



FIRST UNITARIAN UNIVERSALIST SOCIETY OF BURLINGTON

ANNUAL REPORT

2021



Mission and Values

Mission

We are united in our commitment to live out our mission to inspire spiritual growth, to care for each other and our community, to seek truth, and to act for justice.

Values

We are guided by our values:

Love: Nourishing lives with love, caring and compassion.

Service: Building a community for justice, equity and empathetic action.

Openness: Celebrating the wonders of life and spiritual transformation with boldness, joy, courage and openness.

Respect: Engaging all with kindness, understanding and mutual respect as faithful democratic stewards of all we hold dear.

Ends

We lead to see that our global ends are actualized:

Justice & Outreach: FUUSB uses its power as an organization and faith community to work for social, economic and environmental justice.

Worship & Music: FUUSB's welcoming worship, supported by powerful and diverse music and art, acts as a magnet that fosters spiritual growth, compassion, introspection and impetus to action.

Caring & Belonging: FUUSB is a compassionate community, offering all who engage in its ministries a profound sense of welcome, belonging, and spiritual care through life's joys, struggles, and sacred passages.

Spiritual Growth & Learning: FUUSB provides diverse opportunities for transformational spiritual growth, faith development and personal discovery, promoting lifelong learning for all ages and stages of life.

Stewardship & Resources: FUUSB generously stewards our mission and strongly supports ministries, activities and an historic building and spaces.



President's Report

2021 President's Report

As I sit down to write the president's report for the First Unitarian Universalist Society of Burlington, I am filled with hope. Perhaps it is the blooming flowers and singing birds that make this time of year a time of hope. It is also the FUUSB that lifts my spirits and carries me forward. So much has happened in the last year that has challenged us, worried us, and caused us to question. But equally important, we have stepped up to those challenges and reassured each other. We have found answers and more questions. I find myself counting our blessings and amazed at the resiliency of our beloved community.

I encourage you to read this entire annual report, as each group and committee in every ministry area has continued to find ways to fulfill our mission and work toward our vision. I cannot possibly list all the great happenings, so I will not even try. I will simply extend a most sincere thanks to our amazing staff, our volunteers and lay leaders, and everyone who has participated in so many ways over the last year.

From the board perspective I am also happy to provide a very positive, optimistic outlook. Our primary goal as a board this year was to increase the opportunities for members to provide input and gain understanding of our budgeting process. You have trusted the board with the considerable responsibility of directing our financial resources towards fulfilling our mission as effectively as possible. The input we received from you, our fellow congregants, was reassuring and helpful as we align our priorities and our finances. And thankfully, with careful stewardship of our assets and expenses, we find ourselves in a remarkably healthy financial condition.

Equally important is our continued pursuit of the goals of this period of developmental ministry. Two years ago, the board hired Rev. Tricia and charged her with the task of helping us work toward five developmental goals:

- Develop strong, intentionally diverse lay leadership
- Assist the congregation to live effectively at its current size
- Assist the Stewardship Team in growing the financial stewardship of the congregation
- Modify our policy-based governance model to better serve the needs of a mid-sized congregation
- Actively and meaningfully welcome, support, and empower congregants who are Black or other POC, LGBTQ+, have disabilities, and other congregants with marginalized identities

With only minimal modifications, we remain true to these developmental goals and continue to make progress on each of them. Are we there yet? Of course not. It is a basic tenet of our belief system that we can always do better. But we are moving in the right direction. And these goals, along with our Covenant, Mission, and Vision give us direction as we stretch into the future and create and embrace the opportunities we find there.

Dan House, for the Board of Trustees

Board of Trustees

First UU Society Board of Trustees



Dan House, President



Todd Clason, Vice President



Leandre Waldo, Secretary



Hope Baker-Carr



Charity Clark



Louis deRosset



Stuart Graves



Rebecca Gurney



Rodney Lowe

Developmental Senior Minister's Report

Developmental Senior Minister's Report



Since becoming a transitional minister two decades ago, I've learned to appreciate Annual Reports. In practice, these summaries of the year we've all just lived through can feel like one more task at the end of the year (at least for those who write them). An Annual Report isn't always fascinating to read... But for those who arrive in the future – even one or two years later – these year-end reports from the Board, the Minister(s), key staff and lay leaders provide a glimpse into how a congregation is growing and

changing; or perhaps how it has become stuck in a cycle of traditions, aspirations, and recurring problems. That kind of knowledge is essential to nurturing what can come next.

This past year has been a time of loss, grief, disappointment, and dislocation – for Vermont, for the nation, and throughout the world. The pandemic, persistent racial and economic injustice, and political upheaval have all made fear and uncertainty a daily reality. The effects will linger, perhaps for years. I would not be surprised if many of society's institutions notice shifts in the understanding of their purpose as a result – even, perhaps especially, religious communities.

While the losses have been significant, this past year has also been a time of extraordinary learning and innovation here at FUUSB. Dramatic adjustments caused by the risks of the pandemic as well as the resulting public health guidelines left almost no congregational systems or programs unchanged.

Membership in this First Unitarian Universalist Society of Burlington has, for nearly its entire history, been identified with the historic building known as the Meeting House, and its spacious surrounding grounds. But since March 2020, in-person gatherings on FUUSB property have been severely limited, and non-remote meetings inside the building almost non-existent. **We needed to reinvent all the ways this congregation interacts, worships, and makes decisions. That shared work has cultivated patterns of experimentation and creativity rich with lessons about what makes this Society vital and keeps it growing.** We're all looking forward to the end of restrictions, and being together in person. At the same time, we are determined to hold onto the gifts of connecting remotely that have allowed FUUSB to include more members and friends in everything the Society offers.

The list of changes and discoveries from this year is too long to include here – and that list is still emerging! As a snapshot of the 2020-2021 year, this report focuses on just two key areas where this year's adaptations and experiments could lead to substantive changes in the coming decade:

Continued on pages 6-8

Developmental Senior Minister's Report

WORSHIP... & OTHER WAYS OF BEING TOGETHER:

Without the option of worshipping in the Sanctuary, holding faith development classes or meetings or even conversations in person, all of us took a crash course in using technology to do it all remotely. Zoom (and a few similar platforms) are now the standard for Board, Committee and staff meetings, Membership classes, Chalice and Theme Circles, Coffee Hour, Yuuth Group gatherings and Family Chapel, as well as one-on-one conversations. **It's not clear how many of these groups will choose to continue meeting remotely, at least occasionally – but it seems likely some will.**

Given the very limited tech resources already in place at FUUSB to create worship services that members and friends could “watch,” we improvised – in a variety of formats and often using personal devices – and made full, pre-recorded services almost every week. By “we,” I am referring to a growing number of staff and volunteers: myself, several guest preachers, a creative team of Worship Associates, and generous family members who worked behind the cameras. Erika Reif and Margo Whitcomb raised Reflections for All Ages to new levels of excellence and creativity; and when Zoom Faith Development classes did not work for many families, Erika found ways to send them packets and projects, often delivered by enthusiastic non-parent volunteers. And the Stuffie Sleepover was one highlight that won't be soon forgotten!

It is impossible to overstate the essential role of FUUSB's Music Director, James Stewart, who produced every full recording for several months, and more recently has supervised a part-time assistant, Michael Wright, who took over almost half of the video production.

We have no way of knowing exactly who has watched those recorded services. But there is no doubt that number includes people living at some distance from Burlington, as well as others who would not have been able to attend in person at 10 a.m. on Sundays. Feedback confirms that though a majority of members deeply miss gathering in the Sanctuary, having an online option is popular. In fact, **online services are essential if we want to continue involving those who have joined us at a distance during the past 14 months.**

I'm very grateful to Woody Fulton, who took the lead on the tech upgrade project now known as *Beyond These Walls*, and to Stephen Rainville, Thayer Newport, and the many performers who contributed their talents to the May 16 MUUsical RevUue fundraiser for that project. **By this June's Annual Meeting, work should already be underway to install and upgrade equipment in the Sanctuary to allow us to “live stream” services as of this fall.**



Developmental Senior Minister's Report

During the late summer months of 2020 when infection numbers were relatively low, we experimented with holding small meetings and gatherings outdoors in the Memorial Garden under a rented canopy. This option became popular, especially after we added Wednesday evening Vespers services led by Rev. David Ruffin. Participants were asked to register in advance and to observe strict health guidelines, which generally worked well. Most weeks, Vespers had at least 15 attendees; several times we welcomed the maximum of 25 participants. Several non-members came – a few of them just once, though several continued to participate in FUUSB programs.



By the end of the eight weeks of Summer/Fall Vespers, David had gathered a team of volunteer musicians and worship planners – most of whom have stayed involved as Vespers moved online in the winter and spring. **No decision has been made on whether or how Vespers might continue... but it seems likely that some form of alternative mid-week worship will not disappear entirely.**

CARING & BELONGING... and More Than One Minister:

For over a decade, FUUSB leaders have become aware that expecting a solo minister to adequately support all the various ministries and programs of this decentralized congregation does not serve anyone well: not other staff members, not lay leaders, and certainly not the minister. Since a single professional minister can't be available to everyone, frustration or confusion or disappointment can arise – and such feelings can lead to burnout and disengagement. Several times in the last decade the Society has employed “second” ministers, with varying areas of focus – though all of them have taken on at least some responsibility in the areas of pastoral care and membership.

None of the five Developmental Goals identified in 2019 addresses this concern directly; though perhaps all of them do indirectly. The limitations of time and perspective that come with a single minister model make the challenges of governance, stewardship, and organizational “right size” harder to manage.

Two ministers can collaborate, share the load, and simply be more available to more people, more of the time. The key question is how to pay for it.

Trying to find ways to hold the congregation together this past year – while none of us could actually *be* together – brought this need into clearer focus. So, we experimented. Using surplus funds left over from fewer expenses in the 2019-2020 fiscal year, we hired the Rev. David Ruffin as a consulting minister for the second half of this year. His focus has been to work with lay leaders from the several teams grouped under “Caring & Belonging” in FUUSB’s organizational structure. Together, they have explored ways to nurture connec-

Developmental Senior Minister's Report

tions among individual members/families, cultivate collaboration among related lay teams (including the Justice Teams), and diversify ways people connect spiritually through worship. That work is ongoing.

David will complete a report to me and to the Board before the end of this year, and I will make sure that his conclusions are made available to the whole congregation. My preliminary sense, however, is that this experiment has been not only a great success, but a demonstration of the variety of ways additional ministerial support can support the Society's capacities. Working with a Ministerial Intern next year may be another. I'll keep you posted.

We are now at the beginning of the many-faceted process referred to as "re-opening." We anticipate a gradual and careful process of inviting members and friends to return for in-person events: starting with small, largely outdoor programs on the grounds in June and July; experimenting with non-traditional outside worship and a few live-streamed services in August; and a return to full in-person worship services (for those who choose to attend) in September. All of this will be dependent on the continued lessening of COVID infections and in compliance with state guidelines.

The new congregational year will present all of us with a new set of challenges – including the first steps in the process of searching for a new settled Minister. I'm looking forward to working on all of it with you. And I'm confident that good things and lots of learning will emerge in the process.

I am more grateful than I can say for the strong, caring leadership of many members and friends of this Society: the Board of Trustees, many key leaders, the Worship Associates, and especially the senior staff. Throughout this challenging year, FUUSB staff have been steadfast, flexible, and creative. To whatever extent programs and communication have "worked" amid so many dramatic changes, I give credit to the remarkable team of Christina Fulton, David McFeeters, Erika Reif, James Stewart, and Mary Williams. We can all feel fortunate to know they will be with us in the coming year as well!

Many blessings,

Rev. Tricia Hart



Director of Operations & Finance's Report

Director of Operations & Finance's Report



The 2020/2021 congregational year has been a year like no other. Never could we have imagined a more challenging and interesting time to be a staff member at FUUSB. You can certainly be proud of your Operations and Financial staff; I know I certainly am.

While most of our staff worked from home the entire year, David McFeeters and our Caretaker staff have been working diligently at the Meeting House. David grasped the great opportunity that this historic time offered us by leading his team in accomplishing many in-house projects that would have been difficult, if not impossible, to complete while staff and members were regularly meeting and working in the space. David and his staff were open to re-envisioning their job descriptions in order to take better advantage of this time. Please make sure to read the Property Team Annual Report for details of the many projects that were completed.

Mary, our Society Administrator, didn't miss a step all year. While she worked from home, she made sure that our *eNews*, *Steeple*, and Order of Service were completed on time. She answered your phone calls and emails as if nothing had ever changed. Mary was also the staff member who was keeping close track of the governor's press conferences and the ever-changing rules for the pandemic. Our staff met each and every week via Zoom this entire year, and at each meeting we discussed the most recent changes to the governor's guidelines and what that might mean to our congregation. Mary's willingness to keep track of these changes was a huge help to our staff and served our congregation well.

Anne, our Bookkeeper, also worked from home this year. While some of Anne's duties were not possible to complete from home, she continued to make sure that payroll was completed in a timely manner every two weeks, and that was really important. Anne has worked for the Society for over 20 years and we are truly blessed to have someone so dedicated.

Our Core Staff (Rev. Tricia, David, Erika, Mary, James, and myself) met weekly to discuss business. During this year we also made the decision to begin doing regular Anti-Racism work. These sessions will be held every other month and will be in addition to our regular staff meetings. Rev. David Ruffin will be assisting us with this process.

I have also worked from home this year, and for the most part have found it to be quite rewarding. I seem to be much more productive while working from home, and being able to break up my days with walks and comfy furniture has been good for my health. I have enjoyed the challenges, and opportunities for learning and creativity that this year has provided. But I miss the opportunities

Continued on next page

Director of Operations & Finance's Report

to meet informally with my colleagues, and while I have enjoyed seeing you in Zoom meetings and Zoom Coffee Hours, I miss seeing you in person.

As we move forward into a new year, I know that we will be stronger for having met this challenge so boldly. My hope is that we will continue to learn from this experience and find ways to continue on that will benefit us all.

Christina Fulton



Caring and Belonging

Staff Lead: Rev. Patricia Hart, Developmental Senior Minister

Caring & Belonging: FUUSB is a compassionate community, offering all who engage in its ministries a profound sense of welcome, belonging, and spiritual care through life's joys, struggles, and sacred passages.

Consulting Minister, Rev. David Ruffin

Care Network Team, Lynn Douglas, Chair; Sarah Weber, Meal Train Coord.

Membership Team, Sarah Russell & Ralph Undercoffler, Co-Chairs

Pastoral Care Associates Team, Linda Graves & Martha Molpus, Co-Chairs

Women's Alliance, Ellen Hsieh, President

Women's Spirituality, Elizabeth Clayton, Chair

The **Care Network Team** has not met formally during the 2020/2021 year; however, members have as a team and individually continued the work of the team: sending cards to individuals, sending shawls, making calls, organizing and participating in Meal Trains, and delivering flowers and shawls at Easter. Members have also participated in the calls to the congregation and future planning. Although meetings have been a struggle, willingness to step up to support others in our congregation and continue this work, despite difficult circumstances, has been a wonder. - *Lynn Douglas*

Under Rev. Tricia's guidance, the **Membership Team** has continued the work of creating programs and processes to encourage newcomers to connect to and join our Society. The Membership Team keeps in close touch with those who are newest to the congregation with information about upcoming programs and careful follow-up to assure they are feeling connected to the Society. The Team organizes and leads the New UU Part 1 and 2 classes, and we led three of these series online on Zoom during this pandemic year. We conduct online "Signing Sundays" for those who are ready to sign the Membership Book, and work with Rev. Tricia to introduce these new members to the congregation as part of an online service.

Rev. David Ruffin, Consulting Minister, guided the Membership Team from January-June. The team discovered ways to work with the other Caring and Belonging teams to design and deliver programs to congregants during this pandemic year and beyond. One thing that was hard was knowing how to connect with newcomers during the pandemic. A delightful surprise was the number of newcomers who connected with the Society during the pandemic and signed the Membership Book. - *Sarah Russell*

Continued on next page

Caring and Belonging



Membership Team meeting - top (left to right): Ken Swearingen, Sarah Russell, Martha Molpus (PCA Team), Ralph Undercoffler; middle: Sara Gold, Justin Jackson, Doug & Kim Watkin, Deborah Ragione; bottom: Linda Graves, Susan Warner-Mills & Marilyn Brill, Rev. Tricia Hart, Rev. David Ruffin

The **Pastoral Care Associates Team (PCA)** continued its spiritual support ministry, supervised by Rev. Tricia and, since December 2020, Rev. David Ruffin. The pandemic's required physical distancing with the danger of isolation was a challenge to the PCA Team's maintaining one-to-one support with members of the congregation. In September 2020 the team joined with other Caring & Belonging Teams for a retreat with Rev. David that led to becoming engaged in various ways to promote connections in our FUUSB community. Subsequently, the Pastoral Care Associates Team joined the Caring & Belonging initiative as a major focus. Team members participated in making phone calls, joining listening circles, and creating systems to promote congregational assistance. In the spring of 2021, the PCA Team, along with others, undertook "Moving Into Radical Welcome," a plan to support the congregation's return to the Meeting House in a mindful and inclusive way. The Pastoral Care Associates Team utilized listening, creativity, and collaboration to discern new ways to meet the spiritual needs of the FUUSB community.

- Linda Graves & Martha Molpus

Justice and Outreach

Staff Lead: Rev. Patricia Hart, Developmental Senior Minister
Lay Leads: Gene Bergman & Gare Reid

Justice & Outreach: FUUSB uses its power as an organization and faith community to work for social, economic and environmental justice.

Climate Justice Team, Jud Lawrie, Chair
Economic Justice Task Force, Gene Bergman, Chair
Gun Violence Task Force, Jud Lawrie, Chair
Immigration Justice Team, Bernie Carver, Chair
JUMP, Woody Fulton, Treasurer
Love & Justice Ministry, Zoe Hart & Kim Watkin, Co-Chairs
Partner Church, Bill Suiter, Chair
Racial Justice Team, Shared Leadership Model

Consistent with the End Goal of the Justice and Outreach Ministry, “to work for social, economic and environmental justice,” the newly-created **Climate Justice Team** continues to focus its activities on climate/environmental matters. A special focus is on how the climate crisis impacts most heavily on already marginalized BIPOC communities and people who are least able to cope with it.

We continue to meet monthly to plan various climate-friendly events and presentations in pursuit of our team goals. E.g., in 2020-2021, we offered several workshops and events such as climate-friendly cleaning supplies for the home, climate-friendly eating, weatherization, electric cars, and heat pumps.



One of our main difficulties this year has been trying to stay on top of the huge amount of available information and events that are relevant to this accelerating, planet-threatening crisis. A special delight was the opportunity to participate in an Earth Day-centered Sunday service on April 18, and a workshop the following Sunday titled, “The Climate Crisis: What Can We Do About It.” - *Jud Lawrie*

Over the past year, the **Immigration Justice Team** fulfilled its commitment to Justice and Outreach by making phone calls, sending cards, letters and emails to immigration policy makers, and by providing moral and financial support to individual victims of the injustices caused by their policies.

Our biggest challenge was countering false narratives from politicians while not being able to gather in person at the Meeting House or elsewhere. We believe that the overwhelming majority of asylum seekers are fleeing state-sponsored violence, climate-related disasters, gun violence and drug trafficking. In many cases, these conditions have origins in the United States.

Continued on pages 14-15

Justice and Outreach

We are grateful to UU congregants for providing generous financial support through us to our sister organizations – Chittenden Asylum Seekers Assistance Network (CASAN), and Migrant Justice.

We are pleased that several of the people for whom we have advocated over the past year have been released from incarceration. Our most delightful surprise was that Pastor Steven Tendo, an asylum seeker from Uganda, decided to move to Vermont because people here have “warm hearts.” - *Bernie Carver*



Immigration Justice Team - top (left to right): Carolyn & Richard Smiles, Bernie Carver & Sally Millichamp, Kim Watkin, Linda Graves; middle: Nancy Hellen, Mark Pendergrast, Caitlin Waddick, Mary Andrews; bottom: Linda Cooper, Susan DeClue, Jill Stevens; not pictured: Betty Molnar, Janet Biehl

Racial Justice Team - Our small team of dedicated members radically broadened our annual goals to not only provide spiritual and personal development to FUUSB members through learning about systemic racism and white supremacy; we also have taken our work outside of our



Society to work for racial justice in Burlington. By offering Black History Walks, three types of anti-racism training, and joining with VIA to work on Vermont Racial Justice Alliance goals, we have reached more than 150 participants. As we work for racial justice transformation within Burlington and with-



in our FUUSB community, we encourage everyone to do their part by joining our team or by joining in anti-racist work in your town. We are a small group with a large agenda and welcome all to support this essential work for our time.

- *Peggy Owen Sands & Caitlin Waddick*

Justice and Outreach

As was true for most organizations, **JUMP** (Join Urban Ministry Project) had to quickly revise how we operate in the past 15 months. Previously hosting walk-in clients at the First Congregational Church, JUMP, under the leadership of Managing Director Wanda Hines, devised an online and phone-in method of communicating with potential clients. It has worked out very well. The nature of our help has changed extensively, as we previously provided personal items such as cleaning supplies, toilet paper, diapers, etc., after ceasing to provide basic food supplies in 2019. Now, gift cards to Hannaford and City Market are the primary way of providing help, followed by a major increase in help with utility payments. JUMP volunteers are also calling clients every three months to check on their well-being and offering assistance as needed. Thanks to all at First UU who have supported JUMP. JUMP appreciates your, and First UU's budgetary, past and continuing financial support to its critical mission. - *Woody Fulton*



Stewardship and Resources

Staff Lead: Christina Fulton, Director of Operations and Finance

Stewardship & Resources: FUUSB generously stewards our mission and strongly supports ministries, activities and an historic building and spaces.

Facilities Manager, David McFeeters

Finance Team, Kameron McConnell, Treasurer

Garden Team, Nancy Knox, Chair

Planned Giving Team, Alex Hsieh & Janice Lange, Co-Chairs

Property Team, John Davis & Chip Patullo, Co-Chairs

Stewardship Team



Treasurer's Report:

The **Finance Team** stewards the Society's finances in support of our mission by reviewing budget proposals for the coming fiscal year and comparing the monthly financial statements to the approved budget. This year, income targets were realized and expenses beat projection. Spending took on a different focus when staff capitalized on new opportunities to care for one another and our Meeting House – spending on things like video editing software, Zoom accounts, and building maintenance projects that took advantage of the limited traffic indoors. The Paycheck Protection Program loan secured through the Federal CARES Act is not the reason income exceeds expenditures. Until forgiveness of the loan is secured later in the year, the money will remain unspent. The Finance Team strives to keep congregants informed of matters regarding the financial health of the congregation in terms that are accessible to all members. To that end, this fiscal year marks the second annual “Our Money, Our Mission” session and a new video series entitled “Two Minutes With Your Treasurer.” Learning to communicate creatively was a fun surprise in a very uncertain budget cycle. - *Kameron McConnell*

The **Planned Giving Team's** mission is to increase financial support to the First UU Endowment Fund by encouraging testamentary or similar gifts. This is a form of stewardship that emphasizes the need to ensure the long-term viability of our Society by building financial reserves to meet special needs and contingencies. We reach out to members to make the FUUSB part of their estate and financial planning. We did not host any events this year, but were pleasantly surprised to have two new members make a commitment and join the Legacy Society. - *Alex Hsieh & Janice Lange*

Stewardship Team:

The goal of this year's Stewardship Campaign was to keep it simple. We created a campaign that was easy on volunteers, members, and staff. At the same time, we decided to continue a culture shift that we had begun last year. So from now on, we will always assume that members of this congregation will continue to pledge. This one assumption helps us in many ways: 1) we start

Continued on pages 17-18

Stewardship and Resources

our campaign at the same level of pledging that we had the previous year, 2) members will only need to complete a pledge card if they are making a change to their previous year's pledge, 3) stewardship volunteers will not need to spend time chasing down members to get their pledge, and 4) members will be encouraged and welcomed to change/increase their pledge at any time during the year, not just during the stewardship campaign.

This year's campaign was also a huge saving on resources. Nearly all of our mailings and pledge cards were done electronically. This was a huge savings on paper, printing costs, and postage. Our volunteers were able to focus their time on writing beautiful thank you notes instead of folding, stuffing, sealing and stamping campaign materials. And probably the best thing for both volunteers and members is that we spent no time making phone calls trying to track down pledge cards.

This year's campaign featured some inspirational testimonials from members of your Board of Trustees and Finance Team. We know that hearing personal stories from other members is a part of the Stewardship Campaign that encourages other members to give meaningful gifts.

Another goal of this year's campaign was to encourage members to give in a sustainable way. This could mean giving electronically with an automatic deduction from your bank account, using a credit or debit card, giving through a donor advised fund, or giving appreciated stock. Soon you will receive an email with instructions on how to set up your automatic giving for the next fiscal year.

Whether you wrote thank you notes, gave testimonials, completed a pledge card, or just continued to pay your pledge, YOU are part of our Stewardship Team! We couldn't do what we do without you. - *With gratitude, Christina*

The **Property Team** has been busy this year even when the Meeting House was a quiet place for much of the past year or so. Although it was a collaborative effort of the entire team, I would like to thank Chip Patullo and David Foster in particular for leading the effort to rebuild the wheelchair-accessible ramp on the east side of the building to current accessibility codes and for the entire team that participated in the work. Had the building been open, it is hard to imagine how we could have done this project and still provided access to all users of the building. We saved the Society all the labor costs to complete this project which would likely have cost at least three times as much if we had not done the project ourselves! Our Facilities Manager David McFeeters was quite

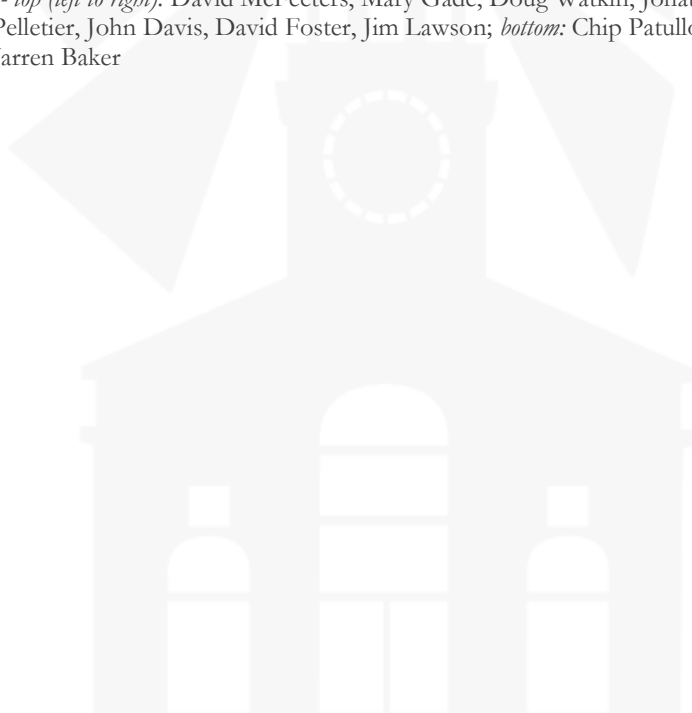


Stewardship and Resources

pleased to obtain \$16,000 in rebates for \$24,000 in expenses related to replacing existing heating systems with more efficient and greenhouse emission-free electric air source heat pumps. We unfortunately found two roof leaks in the Meeting House slate roof that cost us about \$12,000 to repair. This was an unanticipated expense that impacted our limited annual budget and will delay other projects we would have attempted if we did not have this expense. - *John Davis*



Property Team - top (left to right): David McFeeters, Mary Gade, Doug Watkin, Jonathan Sands; middle: Mike Pelletier, John Davis, David Foster, Jim Lawson; bottom: Chip Patullo, John Lincoln; not pictured: Warren Baker



Spiritual Growth and Learning

Staff Lead: Erika Reif, Director of Lifespan Faith Development

Spiritual Growth & Learning: FUUSB provides diverse opportunities for transformational spiritual growth, faith development and personal discovery, promoting lifelong learning for all ages and stages of life.

Faith Development Team, Erika Reif, Chair
Youth Ministry Coordinator, Gabriel Ely
Chalice Circles, Hope Baker-Carr, Coordinator
Labyrinth Ministry, Carol MacDonald, Chair
Library Team, Jeanne Lynch, Chair
Theme Circles, Rodney Lowe, Coordinator



Director of Lifespan Faith Development's Report:

In past years, so much of the work of the Children's Faith Development Team was centered around Sunday mornings at the Meeting House, but this has been a year like no other. Mostly untethered from those Sunday morning traditions, we focused on strengthening the ties that remained, hoping that each of our offerings would reinforce the small threads that connect our families to this congregation, to our faith, and to each other. We remained flexible; we experimented; and we continued to prioritize connection over content.

We tried to connect in ways we wouldn't in a "normal" year. We leaned heavily on our *We Are Going* newsletter, providing resources to use for at-home faith development, suggestions for crafts and activities, and links to our video reflections for kids who weren't "attending" our recorded services. At several points during the year, families had activity packets hand-delivered to their doors. We sent Family Chapel invitations in the mail. We installed Story Paths on the Meeting House grounds – children's books spread out to promote walking, reading, and UU values.



When the weather was good and Covid rates low, we held outdoor events for families in the Memorial Garden tent. When winter and Covid rates raged, we moved to Zoom for a monthly Family Chapel. Old traditions like the "Stone Soup" service at Thanksgiving, and the Christmas Pageant, found new forms, with participants of all ages. Meanwhile,

Continued on pages 20-21

Spiritual Growth and Learning



brand-new traditions emerged, like the Solstice Light Garden, the Blessing of the Animals, and the Stuffie Sleepover.

We've long talked of offering more outdoor programming and making use of the beautiful natural areas in our community, but without the pandemic pushing us out of doors, we might never have followed through with the "Outdoor Coming of Age Intensive," which has just begun as I write this report. Consulting Minister Rev. David Ruffin is leading four afternoon sessions where

youth can form or reform connections, share and explore, all while directly experiencing the wonder of the natural world.

It wasn't all successes. Great effort went into an attempt to continue our beloved 8th Grade OWL program despite the pandemic, but we were forced to postpone. While a few families have participated regularly, and many have popped up here or there, maybe posing as shepherds for the pageant or dropping off a stuffie, many others have not taken part in any obvious way. It's hard to know if they will still feel like they belong to this congregation after such a long hiatus. At the same time, new families have sought us out and participated in our remote offerings. Children who



have never set foot in our Meeting House are forming relationships with staff and other families, and are starting to feel those threads of connection, that we hope will hold us all together as we continue to be flexible, and experiment, and move into a new congregational year. - *Erika Reif*

The **Youth Group** has had an unusual year! Unlike years prior, we have held most of our weekly meetings virtually and have skipped many of our traditional events like overnights and pancake breakfasts. Our dedicated crew of youth met through the summer, organized a fall festival for younger children, played a lot of games, shared about our joys and struggles, decorated gingerbread houses, swapped baked goods, planted sunflowers, arranged and recorded solstice-themed songs, and contemplated monthly themes. In many ways, this year looked different from any other, but the fun, curiosity and fellowship that youth have shared with each other in years past has persisted. - *Gabriel Ely*

Spiritual Growth and Learning

With the arrival of the Covid pandemic a year ago, nearly all of the FUUSB **Chalice Circles** groups made a successful transition to meeting via Zoom, providing a vital link to virtual connection that has been especially meaningful during this anxious time. Several groups did not continue online and are on hold for now, while several others transitioned later in the year. An additional “Drop-In” Chalice Circle was offered, and with the guidance of Rev. David Ruffin and support of the Caring and Belonging Team, two different series of “Coffee Hour Circles” (newly named Sunday Circles) have been/are being offered to provide greater connection for members after the Sunday service. Because these groups do not require a commitment to attend on an ongoing basis, yet provide a platform for more personal sharing, they have been received enthusiastically. It has been particularly helpful this winter and spring to have professional support to help guide this program and Caring and Belonging in general. These Circles provide a place of belonging where members are welcomed, listened-to and cared-for as they navigate through this difficult time.

- Hope Baker-Carr



Worship and Music

Staff Lead: Rev. Patricia Hart, Developmental Senior Minister

Worship & Music: FUUSB's welcoming worship, supported by powerful and diverse music and art, acts as a magnet that fosters spiritual growth, compassion, introspection and impetus to action.

Director of Music, James Stewart

Flower Power Team, Peggy Derby & Susan Raimy, Co-Chairs

Hospitality Team, Ellen Wollensack, Chair

Welcome Ambassador Team, Deborah Ragione, Chair

Worship Associates Team, Melinda Lee, Chair



Sunday worship and music remain at the center of the Society's identity – even now, after more than a year of recorded services, Zoom choir rehearsals and solo musical offerings, plus periodic “virtual choir” gems created by James and the choir.

Everything changed this year, and many things stayed the same, too. After a few months of recording videos from our homes, we switched to filming at least part of every service in the Sanctuary. It made a difference to be able to see the pulpit and the pews (empty as they were), to hear the chiming bowl and see the chalice, to appreciate the beauty of Sanctuary banners and flower arrangements brought by members of the Flower Team. The tradition of Christmas Eve in the Meeting House continued, with well over 500 people watching the service that night, and for many days that followed.

The big lesson of this whole pandemic year is that the power of worship at First UU persists, even when we cannot be together in person. Hundreds of people in faraway places “joined” this congregation remotely through online worship, and dozens of members who cannot easily attend in person were able to stay connected. Reaching out on Sundays “beyond” the Sanctuary will continue even after we are together again, thanks to the many members and friends contributing to the Beyond These Walls Fund to make live-streaming First UU's services a reality in Fall 2021.

- Rev. Tricia Hart

The **Worship Associates Team** (WA) met monthly this past year to design our weekly worship services, along with Rev. Tricia. We said goodbye to some fabulous team members – Maeve McBride, Mavis Milne and Doug Facey – and we welcomed Jon Sallée into our group. We met together online for a “retreat” in August, where we discussed the selection and orientation of new



Continued on next page

Worship and Music

WA members and our group covenant. During the 2020/2021 year we met with the Racial Justice Team and separately with members of a White Supremacy study group to discuss how to enliven our worship services with diverse voices and concerns, thereby furthering the work of racial justice. We also discussed how and why we made the decision to include a land acknowledgement in our welcome each Sunday, thus honoring the continued Abenaki presence in our community. Continuing this year was the work of adjusting our worship services to an online format which has proved to be both joyful and challenging for us. We could not have accomplished this without the marvelous support of the UU staff – James Stewart most of all, plus Michael Wright and others. We look forward to the challenge of livestreaming our services and the eventual return to worshipping together in our historic Sanctuary. - *Melinda Lee*

The Flower Power Team: We have continued to provide arrangements for the Friday recordings in the Sanctuary. Continuing to provide flowers was a challenge at first. Some Team members work during the week and we all needed to reorganize our lives within the Covid restrictions. Once we adapted, regular arrangements were provided.

Team member Claire Graham-Smith has been commissioned to make a new banner quilt for the arch. This is in progress and will probably be finished this June. For our future return to the Sanctuary, I am working on having each member do an arrangement so we have a “garden” when we return to the pews. We have seven regular members and one for summer only. - *Peggy Derby*



Independent Teams

Independent Teams

Endowment Fund Team, Jason Cadwell, Chair

Healthy Congregation Team, Nancy Hellen & Noah Patullo, Co-Chairs

Nominating Team, Sarah Russell, Chair

Safety Team, Lisa Lax, Chair

The **Endowment Fund Team** serves the mission of this Society by assuring the Society's endowment funds are managed with the appropriate level of risk to achieve the returns necessary for the near and long-term needs of the Society. The Team works with an outside firm to oversee our investments and assure that they are socially responsible whenever possible. The Team also meets regularly with the fiduciary of the Nims Fund to monitor their investment practices and provide input regarding the needs of the Society for which the Nims Fund was created. The Endowment Fund Team is fortunate to have Jeb Spaulding as a new member. Jeb brings a tremendous amount of experience and has already provided fruitful input to the conversation.

The investment policies are drafted based on the input of the needs of other teams of the Society to fulfill their ends. In reviewing the performance of the First UU Society and the Meeting House portfolios that the Endowment Fund Team is responsible for, they have held up well in the current financial upheaval and should continue to support the mission of the Society as intended.

- *Jason Cadwell*

The **Healthy Congregation Team** (HCT) continued to develop a number of healthy communication and conflict resolution tools. Deep Listening Circles and Reflective Listening skills were practiced, and outreach to the congregation was done in an effort to provide support during the pandemic and other events of 2020. The HCT offered online Deep Listening Circles to the congregation as a way to connect, honor, and listen carefully to each other. The FUUSB covenant was explored during a HCT-led service in the fall focusing on how we uphold this living document and the way we are together. The HCT, in collaboration with the Caring and Belonging group, is presently focused on initiatives to support this transitional time from the ways brought about by the pandemic and how to intentionally move toward a radically welcoming community.

The Restorative Circles (RC) group strengthened with three new members completing RC training. The group continued to practice the skills and reflect on the process of this community self-healing process which is available to the congregation as a conflict resolution process.

By offering these communication tools, the HCT and RC promote a compassionate community and provide opportunities for spiritual growth, healing congregational rifts, and personal discovery. - *Nancy Hellen*

Annual Meeting

Annual Meeting Warning Notice

The congregation is warned that the **Annual Meeting** of the First Unitarian Universalist Society of Burlington will be held **Sunday, June 6, 2021 at 11 a.m.**

The meeting will be held remotely via Zoom at this link:

<https://bit.ly/3y8h8sA>. If you do not have internet access, you may call in to the meeting at (929) 205-6099 (Northeast US). Meeting ID: 937 3974 2046, passcode: 379132. Detailed instructions on how to participate will be emailed closer to the meeting date. If you need a paper copy of the instructions mailed to you, please contact Mary at (802) 862-5630, ext. 2100.

The following items of business will be addressed and voted on by the membership:

1. Accept the minutes from the 2020 Annual Meeting.
2. Elect candidates for openings on the Board of Trustees, the Officers of the Society, the Nominating Team, and the Endowment Fund Team.
3. Vote on the proposed budget. A summary of the proposed budget is included with this warning and is also available online at uusociety.org/members/meeting-minutes.
4. Other matters properly placed by the Board before the meeting.

People who signed the membership book as of 5/10/2021 and made a pledge and contribution of record in the last year are eligible to vote.

The following members have been nominated by the Nominating Team to be on the Board of Trustees:

Mark Kuprych – Trustee at large (2 year term, expiring in 2023)

Melissa Sallée – Trustee at large (3 year term, expiring in 2024)

Amelia Schlossberg – Trustee at large (3 year term, expiring in 2024)

Peter Clavelle – Trustee at large (3 year term, expiring in 2024)

The following members have been nominated by the Nominating Team to be Officers:

Hope Baker-Carr – President (2 year term, expiring in 2023)

Rebecca Gurney – Vice President (2 year term, expiring in 2023)

Zoe Hart – Assistant Treasurer (1 year term, expiring in 2022)

Three nominees to serve on the Nominating Team:

Nina Dahlstedt Buss, Woody Fulton, Alex Hsieh (3 year terms)

One nominee to serve on the Endowment Fund Team:

Debby Bergh (5 year term)

Nominees can be nominated from the floor with the prior consent of the nominee.

A Word from Our Director of Operations & Finance Regarding the Budget

At this time last year we were all concerned about how the pandemic might affect our Society's finances. We made a conscious decision to be guided by our faith and move into the 2020/21 fiscal year with a budget that was created before we even knew about the pandemic. We made a promise to you, our congregation, to watch our finances closely and to make adjustments to our budget as needed throughout the year. What we realized is that for the most part our budget was quite a good roadmap. We had to spend more money than planned in some areas and less than planned in other areas. But as we near the end of the 2020/21 fiscal year, I am happy to report that we are on track to end the year with a surplus. Our financial situation is sound.

You may wonder what happens with this surplus. Each year that we have a surplus, that money is put into our General Fund (GF). The GF is like a savings account. It is good practice for religious organizations to have about three months of operating expenses in the GF, which can be one measure of an organization's financial health. Over the past ten years, we've had seven years when we ended the year with a surplus and three when we ended the year with a deficit. We are on target to have approximately four months of operating expenses in our General Fund at the end of the 2020/21 fiscal year.

Over the past two years, the Board and Finance Team have been working with a budget cycle that was developed to make sure there are opportunities for the congregation to talk about our financial situation.

The budgeting cycle looks like this:

August	Report to Board on prior year end budget
September	Report to Board on current year budget
October	Board plans for information gathering
November	Board gathers information from the congregation
December	Board presents Executive Team with budget goals
January	Executive Team creates draft budget
February	Draft Budget presented to the Finance Team & Board
March	Our Money Our Mission presentation to congregation
April	Final budget presented to the Board for approval
May	Final proposed budget sent out to the congregation
June	Final budget is voted on at the Annual Meeting

Our hope is that the congregation feels like they have a say in the values upon which our budget is based, and that our Executive Team is always keeping those values in mind as we create our budget and work with it during the year.

In last year's report we noted that the congregation had received a Payroll Protection Program (PPP) Loan to assist with payroll expenses during the pandemic.

Continued on next page

Annual Meeting

ic. This loan is currently listed as a liability on our Balance Sheet. We are in the process of applying for forgiveness for this loan and expect to have the entire amount forgiven. Once the loan has been forgiven, it will move from being a liability into being an asset in our general fund. This money is not reflected in the budget at this time.

This year the Executive Team, the Finance Team, and the Board of Trustees are presenting a budget to you that is forward-thinking and represents our values as a congregation. In the following pages you will find a summary budget and a listing of budget assumptions and explanations. Please read through them and become familiar with the exciting things we have planned for the upcoming year. You will notice that the proposed budget has a deficit of approximately \$40,000. This may seem a bit concerning on first look; however, we feel confident that this is a prudent proposal at this time. As mentioned earlier in this report, we plan to have a surplus this year. That money, projected to be over \$50,000, will be added into our GF, giving us a General Fund balance of over four months of operating expenses. We will be able to cover this deficit and still have more than three months of operating expenses in our GF. Also, approximately \$33,000 of this deficit is to cover the ministerial intern, which is an expense that will not continue past the next fiscal year.

Our goal as a mission-based organization is not, and shouldn't be, to grow the GF. Our goal is to use our resources wisely to fulfill our mission. That is what this budget does.

Please do not hesitate to contact me if you have questions or concerns that you would like addressed prior to the Annual Meeting. We are proud to present this budget for your consideration.

Christina Fulton

First UU Society of Burlington
2021/2022 Fiscal Year Budget Summary
 As Approved by the Board of Trustees - April 2021

	FY 2019-2020 Actual	FY 2020-2021	FY 2020-2021	FY 2021-2022		
	Actual Income & Expenses	Total Approved Annual Budget	Projected Year End as of April 16	Total Proposed Annual Budget	Increase/ (Decrease) vs. Prior Yr. Budgeted %	
		INCOME				
Pledge Income	\$471,138	\$477,989	\$495,154	\$496,314	4%	
Loose Plate Collections	\$21,615	\$25,000	\$20,660	\$25,000	0%	
Subtotal Congregational Income	\$492,753	\$502,989	\$515,814	\$521,314	4%	
Rental Income	\$146,954	\$156,955	\$149,120	\$148,675	-5%	
Trust Income/Distributions	\$160,774	\$168,521	\$168,521	\$169,882	1%	
Other Income	\$22,485	\$20,950	\$12,742	\$21,450	2%	
Subtotal Non-Congregational Income	\$330,213	\$346,426	\$330,383	\$340,007	-2%	
General Fund Income	\$822,966	\$849,415	\$846,197	\$861,321	1%	
		EXPENSES				
Payroll/Benefits	\$543,412	\$599,395	\$540,000	\$640,399	7%	
Operating Expenses	\$119,617	\$125,530	\$105,000	\$132,037	5%	
Buildings & Site	\$72,139	\$74,000	\$85,000	\$69,640	-6%	
Ministry Teams	\$44,810	\$66,765	\$55,000	\$64,325	-5%	
General Fund Expense	\$779,978	\$865,690	\$785,000	\$906,400	5%	
Net Increase / (Decrease) to General Fund	\$42,988	-\$16,275	\$61,197	(\$45,080)	177%	
General Fund Balance, End of Year	\$229,790	\$213,515	\$290,987	\$245,907	15%	

* The \$45,080 deficit will be funded from the projected FYE21 General Fund Balance as needed.

** This will still leave the General Fund with 3.5 months of operating expenses.

Annual Meeting

2021/2022 Budget Assumptions/Explanations	
Income	
3% pledge increase	
Removal of Post Canvass Pledge line	
Angel Fund Income	
Estimate of unpaid pledges reduced from 3% to 2%	
Rental Income adjustment for 34 Elmwood Ave.	
Total Trust Income up 1%	
Misc. Income increase to \$1,000	
Total Income - 1% Increase over FYE21	\$11,906.00
Transfer from General Fund	\$45,080.00
Expense	
Payroll & Benefits	
1.2% COLA for all staff	
10% increase in Health Insurance premiums for 6 months	
Ministerial Intern - 10 months	
Director of LFD- given a 7.7% increase to bring her halfway to mid-point	
Director of Op & Fin - year 2 of 2 year plan to get UUA midpoint - \$4,200 each year	
Music Director decreased to reflect current contract	
Adjustments to Organist & Pianist number of Sundays	
Total Payroll & Benefits	\$41,004.00
Operating Expenses	
Total office expenses increase of 3%	
Increase of 4% in Property Taxes	
UUA Dues - Additional 17% to move us toward fair share	
Property & Worker's Comp Insurance Increase	
Increase in credit card fees to account for more people paying online	
Total Operating Expenses	\$6,507.00
Building & Site Expenses	
Church Utilities - increased 5% mostly due to phone system and internet increase	
Church Maintenance Contracts - decrease due to new elevator contract	
Site Maintenance - decrease because we're cutting our own grass	
Total Building & Site	-\$4,360.00
Governance & Ministry	
Guest Worship Leaders 17% increase due to UUMA recommended increase	
Added new line for Tech Production - \$5,000	
Membership Team decrease	
Ministerial Backup removed as the Intern will do this	
Racial Justice decrease by %25 per request	
Stewardship Consultant decreased -	
Lay Leadership Development increase to accommodate covering additional registrations	
Total Governance & Ministry	-\$2,440.00
Total Expenses - 5% Increase from FYE21	\$40,711.00

Minutes of the 2020 Annual Meeting First Unitarian Universalist Society of Burlington, Vermont June 7, 2020

11:26 AM: All participants were added. Christina Fulton provided a review of the rules of the meeting and options for participating.

BOARD PRESIDENT DAN HOUSE thanked Christina Fulton for her exceptional efforts both to make this meeting happen and for all she does each day for our congregation. REV. TRICIA HART lit the chalice and welcomed the congregation.

11:34 AM: BOARD PRESIDENT DAN HOUSE officially started the meeting.

WELCOME & INTRODUCTIONS: BOARD PRESIDENT DAN HOUSE welcomed attendees and called the meeting to order.

ACCEPTING MINUTES: Martha Dallas moved to accept the minutes, Tana Randall-Wolfe seconded the motion. There was no conversation. The minutes were approved.

ELECTION OF TREASURER, NOMINATING, ENDOWMENT & BOARD COMMITTEE SLATE: Tom Porter presented the slate. Peggy Owen Sands moved to approve the motion, Tana Randall-Wolfe seconded. The slate was approved.

VOTE ON USE OF MEETING HOUSE FUNDS: John Davis provided a brief summary of the request, which was also a part of the meeting warning. Tana Randall-Wolfe moved to accept, Cyndy Coy seconded the motion. The motion was approved.

VOTE ON THE PROPOSED BUDGET: Dan House presented the budget along with a video. Tana Randall-Wolfe moved to accept, Cyndy Coy seconded the motion. The motion was approved following a brief discussion.

MEETING CLOSE & ADJOURN: No additional business was presented. The meeting was adjourned at 1:03 PM.

Submitted by Leandre Waldo, Secretary