<b>National Coming Out Day</b>	<b>October 11</b>	National coming out day celebrates lesbian, gay, bisexual, transgender, and queer people's coming out experiences and journeys.
<b>Intersex Awareness Day</b>	<b>October 26</b>	Celebrated in October to commemorate the first intersex protest, which took place in Boston, MA.
<b>Transgender Day of Remembrance (TDOR)</b>	<b>November 20</b>	Transgender Day of Remembrance was set aside to memorialize those who were killed due to anti-transgender hatred or prejudice.
<b>World AIDS Day</b>	<b>December 1</b>	Recognized in 1988 by the United Nations.

\*TGQNB - Transgender; Genderqueer; Non-Binary

For more information on UUA LGBTQ+ programs and resources email [lgbtq@uua.org](mailto:lgbtq@uua.org). Learn more about UUA Welcoming Congregations and LGBTQ+ / TGQNB Inclusion, and more at [www.uua.org/lgbtq](http://www.uua.org/lgbtq).

# 2024-2025 Budget Proposal

	21-22 Budget	22-23 Budget	23-24 Budget	24-25 Proposed Budget
<b>INCOME</b>				
Pledge and Grant Income	317,000	330,000	310,000	320,000
Auction	12,000	10,000	14,000	8,000
Endowment	14,000	14,000	14,000	17,000
Total Rent	37,000	38,600	52,136	54,752
Plate Collections	15,000	10,000	12,000	15,000
Christmas Eve Collection	3,000	3,000	3,000	3,000
Shared Plates	0	5,000	5,000	5,000
New Fund Raisers/Initiatives	0	0	5,000	12,000
One-time Cash Carryover	0	0	25,000	0
Other Income	<u>2,000</u>	<u>2,000</u>	<u>2,000</u>	<u>2,000</u>
<b>TOTAL INCOME</b>	<b>400,000</b>	<b>412,600</b>	<b>442,136</b>	<b>436,752</b>
<b>EXPENSES</b>				
<b>ADMINISTRATION</b>				
Administrative Personnel	62,141	72,234	76,299	88,887
Contingency	400	0	400	400
Copying	1,500	1,500	1,500	1,500
Database Fees	0	0	2,000	2,000
Denomination Contributions	13,090	12,000	12,000	10,000
Disability Insurance	1,800	2,000	2,000	2,000
Office Equipment	1,200	1,200	1,200	1,200
Office Supplies	1,100	1,200	1,400	1,400
Payroll Accounting Service	2,100	2,400	2,400	2,400
Payroll Taxes	10,968	16,685	17,686	20,736
Postage	1,500	1,500	800	800
Startup Retreat	200	0	500	500
Stewardship Committee	3,000	3,000	1,000	1,000
Tech Support	1,500	1,500	1,500	1,500
Telephone/Internet	2,800	2,800	2,800	2,800
Workers' Compensation	<u>3,200</u>	<u>3,400</u>	<u>3,400</u>	<u>3,400</u>
<b>Total Administration</b>	<b>106,499</b>	<b>121,419</b>	<b>126,885</b>	<b>139,523</b>
<b>CHURCH MAINTENANCE</b>				
Building Personnel	16,041	24,780	26,866	27,653
Annual Inspections	4,000	5,000	5,000	5,000
Building and Liability Insurance	9,100	9,500	10,000	12,000
City Sidewalk Assessment	500	500	700	700
Debt Service	8,400	8,400	8,400	0
Garbage/Recycling	500	500	500	500
Housekeeping Supplies	1,300	1,300	1,500	1,500
Repairs and Routine Maintenance	12,617	20,000	20,000	20,000
Utilities	<u>18,500</u>	<u>19,800</u>	<u>19,800</u>	<u>19,800</u>
<b>Total Maintenance</b>	<b>70,958</b>	<b>89,780</b>	<b>92,766</b>	<b>87,153</b>
<b>MINISTRY</b>				
Ministry Personnel	131,315	60,360	66,241	52,538
Celebration Supplies	1,800	2,500	2,500	3,000
Christmas Eve Service	600	600	3,000	3,000
Communications Equipment	500	600	600	600
Enhancement and Aesthetics	100	200	200	200
Guest Honorariums	0	3,900	3,000	3,000
Newsletter	700	700	400	400
<b>Total Ministry</b>	<b>135,015</b>	<b>68,860</b>	<b>75,941</b>	<b>66,738</b>
<b>MUSIC</b>				
Music Personnel	20,619	32,431	33,318	34,225
Christmas Eve Music	500	1,000	1,000	1,000
Equipment and Supplies	350	600	600	600
Guest Musicians/Workshop	500	700	700	700
Music Service	450	700	700	700
Organ Repair	300	1,400	1,400	1,400

# 2024-2025 Budget Proposal

Piano Repair	0	500	500	500
Sheet Music	<u>0</u>	<u>500</u>	<u>500</u>	<u>500</u>
<b>Total Music</b>	<b>22,719</b>	<b>37,831</b>	<b>38,718</b>	<b>40,905</b>
<b>RELIGIOUS EXPLORATION</b>				
RE Personnel	61,163	83,033	89,946	93,814
Adult RE	400	400	400	400
C & Y Arts Enrichment	450	450	450	450
Children's Programming	675	675	675	675
Library	0	200	475	475
Parent Outreach	450	450	450	450
Shared Ministry Service	250	250	300	300
Sunday Snack	400	400	400	400
Supplies	600	600	600	600
Teacher Appreciation	300	300	300	300
Teacher Training-OWL	0	1,000	1,000	1,000
Texts	475	475	475	475
Youth Group	<u>500</u>	<u>500</u>	<u>500</u>	<u>500</u>
<b>Total RE</b>	<b>65,663</b>	<b>88,733</b>	<b>95,971</b>	<b>99,839</b>
<b>SOCIAL ACTION</b>				
Anti-Racism	1,200	500	800	800
Area Congregations Together	0	0	150	150
Charitable Giving	8,000	8,000	8,000	8,000
Childcare	380	380	380	380
Membership	0	700	700	700
Rental Docent	300	300	300	0
SJC Programs	850	850	850	<u>850</u>
<b>Total Social Action</b>	<b>10,730</b>	<b>10,730</b>	<b>11,180</b>	<b>10,880</b>
<b>TOTAL EXPENSES</b>	<b>411,583</b>	<b>417,903</b>	<b>441,561</b>	<b>445,038</b>
<b>NET INCOME</b>	<b>-11,583</b>	<b>-5,303</b>	<b>575</b>	<b>-8,286</b>


## Treasurer's Report

When it comes to finances, this has been a satisfactory year for our organization. Though we will end with a budget deficit, this was as projected in the budget that was accepted at the 2023 Annual Meeting. From the perspective of that budget, expenses were as expected. Revenues have also met expectations, with the exception of 'New Fund Raisers', which came up shorter than predicted. We will, as a congregation, need to look at ways we can expand our efforts for innovative fund-raising initiatives in '24-25, perhaps with events such as this spring's successful Cabaret.

Despite the deficit, cash balances, though reduced, are satisfactory. This is mostly because we could rely upon a budgetary surplus from the previous year that we applied to this fiscal year.

Due to health troubles, the Finance Committee has lost members over the last year or so. This has been difficult for all of us. But the good news is that the Finance leadership has been reinforced by several new, energetic additions to our lay leadership.

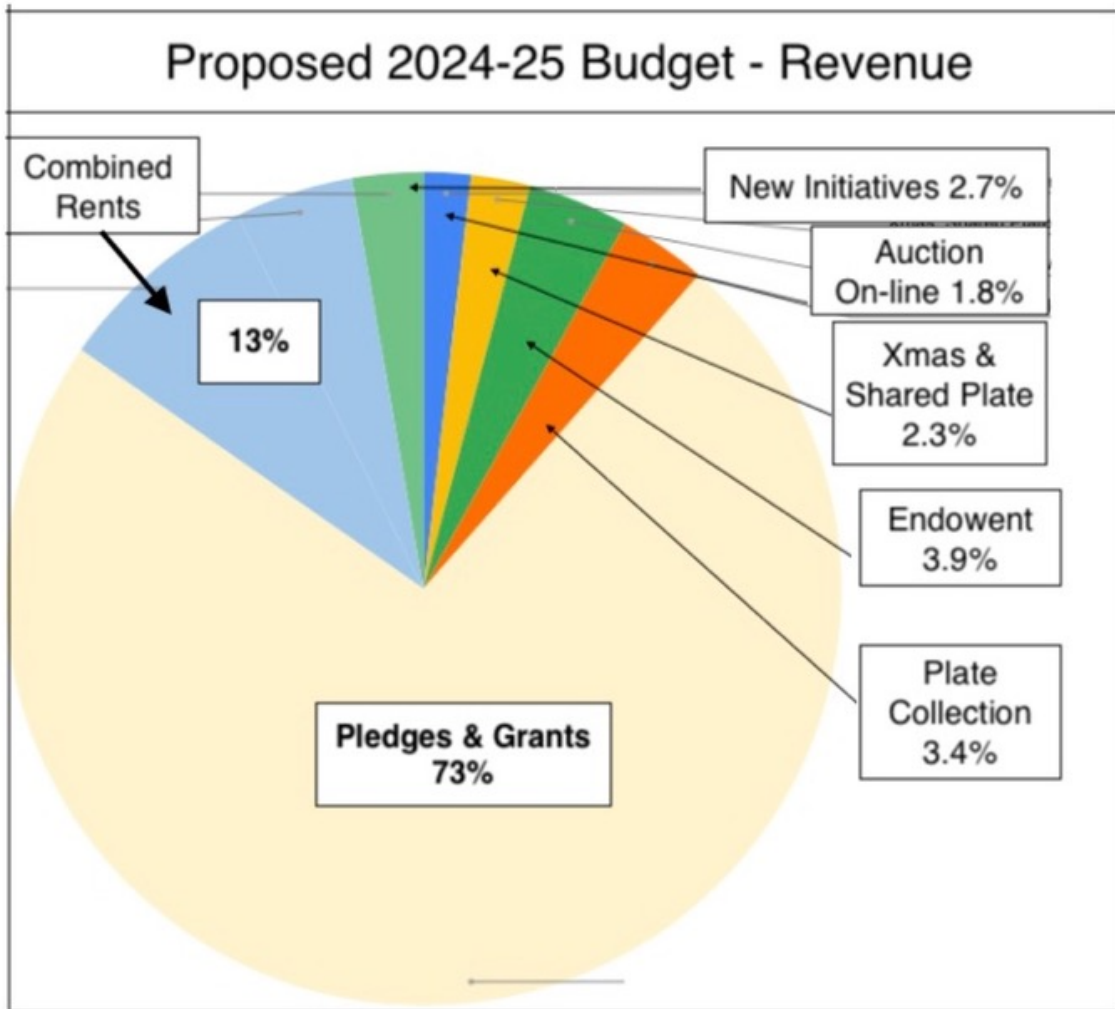
*Submitted by Walt Peck, Treasurer*



***Innovative fund-raising initiatives are needed!***



<b>Proposed 2024-25 Budget - Revenue</b>			
Revenue Comparisons - FY2023 to FY2025			
Revenue	FY 2022-23	FY 2023-24	FY2024-25
Auction, On-Line	10,000	14,000	8,000
One-time Cash Carryover	0	25,000	0
Xmas, Shared Plate, Misc	10,000	10,000	10,000
Endowment	14,000	14,000	17,000
Plate Collection	10,000	12,000	15,000
Pledge & Grant	330,000	310,000	320,000
New Fund Raisers	0	5,000	0
Annex Rent	30,600	32,136	34,752
Building Rent	8,000	20,000	20,000
New Initiatives	0	0	12,000
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<b>Total Revenue</b>	<b>412,600</b>	<b>442,136</b>	<b>436,752</b>

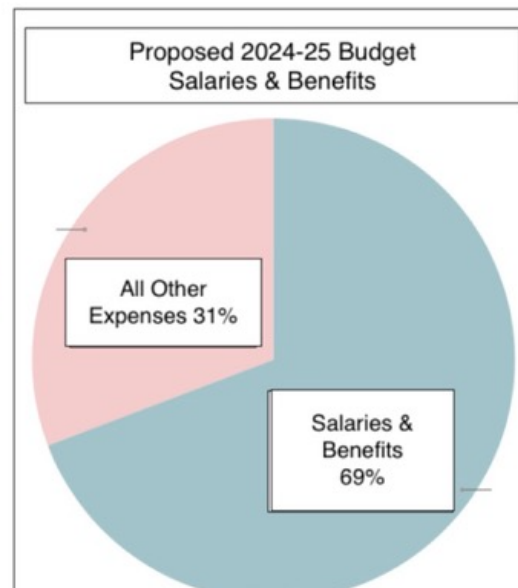
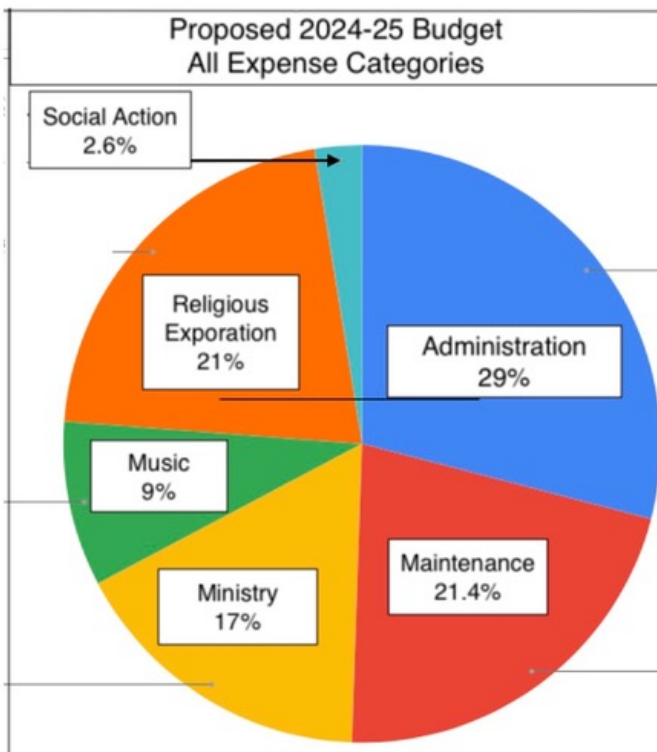


## Proposed 2024-25 Budget - Expenses

### Expense Comparisons - FY2023 to FY2025

EXPENSES	FY 2022-23	FY 2023-24	FY 2024-25
Administration	121,419	126,885	139,523
Church Maintenance	89,780	92,766	87,153
Ministry	69,860	75,941	66,738
Music	37,381	39,718	40,905
Religious Exploration	88,733	95,071	99,839
Social Action	10,730	11,180	10,880
-----	-----	-----	-----
<b>Total Expenses</b>	<b>417,903</b>	<b>441,561</b>	<b>445,038</b>
<b>Net Income or (Loss)</b>	<b>(5,303)</b>	<b>575</b>	<b>(8,286)</b>
Net Income (Loss) Restated*	<b>(5,303)</b>	<b>(24,425)</b>	<b>(8,286)</b>

\* In the 2023-24 revenue budget, the \$25,000 carryover fills a budget gap.  
 Budgeted Revenue generated in 23-24 is \$24,425 less than budgeted expenses.



## Finance Committee

The Committee meets monthly during the Church year. Members include: Walt Peck (FUSIT Treasurer), Don Barber, Tom Coakley, Jens Wennberg, Rich Dolge (Endowment Chair), Patrick Jordan (Endowment Treasurer), and Nathan Fawcett (Committee Chair). The Finance and Endowment Committees continue to meet jointly in 2023-2024 and both the Chairs of the Stewardship and Building and Grounds Committees were invited periodically to coordinate finance related matters. The Chair, Nathan Fawcett, has not been able to participate in recent months. Fred Balfour and Scott Grover agreed to assist in administration duties related to the Chair position.

On a regular basis, the Committee reviewed FUSIT monthly financials and discussed, with the Treasurer, progress to date on budget vs actual income and expenditures.

Due to declining pledges, the Committee has been reviewing a variety of income producing activities. Many initiatives will be implemented in 2024-2025.

Jim Skaley's untimely death postponed progress on preparation of the next five-year FUSIT financial plan, and resumption of that task will be a high priority for 2024-2025. Priority is also being placed on recruiting new members of the Committee, ideally reflecting a younger demographic.

*Submitted by Rich Dolge*

## Endowment and Investment Committee For the Year Ended June 30, 2023

### **Results for the year ended June 30, 2023**

As shown on the balance sheet that follows, the Endowment Fund ended the fiscal year with a total fund balance of \$816,016, as compared to \$742,176 in the prior year resulting in a net increase of \$73,840 for the year. Total income for the year amounted to \$80,855. This included \$6,002 in contributions, \$780 in semi-annual distributions from the Hare Trust, \$6,918 in interest and dividends, and \$67,155 in realized and unrealized losses on investments for the year. Total expenses for the year amounted to \$7,015. \$6,002 was spent on life insurance premiums paid for with contributions by the donor of the policy, and \$1,013 was spent on investment custodial fees.

### **Fund Balances**

As shown on the balance sheet, the Endowment Fund is comprised of a general endowment as well as individual funds restricted for specific purposes at the request of the donors.

### **Investments**

The Committee's investment policy was for the investment of the endowment funds in a conservative mix of index funds, with low volatility, low maintenance and low custodial fees. Restricted funds were separately invested in an intermediate-term bond index fund for accurate tracking and income allocation. During fiscal years 2013 - 2019, the Committee elected to reposition \$305,000 of the Endowment Fund's Assets to the Unitarian Universalist Common Endowment Fund (UUCEF) and utilize its investment management program.

### **Gifts to the General Endowment**

The Committee encourages friends and members of the congregation to increase contributions to the general endowment. It is vital to provide income with regard to future operating budgets. The Committee has also developed a program of planned giving to encourage various methods of giving that would be beneficial from income tax effect to the donor and help facilitate participation and growth in the endowment contributions. Information regarding this program is available at the church.

*Rich Dolge, Chair  
Patrick Jordan, Treasurer*

## Endowment Fund Balance Sheet

	<u>JUNE 30</u> <u>2023</u>	<u>JUNE 30</u> <u>2022</u>
<b>ASSETS</b>		
<u>UNRESTRICTED</u>		
CASH - CHECKING	37,854	16,693
INVESTMENTS		
CASH	19,509	19,647
MUTUAL FUNDS (VEXMX) @ COST	74,702	74,702
UNREALIZED GAIN (LOSS)	200,861	168,149
MUTUAL FUNDS @ MARKET	275,563	242,851
UU COMMON ENDOWMENT @ COST	181,596	187,601
UNREALIZED GAIN (LOSS)	72,596	52,151
UU COMMON ENDOWMENT @ MARKET	254,192	239,752
MORTGAGE RECEIVABLE - OPERATING	39,334	46,670
TOTAL UNRESTRICTED	<u>626,453</u>	<u>565,614</u>
<u>RESTRICTED</u>		
SPECIAL FUNDS		
CASH	48,458	44,179
UUCEF / COST	100,806	104,139
GAIN (LOSS)	40,299	28,950
MUTUAL FUNDS @ MARKET	141,105	133,089
TOTAL SPECIAL FUNDS CASH AND INVESTMENTS	<u>189,563</u>	<u>177,268</u>
TOTAL ASSETS	<u>816,016</u>	<u>742,176</u>
<b>LIABILITIES</b>	-	-
<b>FUND BALANCES</b>		
UNRESTRICTED	623,246	561,701
RESTRICTED - RE	2,150	2,150
RESTRICTED - LIBRARY FUNDS	1,057	1,057
SPECIAL RESTRICTED FUNDS		
CAPITAL IMPROVEMENTS FUND	64,999	60,783
CHAMBERLAIN TRUST	58,358	54,573
HAZEL'S BACKYARD	6,041	5,649
PERRY ESTATE (IN RESTRICTED MUTUAL FUNDS)	52,263	48,873
PIANO FUND	7,902	7,389
TOTAL RESTRICTED FUNDS	<u>189,563</u>	<u>177,268</u>
TOTAL FUND BALANCES	<u>816,016</u>	<u>742,176</u>
TOTAL LIABILITIES & FUND BALANCES	<u>816,016</u>	<u>742,176</u>



**Endowment Fund  
Income and Expenses  
For the period 7/1/22-6/30/23**

	UNRESTRICTED	RESTRICTED CHALLENGE PLEDGE	SPECIAL RESTRICTED						TOTAL
			CAPITAL IMPROVEMENTS	CHAMBERLAIN TRUST	HAZEL'S BACKYARD MAINTENANCE	PERRY ESTATE	PIANO FUND		
<b>INCOME</b>									
CONTRIBUTIONS	-	-	-	-	-	-	-	-	-
CONTRIBUTIONS - RE	-	-	-	-	-	-	-	-	-
CONTRIBUTIONS - LIBRARY	-	-	-	-	-	-	-	-	-
HARE TRUST	780								780
LIFE INSURANCE PREMIUM	6,002								6,002
INTEREST/DIVIDENDS UUCEF	-								-
INTEREST/DIVIDENDS TTC	5,825								5,825
INTEREST - CHECKING	9								9
INTEREST - MORTGAGE	1,083								1,083
UNREALIZED GAIN (LOSS) TTC	32,712								32,712
UNREALIZED GAIN (LOSS) CEF	20,445		3,892	3,494	362	3,129	473		31,794
REALIZED GAIN (LOSS) CEF	1,704		324	291	30	261	39		2,649
<b>TOTAL INCOME</b>	<b>68,560</b>	<b>-</b>	<b>4,216</b>	<b>3,785</b>	<b>392</b>	<b>3,390</b>	<b>512</b>	<b>-</b>	<b>80,855</b>
<b>EXPENSE</b>									
OPERATING PLEDGE	-								-
OPERATING TRANSFER	-								-
TRANSFER TO CAPITAL PROJECTS	-								-
CAPITAL PROJECTS EXPENSE	(6,002)								(6,002)
LIFE INSURANCE PREMIUM	-								-
BANK FEE UUCEF	(1,013)								(1,013)
BANK FEE TTC									
<b>TOTAL EXPENSE</b>	<b>(7,015)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(7,015)</b>
<b>NET INCOME</b>	<b>61,545</b>	<b>-</b>	<b>4,216</b>	<b>3,785</b>	<b>392</b>	<b>3,390</b>	<b>512</b>	<b>-</b>	<b>73,840</b>
<b>FUND BALANCE 6/30/22</b>	<b>564,908</b>	<b>-</b>	<b>60,783</b>	<b>54,573</b>	<b>5,649</b>	<b>48,873</b>	<b>7,389</b>	<b>-</b>	<b>742,176</b>
<b>FUND BALANCE 6/30/23</b>	<b>626,453</b>	<b>-</b>	<b>64,999</b>	<b>58,358</b>	<b>6,041</b>	<b>52,263</b>	<b>7,902</b>	<b>-</b>	<b>816,016</b>